

REQUEST FOR PROPOSALS

Data for Equity

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Overview

This Request for Proposals (RFP) seeks to support nonprofit organizations working to improve the social determinants of health in Central Texas in testing evaluation practices designed to advance racial equity. Funds can be used to support data/evaluation projects that align with the principles of equitable evaluation or to convene learning opportunities with community and nonprofit partners to build their capacity for equitable evaluation.¹

The Data for Equity RFP aligns with the Foundation's overarching goal of advancing health equity in Central Texas. The Foundation believes that equity is both a process and an outcome. As an outcome, health equity is achieved when all Central Texans have a fair chance to achieve optimal health and there are no avoidable, unjust, unfair, or systematically caused differences in health status due to ethnicity, race, age, ability, or geography. This RFP is designed to advance the sector's understanding of what equity looks like as a process and an outcome for evaluation and strategic learning.

We recognize the important role race plays in advancing health equity and this RFP specifically focuses on advancing racial equity. We have adopted [Race Forward's definition of racial equity](#): As an outcome, we achieve racial equity when race no longer determines one's socioeconomic outcomes; when everyone has what they need to thrive, no matter where they live. As a process, we apply racial equity when those most impacted by structural racial inequity are meaningfully involved in the creation and implementation of the institutional policies and practices that impact their lives.

About St. David's Foundation

St. David's Foundation is one of the largest health foundations in the United States, funding \$80 million annually in a five-county area surrounding Austin, Texas. Through a unique partnership with St. David's HealthCare, the Foundation reinvests proceeds from the hospital system back into the community, with a goal of advancing health equity and improving the health and well-being of our most underserved Central Texas neighbors. St. David's Foundation also operates the largest mobile dental program providing charity care in the country and offers the largest healthcare scholarship program in Texas. Through strategic grantmaking, the Foundation seeks to center people and communities in all that we support and partner with institutions that promote health and well-being across the following areas of opportunity:

- Resilient Children
- Healthy Women and Girls
- Older Adults Age in Place
- Thriving Rural Communities
- Clinics as Community Hubs for Health

To learn more about St. David's Foundation, please visit www.stdavidsfoundation.org.

Rationale for Funding Equitable Evaluation

We recognize the central role equity must play in the processes and practices of the nonprofit and philanthropic sector if we want to advance equitable health outcomes. As the Foundation moves forward on our journey to center health

¹ Not everyone uses the term "evaluation" the same way due to diverse educational and professional backgrounds. For this RFP, we use the term broadly and include a range of evaluative methods and practices including reviews, inquiry of results, impact analysis and curious assessments. See Appendix for resources.

equity across all our practices, we are grateful to our peers and community partners who share their learning journeys and advance our understanding of what equity looks like in practice. Foundation participation in learning communities, such as [Good Measure](#) and the Equitable Evaluation Unlearning Community, have helped us to examine our own practices through a lens that challenges traditional models of evaluation that may be upholding systems that lead to inequities and generally do not incorporate the voices of the communities we aim to serve. These conversations have invited the Foundation to think about how equitable evaluation must depart from traditional practices that center the Foundation's interests and definition of success.

As we notice practices that should change and explore opportunities to work differently, we have looked to organizations like [MEASURE](#) who are paving the way for new models of equitable evaluation in our community. MEASURE recognizes community engagement as a necessary component for improving racial equity. Using data-driven approaches and fact-based research, the organization advocates for better public safety, health, education, and economic opportunities for marginalized communities in Central Texas. By building relationships and increasing community trust, MEASURE is able to positively impact the broader behaviors, laws, and policies that most affect people of color.

The focus on equitable evaluation in Central Texas is part of a larger conversation happening within philanthropy and the field of evaluation nationally. One key resource for philanthropic organizations that has led the way to innovation is the [Equitable Evaluation Framework^{TM2}](#) developed by the Equitable Evaluation Initiative that reframes evaluation based on three principles that center equity in both the process and product of evaluation. These principles offer guideposts for foundations and practitioners to hold us accountable to designing evaluations that are in service of equity, both in design and outcomes. They name the importance of participant ownership, cultural congruency, and recognizing systemic conditions that lead to inequities. These principles align with the [Foundation's evolving understanding of health equity](#) and have been a useful tool as we begin to work differently with equity in mind.

