LEGACY
FOUNDATION

Lake County's Community Foundation

Request for Proposals
Inclusion, Diversity, Equity, and Accessibility (IDEA) Consultant

Overview

Legacy Foundation is the community foundation for Lake County, Indiana. Our goal is to offer a personalized approach to giving that enables individuals, families, organizations, and businesses to create a charitable legacy. With over 300 funds and $60 million in assets, we have become the trusted source for philanthropic giving in the region.

Legacy Foundation invites proposals from qualified persons, organizations, or firms interested in entering into a contract to perform consulting services related to inclusion, diversity, equity, and accessibility (IDEA).

Legacy Foundation's Commitment to Inclusion, Diversity, Equity, and Access

We will not tolerate racism in our organization or in the neighborhoods where we live and work. As the community foundation for Lake County, we are committed to seeing all residents lifted to their fullest potential. Our experience has shown us that when we work together, there is positive and meaningful and long-lasting change. At Legacy Foundation, we are committed to taking immediate and long-term action to uplift the voices, the needs, and the rights of every minority group. We call on you to join us in the work of advancing racial equity and justice.

Our Commitments

1. Call out blatant and everyday acts of racism and discrimination.
2. Hold a series of internal conversations (Internal Equity Assessment) with Legacy staff and board.
3. Prioritize diversity of staff, board members, committee members, and consultants in Legacy's future hiring and nominating decisions.
4. Emphasize our commitment to IDEA (inclusion, diversity, equity, and access) in orientations for staff, board, and committee members.
5. More closely reflect the diversity of our community in our marketing materials.
6. Host a series of public conversations, leading to a joint community statement on equity.
7. Promote diverse attendance at Legacy Foundation events.
8. Prioritize funding for organizations focused on IDEA (inclusion, diversity, equity, and access).
9. Invest in leaders of color – increasing funding and professional development training and coaching.
10. Create a new fund or direct unrestricted funding to support programs that increase access to employment opportunities, education, and professional and business development for people of color.
11. Integrate IDEA strategies and accountability into grants and scholarships offered through Legacy Foundation.

Scope of Services

Legacy Foundation seeks a person or team to work with 6 nonprofits (including Legacy Foundation) to:

- o hold a series of internal conversations with organization staff and board
- o conduct organizational IDEA assessment and create an actionable, measurable plan with recommendations on how to improve IDEA practices. Evaluation should include, at a minimum, organization culture, community outreach, program/service delivery, board leadership, hiring, and policies.   The plan should support the organization's mission, vision, and goals; incorporate both internal and external practices, address leadership, employee engagement, hiring, stakeholder management; and community engagement.

We believe this work should engage all levels and areas of the organizations, from frontline staff to Board leadership.

Proposals

Interested parties should submit the following:

- A proposal with a clear consulting plan and timeline. The proposal should contain the following:
    - o Contact information
    - o Project description/approach
    - o Personnel information, including resumes of all relevant team members
    - o Contact information for 3 past clients who can be used as references
    - o Budget outline
- Please address the following questions in your proposal. Do not be limited by these questions but make sure to address them in your overall proposal.
    - o Describe your approach to IDEA training and include the following:
        - Sample workshop description and short outline
        - Your approach toward working with an organization made of individuals at varying levels of understanding and/or perspectives.
    - o Include a timeline of how frequently you would meet with organizational staff, in various groupings, including timing on both training and organizational level work.

Timeline

Proposals are due by 11:59 pm on September 7, 2020, emailed to Kelly Anoe, at kanoe@legacyfdn.org.

Any questions for this proposal can be directed to Kelly Anoe.

Legacy Foundation
Inclusion, Diversity, Equity, and Accessibility (IDEA)
Consultant Frequently Asked Questions

1. How do you define "access"? We are viewing access as having opportunities equitably distributed amongst all populations.

2. Who are the 6 organizations?   Legacy Foundation and 5 other nonprofits that serve Lake County, Indiana. They have not yet been selected, but will vary in size and scope.

3. Will the consultant have to conduct 6 different internal assessments or one for the group? There will be 6 separate organizations that will be at different places in their IDEA journey. Therefore, each organization will need its own assessment and plan.

4. Is there a steering committee or other group we would work with? There is no steering committee at this time (although that may be a recommendation of the consultant). The consultant would report to Legacy Foundation staff, who would then report to the board.

5. Who is the main client we would report to and is there one person who is the final decisionmaker? Legacy Foundation

6. What is the budget range? The budget has not been determined.

7. What is the start date? The consultant should include the start date as part of the timeline. Consultants will be selected by the end of September.

8. What is this project will take longer than 3-6 months? The 3-6 month timeline requirement has been eliminated. The consultant can determine how long this project will take and include that as part of the proposed timeline.

9. What is the availability of staff to work on this with the team? Legacy Foundation staff have made this a priority, and the other 5 nonprofits that will be selected must also commit to prioritize IDEA. However, some may be smaller organizations with limited capacity, so plans should be understanding of organizational size.

10. We saw that the proposal deadline is August 27. On the website, the deadline is listed as 11:59pm September 7. Which is the current deadline? We have extended the deadline until September 7

11. The RFP notes that "the Legacy Foundation seeks a person or team to work with 6 nonprofits." Would you clarify how the 6 nonprofits work together or plan to work together, for the purposes of this project?   The consultant would work with each nonprofit individually to develop a plan specific to each. However, there may be a cohort component where trainings or learning opportunities could bring the nonprofits together.

12. How many employees do the nonprofits have? Separately and all together? Nonprofits will vary in size. Not all employees need to be trained, the consultant could select a number or group of employees from each organization.

13. Who is eligible to apply for this opportunity? We are accepting proposals from consultant firms, non-profits, and other organizations with expertise in IDEA

14. Will Legacy Foundation reimburse the contractor for travel and related expenses? Proposed budgets should be all-inclusive. We will not reimburse for additional expenses.

15. Is Legacy Foundation open to virtual training being delivered via webinars and online?Yes, we are open to this format if the training is interactive and of highest quality to maintain attendee interest.

16. Is there a number of available hours by organization for involvement in this program?There is no set number of hours that organizations have been told to commit to this initiative, but organizations must commit to being engaged and available as required by the consultant.

17. How will consultant proposals be evaluated? Consultants are being evaluated based on experience, proven outcomes, references, and price.