TITLE: DEI Support for External Program Design & Implementation and Internal Staff Development

ENGAGEMENT OVERVIEW:

REDF recently completed a strategic planning process and established diversity, equity, and inclusion (DEI) as a core pillar of its 2021-2025 strategy and institutional mission to support employment social enterprises. REDF also recognizes that the organization is still early in its journey toward becoming an anti-racist organization and is seeking support to advance this work. REDF is seeking a consultant to help further refine, strengthen, and provide implementation guidance for the strategy, to ensure that our intention to have DEI at the center is fully realized. The three main goals of this engagement are:

1. Advise on REDF’s intention and efforts to adopt an anti-racist stance.
2. Audit and provide recommendations on DEI within REDF’s strategy and key programs.
3. Assist with implementation of key DEI priorities via thought partnership, provision of best practices, process review/creation, and staff training and development.

The project period is anticipated to be September 1, 2020 - March 31, 2021, with a potential for follow on work and support based on performance and needs.

REDF OVERVIEW:

REDF is working to build a better, more inclusive society, where all people have the jobs and support they need—and the pride, purpose, and path to self-sufficiency they deserve. To make that vision a reality, REDF invests in employment social enterprises (ESEs), which are mission-driven, revenue-generating businesses that employ, empower, and invest in the potential of people.

By helping ESEs grow and sustain their businesses and by strengthening their ability to better support their employees in the long run, REDF seeks to create meaningful work opportunities that provide pathways to economic mobility and wellbeing for millions of people who are left behind in the labor market. In addition to increasing the number of people employed by ESEs, REDF will place greater emphasis on increasing opportunities for quality work and advancement for its target population. REDF believes that greater public and private investments in building the organizational and leadership capacity of ESEs will lead to more successful businesses that can employ and empower more people and support their long-term wellbeing. The main areas of focus for this engagement include REDF’s:

- Accelerator Program
- Growth Portfolio
- Impact Lending
- Capacity Building Services
- Community Offerings
- Partnerships
- Policy and Advocacy
SCOPE OF WORK

1. Refining REDF’s Anti-Racist Stance: After REDF explicitly established DEI as a pillar for its 2021-2025 strategy, a working group was created with support from leadership and staff input. The working group established five DEI objectives and a DEI vision to guide the strategy design process. Consultant support is needed to:
   - Advise on key questions to explore with REDF’s board around the ‘extent/nature’ of REDF’s DEI commitment and anti-racist actions.
   - Assist with defining and standardizing key terminology.
   - Support refining and communicating the rationale (i.e. business case) for REDF’s DEI focus and emphasis on supporting organizations led by people of color and those with lived experience as an asset-based approach (and avoiding deficit-based framing).

2. Review of REDF Strategy and Key Program Design Elements: As a part of the strategic planning process, REDF created an organizational theory of change and detailed program designs. With varying levels of DEI expertise across staff, there is uncertainty about how successfully and effectively DEI has been embedded into program-level activities and metrics. Consultant support is needed to:

   Strategy
   - Conduct a high-level audit of REDF’s 2021-2025 theory of change and outcomes to ensure alignment with DEI objectives and anti-racist vision; provide recommendations to leadership.
   - Review and provide recommendations on REDF’s proposed measurement and reporting framework for DEI-related goals and projections, using field wide benchmarks and/or data sets.

   General Program Design
   - Review program-level DEI activities and provide recommendations regarding best-practices, sequencing, and prioritization.
   - Based on the review, assist program owners with sequencing DEI focus areas and activities.
   - Provide follow on support to program owners as they execute on audit recommendations (in the form of thought partnership, sharing of best practices, etc.).

   Key Program Element #1 - Application and Selection Processes: REDF runs application and selection processes for nearly all programs and recognizes that a key part of ensuring equitable outcomes occurs at this stage of the process. Support is needed to:
   - Review the application, diligence, and selection processes for four REDF programs (Accelerator, Portfolio, Lending, and Community) and make recommendations to ensure equity and inclusivity and how to incorporate a diversity of voices into the decision-making process for funding.
   - Provide thought partnership focused on how to best quantify/capture the inherent value of being a POC/LE leader in this field to supplement more "traditional" scoring.