We recognize the power of shared learning between organizations entering the conversation from various roles, areas of expertise, and experience levels and hope to amplify these efforts through this RFP. We want to support the nonprofit and philanthropic sector in continuing this important work to center racial equity in our evaluation practices and invite organizations to share their ideas for testing equitable practices and creating space for collective learning.

Funding Priorities

This RFP will provide organizations with the funding needed to dedicate time and resources to apply equitable evaluation principles and models to their work and share what they are learning to advance racial equity. We recognize that some organizations are leaders in the space of equitable evaluation practices already, and we invite them to submit proposals to support their work and/or share best practices with their peers.

We are open to an array of projects and encourage applicants to include their own perspective on what equitable evaluation might look like in practice. Very broadly, funding can be used to:

- Align new or existing program, organizational, or community-level evaluations with equitable evaluation principles and models.
- Learn in partnership with community members and sector peers about what it looks like to apply equitable evaluation practices.

² Dean-Coffey, J. (2017). *Equitable Evaluation FrameworkTM*. Retrieved from Equitable Evaluation Initiative: <https://www.equitableeval.org/framework>

Competitive proposals will consider how their proposed project aligns with equitable evaluation practices including a demonstration of key considerations to center racial equity throughout the process such as:

- Diversity of staff and participants in terms of race/ethnicity, as well as lived experience
- Cultural appropriateness of activities, materials, and products
- Lived experiences as a core and valid aspect of rigorous methods and data
- Impact of systemic drivers of inequities on current conditions
- Potential benefits and harms that evaluation may cause community
- Power sharing and plans to not only include equity-seeking populations in the design and implementation of the evaluative work, but also in the review of findings, sense-making, and decision-making

The Foundation invites organizations to share the models, tools, and resources that they have found helpful as they learn about equitable evaluation. Organizations that clearly demonstrate an ongoing commitment to equity will be prioritized through this funding opportunity. We have included a few examples and resources for connecting equitable evaluation principles to actionable next steps in the Approaches to Work and Sample Projects section of this RFP.

We acknowledge that the conversation around equitable evaluation practices is relatively new to the Foundation and evaluation field more broadly. To this end, we plan to support awardees in participating in up to four learning opportunities throughout the grant term. These will include training opportunities lead by MEASURE on their C.A.R.E. (Community, Advocacy, Resilience, Evidence) Model for disruptive change makers and their equity focus group tool. In addition, we are looking to applicants for ideas and suggestions on additional opportunities of interest.

Vision for Impact

If we are successful, this RFP will lead to a cohort of partners who are using evaluation as a tool to advance racial equity, sharing successes and challenges in order to advance the nonprofit and philanthropic sector's collective understanding of what equitable evaluation looks like in practice. Ultimately, we hope that this RFP will deepen the Central Texas non-profit and philanthropic sectors' application of equitable evaluation practices, which in turn will result in organizational and programmatic changes that improve equitable health outcomes for our community. Shifts in practice follow shifts in thinking, and we will assess progress towards this long-term goal by first understanding how awardees' mental models for evaluation have shifted to center equity.

Following the completion of the projects, the Foundation will work with each organization to gather lessons learned, best practices, and participant stories. The purpose will be to share these materials more broadly with the field and the Central Texas community. We will use multiple mediums to do so, such as our website, and potential peer-reviewed publications from the perspective of participating organizations.

Eligibility Criteria

- The lead organization/applicant must be a tax-exempt 501(c)(3) nonprofit organization or a public entity (e.g., a municipality, health department, or university/school).
- Unincorporated organizations submitting a proposal must identify a 501(c)(3) organization that has agreed to function as its fiscal sponsor.
- This opportunity is open to organizations working in Bastrop, Caldwell, Hays, Travis, and/or Williamson counties. Note: applicants may have headquarters or offices located outside of Central Texas.
- Statewide and national organizations must be able to demonstrate meaningful partnerships with local organizations and communities. The work must clearly benefit Central Texas residents.
- Demonstrate strong fiscal management, which at a minimum requires: program operations for at least three years; two consecutive years of a clean audit; and the ability to access working capital or line of credit that

could cover at least two months of organizational expenses.

- Collaborations are welcome. However, a single applicant must serve as the lead organization and hold financial responsibility for the grant funds and overall project management. The lead organization may subcontract with collaborators or other entities.
- Organizations must not discriminate against participants or job applicants on the basis of race/ethnicity, creed, color, religion, sexual orientation, age, disability or handicap, sex, national origin, ancestry, citizenship status, genetic information, marital status, or veteran status.
- Organizations with existing St. David's Foundation funding may apply.

