

Request for Qualifications

Building Capacity in Texas for an Equitable and Diverse Evaluation Field

KEY DATES AND INFORMATION

RFQ Open:	June 1, 2022
Notice of Intent:	<i>Encouraged but not required</i> – Send an email with subject line “Notice of Intent: [Team Name]” and a brief body that includes anticipated team members to Grant Patterson (gpatterson@houstonendowment.org) by June 15, 2022.
RFQ Contact:	Email any questions regarding the process to Jennifer Mineo (jmineo@episcopalhealth.org) by June 15, 2022.
Live Q&A Session via Zoom:	June 17, 2022, 9:30-10:30 AM CT. Please RSVP via email with Grant Patterson (gpatterson@houstonendowment.org) by June 15, 2022. Link will be provided upon request.
Application Submission:	Submit materials here .
Application Deadline:	June 30, 2022, at 5:00 PM CT
Select and Notify Consultant:	August 1, 2022
Project Dates:	August 2022 through December 2023
Project Budget:	Not to exceed \$200,000

ABOUT THIS FUNDER COLLABORATIVE

Background

As the field of philanthropy continues its journey of centering equity in all elements of grantmaking and organizational practices, evaluation staff in Texas are questioning whether equity goals can be achieved with the current evaluation resources available. Equitable evaluation requires that individuals with lived experience hold leadership and decision-making roles in all aspects of evaluation work. As the field of philanthropy moves to adopt equitable practices, engaged foundations in Texas must study the sector to 1. understand the degree to which those with lived experience have access to the knowledge and opportunities needed to achieve this vision; and to 2. ascertain how best to remove structures and norms that pose barriers to this valuable profession. Evaluators from several philanthropies in Texas have come together to explore ways we can contribute to the development of a network of

diverse practitioners and grow the field of equitable evaluation in Texas. Current collaborators include evaluators from Communities Foundation of Texas, Episcopal Health Foundation, Hogg Foundation for Mental Health, Houston Endowment, Methodist Healthcare Ministries, Michael and Susan Dell Foundation, and St. David's Foundation.

Purpose and Goals

This collaborative group of philanthropies seeks to connect with individuals and firms in Texas—that are interested in practicing equitable evaluation. The group aims to identify and invite evaluators with diverse lived experiences, students in training, those who are practicing evaluation that may not be using the term evaluation, those who call themselves evaluators, those who are entering the field, as well as those who are well equipped but may not be aware of the field of evaluation.

The purpose of this RFQ is to hire a consultant to partner with this collaborative group of funders to provide project management for the activities related to developing a collaborative strategy to further the field of equitable evaluation in Texas.

These activities include:

- **Environmental scan or similar approach:**
 - **Deliverables:** We anticipate this will be a project that will include primary and secondary data and will use a mixed-methods approach.
 - Document the current state of evaluators in Texas, including an inventory of the numbers, types, and geographic location of both practicing evaluators and training programs in Texas.
 - Document similar or related undertakings in the evaluation field, such as Expanding the Bench, Good Measure, and any equity-centered initiatives from local or state evaluation networks.
 - Gather evidence to identify strengths and gaps within Texas' evaluation field.
 - Identify areas of inequities and issues of historical/structural racism.
 - **Timing:** through the beginning of 2023
- **Strategy development:**
 - **Deliverable:** This will be a multi-year strategy that can collectively be implemented through grantmaking and other non-grantmaking activities.
 - Informed by the environmental scan, facilitate the development of a philanthropic strategy to grow and contribute to diversifying the field of evaluators practicing equitable evaluation in Texas.
 - **Timing:** 2023
- **Collaborative facilitation:**
 - Coordinate and facilitate meetings and document group processes and decisions.
 - **Timing:** throughout the project

Why RFQ, not RFP

This request is specifically formatted as a “Request for Qualifications” (RFQ) as opposed to a “Request for Proposal” (RFP) to minimize the barriers for interested individuals or firms.

RFPs frequently require that applicants provide detailed information on how they plan to accomplish the desired objective. A response to an RFP might include a constructed methodology, related processes, timelines, workflows, and a budget. A significant amount of uncompensated staff time and effort goes into developing such a proposal that may not end up being selected. RFPs offer an advantage to larger firms with experienced staff.¹

An RFQ, instead, requires that interested applicants give thoughtful consideration to the outlined request and offer information related to their individual or firm’s skills, knowledge, and related experience that are most applicable to meeting the desired objective.

PROJECT FOCUS AND USE

The newly developed strategy for equitable-evaluation field building in Texas should include short-, mid-, and long-term approaches. The collaborative group of funders will execute the strategy over the next several years. We anticipate the strategy will include both grantmaking and non-grantmaking activities and that each funder will engage in different aspects of the strategy. The strategy should include a theory of transformation; supporting theories of change; and an outline of recommendations, considerations, and activities to collaboratively fulfill the strategy. The scope of this strategy will be broad ranging, from building awareness for the profession to training programs and support for seasoned evaluators practicing equitable evaluation. Additionally, the strategy will include evaluators from various sectors, such as consultants, nonprofit evaluators, those working for government agencies, those in academia, and more.