   Key Program Element #2 - Capacity Building Services and Curriculum: A key part of REDF’s theory of change and value add is the technical assistance (TA) and curriculum it delivers to ESE partners. A newly-formed capacity building team is responsible for developing and executing this service across programs.
   - Conduct a holistic review of the technical assistance diagnostic and its implications for Portfolio selection and structure. Provide recommendations about how to make the tool more inclusive and downstream impacts more equitable.
• Provide thought partnership regarding how to create a TA project proposal/selection process that is equitable, inclusive, and transparent across REDF teams and external partners; this includes the process by which Farber interns are assigned and dollars to hire consultants is allocated.
• Conduct an assessment of current TA project types and provide recommendations regarding how projects and their execution can incorporate stronger DEI practices.
• Review and provide feedback on the REDF procurement process for soliciting and selecting consultants, facilitators, and Farber interns and provide best practices on how to diversify consultant/facilitator rosters.

**Key Program Element #3 - Creating Diverse Partnerships:** REDF’s Theory of Change outcomes are predicated on establishing diverse partnerships in a number of programs (Outreach, Farber, Partnerships, Policy).

- Thought partnership and best practices are needed to identify, establish, and develop diverse (non-typical) REDF partnerships to strengthen outreach efforts to reach more diverse ESEs.
- Assistance and best practices regarding how to build a coalition of partners for advocacy and policy work in an equitable and inclusive fashion.

3. **Staff Training and Development:** REDF greatly values professional development for its staff. The HR department has already executed multiple growth mindset and anti-bias trainings, and staff are also given budgets to spend on individual training and growth.

- Review training provided to date and deliver a foundational DEI training to all staff to ensure everyone is operating with a similar baseline understanding of racism and its many forms (e.g. interpersonal, systemic).
- Based on the results from the strategy audit, create and execute an initial training plan for program staff in partnership with REDF’s HR department and leadership team. Training topics could include: mitigating bias in decision making, principles of trust-based philanthropy, trauma informed communication, doing analysis with a DEI lens, etc.
- Provide a list of external trainings and resources that program staff can reference and complete using their individual training budgets and time.

4. **Administrative:**

- Meet monthly with REDF’s Project Managers to provide updates on progress and troubleshoot as needed.
- Make a final presentation of findings and recommendations to REDF’s Executive Team at the end of the engagement.

**REQUIREMENTS**

• Successful track record in providing best-practice DEI recommendations to grant-makers, non-profits, CDFIs/lenders, and/or other social impact organizations.
• Experience supporting DEI inclusion in strategy refinement and implementation planning.
• Experience strengthening DEI practices in the areas of grantmaking, lending, curriculum development, and/or consulting services.
• Experience with providing DEI trainings, professional development, and facilitating difficult conversations across teams.

**TECHNICAL PROPOSAL AND AWARD**

Technical evaluation of the proposal is slightly more important than price. REDF will use trade-off analysis to make a best value selection decision. The selection decision will be made based on an assessment of
each Offeror’s quote. As such, REDF may extend an offer to an Offeror who has not quoted the lowest price or the highest rated technical submission, but rather the offer that provides the best value.

REDF is committed to a policy of equitable treatment and opportunity in its relations with consultants and potential consultants. REDF encourages and has a preference for proposal submissions from organizations led by and composed of individuals who are representative of the diverse communities REDF serves.

**Proposal Components:**
Proposal should provide the following:

- Project approach and explanation of how your methodology and services relate to the scope of work
- A company profile that covers the following:
  - Core competencies
  - Length of time in business
  - Physical location of company
  - Demographic composition of leadership team and staff
- List of references (3 minimum - 5 maximum)
- Relevant examples of previous work (2 minimum - 5 maximum)
  - Examples should be as close to the service requested as possible.
- Name and resume for the individual who will serve as the primary point person(s)
- A list of the team that will provide the services:
  - List each person’s role
  - Include a brief background summary for each team member
- Vendor and/or subcontracts that will be utilized (if applicable)
  - Please provide the work they will perform and the name, address, and EIN of the subcontractor(s).
  - REDF will not refuse to review a proposal based upon the use of sub-contractors; however, REDF retains the right to refuse the subcontractors you have selected.
- Budget, which must be clear, itemized, and detailed enough to show costs necessary to provide services listed in scope of work
  - The price you quote should be comprehensive. If your typical pricing excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees. Furthermore, please provide itemized pricing to the fullest extent possible. REDF may consider modifying the scope of work based on itemized costs.