Funding

RFP awards will total up to \$200,000. Funding is limited to a maximum of \$25,000 per project for the first year with an option to renew funding for a subsequent year as learnings unfold. While some projects require the maximum investment to authentically leverage equitable evaluation practices, we are also open to smaller proposals that represent an improvement to existing practices and demonstrate incremental advancement towards applying an equity lens to evaluation.

Grant Term

Grants will be an initial term of 12 months. To support the implementation of what is being learned through the course of the projects, grantees may have the opportunity to extend funding for an additional 12 months.

Awardee Expectations

- Awardees may be convened by the Foundation up to four times over the course of the first year for collective learning opportunities including a workshop by MEASURE on the C.A.R.E. Model. Additional learning opportunities will be determined based on feedback from applicants on key topics of interest.
- The Foundation may strongly encourage awardees to participate in third party capacity building or technical assistance.
- Awardees will be required to work with the Foundation's Evaluation and Strategic Learning team to share lessons learned with the Central Texas nonprofit community.
- To support learning in real time with and from grantees, the Foundation will participate in the learning collaborative and may engage in additional learning conversations with grantees throughout the term to support evolving technical assistance and project modification needs. Progress reports will be required every 12 months.

Eligible Activities & Expenses

- Direct costs specifically and easily identified with the proposed activities, learning collaboratives, or evaluation (e.g., salaries, wages, fringe, incentives, materials/supplies, equipment, travel, consulting, marketing, publications).
- Allowable indirect rate may not exceed 15% for costs incurred for an organization's common objectives that cannot be specifically and easily identified with the proposed project (e.g., facilities, administrative support, audit, utilities).
- Collaboration and outreach expenses are allowed and encouraged to ensure participation in evaluation

activities benefits community participants. This can include expenses to ensure the activities proposed are effectively connected to other priority populations and appropriate referral sources (e.g., participant stipends, outreach activities, meeting expenses, food, supplies, and travel to community meetings, and referral sources).

Ineligible activities/expenses include:

- Services to individuals outside of the Central Texas five-county area
- Any activities not related to equitable evaluation
- Services for which there is available public funding
- New staff may not be hired under this grant unless there is an articulated sustainability pathway after funding ends or clear articulation that it is a term-limited grant-funded position
- Lobbying or activities to influence the outcome of elections
- Capital projects
- Endowed chairs
- Grants to individuals

Selection Criteria

Grants will be reviewed on a competitive basis by a panel composed of community leaders in racial equity and equitable evaluation. Successful proposals will demonstrate the following:

1. Focus on Racial Equity: Strong rationale for how proposed activities will advance racial equity in Central Texas.
2. Alignment with Equitable Evaluation Considerations: Approach in alignment with the equitable evaluation models and considerations.
3. Organizational Commitment to Equity: Clear demonstration that organization centers equity in both strategy and practice, including and beyond evaluation.
4. Community-Informed Programming: An approach that is led by and tangibly benefits communities most impacted by health inequities in Central Texas.
5. Defining Success: A clear picture of what will be accomplished during the grant term.
6. Sharing Learnings: Potential for advancing the sector's understanding of equitable evaluation.
7. Budget and Staff Capacity: Organizational capacity for success, based on staffing and financial strength.

Examples of strong and weak responses to each of these categories can be found in the [Scoring Rubric](#) in the Appendix of this document. In making final decisions, the review committee will give additional weight to factors such as racial diversity of an organization's leadership team, including executive staff and board.

Information Session

The Foundation will host a virtual information session to assist applicants in understanding the goals of this funding opportunity, learn from MEASURE on the value of equitable evaluation, and how to prepare their responses. The session will include a review of the main components of the RFP and will provide an opportunity to ask questions. A recording of the session and answers to questions posed will be posted on the Foundation's website approximately two weeks after the information session.

This information session is voluntary—applicants do not need to attend to apply. Date, time, and location of the information session is listed below.

Thursday, September 9, 2021

Time: 1:00 p.m.

[Register](#)

Organizations wishing to attend should RSVP via the link above by September 8, 2021.