The environmental scan (or similar process) will be used as an evidence base to inform the strategy development process. Additionally, the environmental scan should be designed in a way that can be easily shared with additional stakeholders who are also working on strengthening equitable-evaluation practice in Texas.

Consultant Responsibilities and Deliverables

Minimum responsibilities and activities led by the consultant include:

Activity	Deliverable
Kick-off meeting	Project workplan and budget through December 2023.

¹ Lo, F. and Espiritu, R. (2020). Evaluation is So White: Systemic Wrongs Reinforced by Common Practices and How to Start Righting Them. Accessed on April 22, 2022 at https://www.equalmeasure.org/wp-content/uploads/2021/10/Evaluators-of-Color_FEAN-Call-to-Action-Series_1.19.2021.pdf

Activity	Deliverable
Design environmental scan or similar process	Plan for environmental scan or similar research approach, including activities, data sources, timeline, etc., that help set context and understand the current reality and baseline data.
Carry out plan for environmental scan or similar process	Presentation and guided conversation of findings. A brief report outlining process and findings, which can be shared with external audiences.
Design strategy development process	Strategy-development plan, including activities, timeline, etc.
Facilitate the strategy development process	Strategy, including a theory of transformation and supporting theories of change for equitable-evaluation field building in Texas
Planning for communicating the strategy more broadly within each organization and externally	Visually designed materials that clearly communicates the strategy
Ongoing coordination and scheduling of the group	Scheduled meetings, meeting notes, documentation of the process, etc. Support group communication and learning.

Timeline and Budget

The project will begin in August 2022 and continue through December 2023. The total project budget is not to exceed \$200,000, inclusive of all expenses, activities, materials, and travel. Most work will be likely completed virtually, with some opportunities for hybrid collaboration. Interested parties do not need to submit a full project budget (see application process and requirements section) for the application process. In the beginning of the project, the consultant will work collaboratively with the funders group to co-develop the project scope, workplan, and budget.

APPLICATION PROCESS AND REQUIREMENTS

Application Timeline

Interested parties that have experience with DEI, strategic planning, and/or evaluation-related work are encouraged to submit the following information and materials using this [link](#) by June 30, 5:00 PM CST. Please carefully follow instructions below when submitting.

Application Materials

1. Form:

- a. Name or team name.
- b. Contact information.
2. Cover letter that includes the following:
 - a. Summary of relevant experience. See the Application Evaluation section below for more details.
 - b. How you operationalize equity in your work.
 - c. How you/your team is uniquely positioned to do this project well.
 - d. Availability and capacity to complete project within timeline.
 - e. Any possible conflicts of interest.
 - f. *Submit as a PDF with the following naming convention:*
[Team Name]_Cover Letter.pdf.
3. Resume or CV for each proposed team member.
 - a. *Submit as a PDF with the following naming convention:*
[Team Name]_Resume.pdf OR [Team Name]_CV.pdf.
4. Up to two relevant work samples.
 - a. *Submit as a single PDF with the following naming convention:*
[Team Name]_Work Samples.pdf.

If the relevant work sample does not lend itself to a .PDF format (if it is a website, video, etc.) please reach out to Grant Patterson (gpatterson@houstonendowment.org) and we will work to make sure you can get it submitted.

Application Evaluation

Prospective candidates will be evaluated based on their applications and interview responses on the following criteria:

- Depth of experience with collaborative strategic-planning projects.
- Depth of experience with environmental scans, landscape scans, strengths and needs assessments, or similar projects.
- Depth of experience with group facilitation and coordination.
- Content knowledge of equitable evaluation.
- Content knowledge of evaluation field building.
- Demonstrated commitment to diversity, equity, inclusion, and social justice.
- Quality of work samples.
- Understanding of project.
- Diversity of evaluation team including but not limited to identities, professional backgrounds, lived experiences, etc.
- Located or having deep connections in Texas.

Process and Timeline

- Please send a brief email with subject line “Notice of Intent, [Team Name]” and a brief body that includes team members to Grant Patterson (gpatterson@houstonendowment.org) by June 15, 2022, 5:00 PM CT.

- Submit all questions to Jennifer Mineo (jmineo@episcopalhealth.org) by June 15, 2022, 5 PM CT. Submit information and materials using this [link](#) by June 30, 2022, 5:00 PM CT. A live Q&A with members of the selection team will be held June 17, 2022, 9:30 – 10:30 AM CST. Zoom info will be provided closer to that date. Let Grant Patterson know by June 15, 2022, 5:00 PM CT if you plan to attend.
- Applications will be evaluated based on the criteria outlined above. Top candidates will be invited to participate in an interview via Zoom. Interviews will take place the third and fourth weeks of July. The selected consultant will be notified on August 1, 2022.

COLLABORATIVE PARTNERS

Current collaborators include learning and evaluation staff from:

- Communities Foundation of Texas
- Episcopal Health Foundation
- Hogg Foundation for Mental Health
- Houston Endowment
- Methodist Healthcare Ministries
- Michael and Susan Dell Foundation
- St. David's Foundation

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Collaborative partners reviewed and were informed by the following resources in designing this project:

- [Equitable Evaluation Framework](#)
- [Expanding the Bench – List of Terms](#)
- [It's Time to Let Go of Tired Narratives about Talent in Evaluation](#)