**Guidelines for Asking Questions:**
- Questions can be submitted until 5pm PST on Tuesday, August 3, 2020.
- Submit questions to proposals@redf.org and questions will be answered in a timely manner.
- The source of submitted questions will be anonymous.

**Guidelines for Submissions:**
- REDF will review all proposals that meet the deadline and submission criteria.
- Proposals must be received by 5pm PST on Tuesday, August 3, 2020. Proposals received after that time will not be considered.
- Proposals must be submitted to proposals@redf.org. If you include a link to a file online, please make sure that it is not broken, since the deadline is non-negotiable. REDF will not allow proposals to be replaced or appended to after the deadline.
- Please use 11 or 12 point fonts and a minimum of 1.5 line spacing. Maximum proposal length including title page, cover letter, qualifications, proposal, and budget should not exceed 20 pages (including 5 pages of attachments).

**Review and Selection Process:**
REDF retains the right to utilize all aspects of the solicitation process including proposals, questions, interviews, outcomes of reference checks, and research.

- Bidders will be notified via email if their proposal has been accepted for review.
- Bidders not selected as finalists will be notified by email.
- Bidders selected as finalists will be notified by phone and/or email.
- Interviews with finalists will be scheduled as needed.
- REDF will not distribute a list of bidders, finalists or scores. That information is kept confidential and maintained for our use only in determining the source(s) that best fit our needs. Only aggregated data is provided to funders or others to whom REDF is obligated to report.
- REDF retains the right to terminate the review and selection process at any point.

APPENDICES:

REDF’s DEI Vision:

REDF’s organizational vision
REDF is working to build a better, more inclusive society, where all people have the jobs and support they need—and the pride, purpose, and path to self-sufficiency they deserve. To make that vision a reality, REDF invests in employment social enterprise (ESE) businesses that employ and empower people overcoming barriers to work.

Why DEI matters in our work
As the result of inequities stemming from policies and practices in housing, employment, and other spheres that have caused and exacerbated racial disparities over generations, roughly 75% of the people served by REDF’s partner ESEs are people of color.

ESEs across the country are led by a wide variety of deeply committed individuals. Some have life experiences that are similar to the people they employ. REDF believes that the perspectives of leaders with lived experience and leaders of color empower them and their staff to develop uniquely informed approaches that can increase the effectiveness of the ESE model.

How we are implementing DEI practices
REDF is committed to designing and continuously improving programs based on feedback from leaders and beneficiaries. This feedback allows us to increase our own effectiveness and has further encouraged us to increase the number of ESEs in our programs that are led by individuals with backgrounds that reflect the populations they serve.

We are committed to learning and sharing DEI practices across all of the ESEs we work with, so that more organizations use a Diversity, Equity and Inclusion lens to increase the impact of their work, and to help dismantle structural barriers within our programs and, ultimately, within our society that impede our progress.

We aspire to support organizations that embrace diversity, equity, and inclusion as essential pillars to this work and as employees of REDF, we affirm that we all have a role to play.

REDF’s Theory of Change:

By helping ESEs grow and sustain their businesses and by strengthening their ability to better support their employees in the long run, REDF seeks to create meaningful work opportunities that provide pathways to economic mobility and wellbeing for millions of people who are marginalized and are left behind in the labor market. In addition to increasing the number of people employed by ESEs, REDF will place greater emphasis on increasing opportunities for quality work and advancement for its target population.
REDF believes that greater public and private investments in building the organizational and leadership capacity of ESEs will lead to more successful businesses that can employ more people in need and support their long-term wellbeing.

**REDF’s 2021 - 2025 External DEI Objectives**

1. Develop a 2021-2025 Strategy that incorporates Diversity, Equity, and Inclusion intentionally into our program activities through practices that are validated by research and data
2. Create feedback loops within the strategy that allow for reflection and improvement based on learnings throughout implementation
3. Align strategy to reach ESEs led by POC/LE to learn from and understand how REDF can partner with social enterprises and its beneficiaries, and use their knowledge to inform the work we do and how we do it
4. Hold all staff accountable to change how we work to address the needs of social enterprises, POC/LE leaders, and beneficiaries
5. Support - through funding, convening, and TA - and learn from the DEI initiatives of the SEs we work with to deepen our and their understanding and implementation of DEI practices