Timeline

September 1, 2021: RFP Issue Date - [Apply Here](#)

September 9, 2021: RFP Information Session

September 10, 2021: RFP Office Hours

September 24, 2021: RFP Office Hours

October 1, 2021: RFP Response Date (by 5 p.m. CT by electronic submission)

October 2 – November 20, 2021: Review and Negotiation

December 1, 2021: Notice of Decision

January 1 – December 31, 2022: Grant Period

How to Apply

Proposals must be submitted online by 5 p.m. Central Time on October 1, 2021. Contact

evalstrategiclearning@stdavidsfoundation.org with any proposal questions and grantsinfo@stdavidsfoundation.org

with any technical issues.

[Application Link](#)

Application Questions

1. **Applicant Information:**

- a. Lead organization name
- b. Executive director/CEO name and contact information
- c. Project director name and contact information
- d. Mission statement

2. **Request Information:**

- a. Project title
- b. Requested amount
- c. Geographic focus, by county
- d. Other St. David's Foundation [goal area](#) alignment
- e. Summary statement (75 words): Provide a short summary of what the grant would specifically support.

3. **Proposed Activities** (500 words): Please describe the proposed work and how the project aligns with equitable evaluation practices and the goal of addressing racial inequities in health. Clearly describe the framework(s), activities (including how you will involve community members) and learning objectives. Clearly describe how this intersects with existing organizational practices or if this is a new initiative or approach to evaluation.

4. **Defining Success and Sharing Learning** (300 words): What does success look like? How do you plan to share what you learn with the community? If applicable, what are your proposed process and outcome indicators that describe shifts in thinking and practice?

- a. Through the [Metrics Webtool](#), applicants will set goals related to the process and outcome indicators listed above, as well as goals for Scope Measures, i.e., the count of individuals engaged with or served, and Common Measures, as applicable.
5. **Organizational Equity Journey** (300 words): We acknowledge that organizations are at different stages in the process of thinking and working differently to center equity. How does your organization incorporate equity, diversity, and inclusion in thinking and practice? Please include any trainings your staff or board has completed.
6. **Further Foundation Support** (200 words): In addition to the funds, what other supports could the Foundation provide to support your implementation of the proposed project?
7. **Learning Collaborative** (200 words): What specific topic(s) or question(s) does your team want to explore in the group learning opportunities?
8. **Video** (Optional): Based on feedback from partners on improving equity and accessibility in Foundation practices, in addition to a written proposal, applicants will have the option to submit a short two-to-three-minute video (via link to online platform such as Vimeo or YouTube) to expand on their proposed project. This is not a requirement but rather an optional supplemental medium to share ideas. Applicants who choose not to submit a video will not be penalized.
9. **Attachments:**
 - a. Project budget (use template provided; include subcontract budget if applicable)
 - b. Lead organization's agency budget
 - c. Current profit & loss and balance sheet for lead organization
 - d. Most recent audit or financial review of lead organization
 - e. Board list for lead organization
 - f. Key staff list for this project (from lead and collaborating organizations as applicable)
 - g. List of all collaborating entities and a letter of commitment from each, if applicable
 - h. Organizational diversity chart (use template provided)
 - i. 501(c)(3) Certificate
 - j. Form 990
 - k. A letter from an authorized government official or an IRS government affirmation letter (if a public entity)

Approaches to Work

- [MEASURE C.A.R.E. Model](#): Structural racism results in disparate outcomes for people of color. Achieving health equity requires making anti-racist evaluation tools available to support to those on the ground. [The MEASURE C.A.R.E. Model](#) is innovative within the social justice ecosystem as it encourages people of color to be data collectors and storytellers.
- The [Data Champion Guiding Principles](#) by Good Measure are recommendations for data and evaluation staff in the nonprofit sector that center equity. See the [2021 version](#) for the updated principles and examples of how each principle looks in action.
- The We All Count [Data Equity Framework](#) provides a systematic way of looking at data projects and identifying the ways bias, assumptions, unfairness, and prejudice can lead to inequities. This framework breaks the data project life cycle into seven stages and identifies unique challenges and opportunities to improve equity within each stage.
- The [Equitable Evaluation Framework™](#) by the Equitable Evaluation Initiative provides guiding principles to

ground the rethinking of evaluation in service of equity³.

Sample Projects

Below are examples of activities/projects that are eligible under this funding opportunity. If you have questions on potential projects, please schedule time during office hours or email evalstrategiclearning@stdavidsfoundation.org to discuss the idea with a Foundation staff member.

- Assess how your organization's programs, policies, or practices are unintentionally impacting groups differently. Gather feedback from clients and staff to ensure their experience aligns with intended results. Update data collection tools to disaggregate data to understand participation and outcomes by different characteristics while checking for potential bias in data sets and learning/research questions.
- Develop a nontraditional method of collecting community feedback from community members about a particular project or program. Reasonably apply their feedback to the system and evaluate how community voice has impacted the program or project.
- Develop new methods, processes, and formats for reporting findings back to clients or those participating to ensure usefulness to end user, focusing on information that can be understood and used by that community. This may mean developing visualizations and reports that are impactful for audiences at varying levels of data literacy, cultural responsiveness, and accessibility. Validate usefulness and understandability of new materials by gathering feedback from consumers.
- Create new tools to engage with the community. For example, create a chat box function on your website that uses logic to serve your community more effectively and efficiently. Measure its effectiveness and write a report on your findings.
- Convene practitioners/evaluators from the field to explore implicit bias and the role evaluation has played in reinforcing systemic inequities.
- Host learning conversations for the Central Texas evaluation community focused on shifting thinking and practice to center equity.
- Use community storytelling to advance health equity.
- Update survey tools to be accessible and available in the language(s) of those being surveyed. Gather input from clients to ensure cultural appropriateness of materials. Explore how process for analyzing results and sharing data can be informed by clients and in service of equity.

³ Dean-Coffey, J. (2017). *Equitable Evaluation Framework*[™]. Retrieved from Equitable Evaluation Initiative: <https://www.equitableeval.org/framework>

Appendix

Additional Resources

1. [Better Evaluation](#): Learn about the many ways people use the term “evaluation” due to their diverse professional or educational backgrounds and experiences.
2. [Why is Evaluation So White?](#) This article explores how the field of evaluation has approached race and the impact of this approach⁴.
3. [Equitable Evaluation Initiative: Pushing Thinking](#) has many resources on equity in evaluation, including presentations, research articles, reports, and guides, including:
 - a. John A. Powell, Connie Cagampang Heller, and Fayza Bundalli. “[Systems Thinking and Race: Workshop summary](#).” Oakland, CA: The California Endowment (2011).
 - b. Donna M. Mertens, “[Transformative Mixed Methods: Addressing Inequities](#).” American Behavioral Scientist 56.6 (2012): 802-813.
 - c. Alexis Stern et al. “[Reflections on Applying Principles of Equitable Evaluation](#).” WestEd (2019).

⁴ Shanker, V and De La Rosa Mateo, C. (2020). Why is Evaluation So White? Center for Evaluation Innovation Roundtable. MN IBPOC in Evaluation Community of Praxis: Minneapolis, Minnesota.

Scoring Rubric

	Weak Evidence	Poor	Avg.	Good	Strong
Focus on Racial Equity	There is little or no mention of racial equity as a fundamental reason for this project.				The applicant demonstrates a strong rationale for how the proposed activities/outcomes will advance racial equity.
Alignment with Equitable Evaluation Considerations	There is little or no evidence of how equitable evaluation models or principles will inform this project.				The project is grounded in one or more equitable evaluation model(s). Strong alignment with one or more key considerations. ⁵
Organizational Commitment to Equity	There is little or no evidence that equity has played a foundational and central role in the thinking or processes of this organization.				Equity is core to the organization's mission and is central to the thinking and processes of the organization including and beyond evaluation.
Community-informed Programming	There is little or no evidence that this project will be designed by and for the community members it seeks to impact.				The project is/will be designed by and for the community members it seeks to impact.
Defining Success	The project goals and processes are unclear and/or unfeasible given the grant term and funding and/or do not align with the goals of the RFP.				The goals to be accomplished during the grant term are clear, feasible, and aligned with the goals of the RFP.
Sharing Learnings	There is only passing mention of how information or knowledge gained will be shared, particularly with the community members engaged, and secondarily with the Central Texas evaluation community.				There is a clear and reasonable plan to share lessons learned from the project with the community and an aim to advance the sector's understanding of equitable evaluation.
Budget and Staff Capacity	The organization's operating budget and/or staff capacity indicate that there could be significant challenges to adequate program implementation.				The operating budget and staff capacity indicate that this organization could implement the program successfully.

Additional items the Foundation will be considered when designing the learning cohort and other program supports:

Organizations led by People of Color Organizations with board and/or executive staff team that are majority (>50%) BIPOC will receive additional points.

⁵ See *key considerations to center racial equity* on page 5