



CALGARY
FOUNDATION
FOR COMMUNITY, FOREVER

REQUEST FOR PROPOSALS

Calgary Foundation

Racial Equity in Philanthropic Organization Audit

Submit questions and proposal to:

Djaka Blais-Amare / Director, Grants & Racial Equity Strategy

dblais-amare@calgaryfoundation.org

Opportunity for questions: January 4 – 29, 2021

Closing Date: January 29, 2021

Calgary Foundation is seeking a Canadian consulting firm or individual(s) to conduct an organization-wide racial equity audit to help guide us through a journey of establishing a Racial Equity Culture. [Equity in the Center](#) defines a Racial Equity Culture as one that is focused on proactive counteraction of race inequities inside and outside an organization. Calgary Foundation's racial equity journey closely intersects and builds on our Reconciliation Journey. Calgary Foundation's Leadership will oversee the audit process, informed by contributions from the Racial Equity Working Group.

A Little Bit About Us

Calgary Foundation has been nurturing a healthy, vibrant, giving and caring community since 1955. Our work facilitates collaborative philanthropy by making powerful connections between donors and community organizations. The Foundation looks to build a strong and sustainable charitable sector that serves the current and emerging needs of the community for the long-term benefit of Calgary and area. Calgary Foundation is a member of Community Foundations of Canada and registered charitable organization.

By applying our resources, expertise, and leadership, Calgary Foundation acts as a catalyst and convener, creating a meeting place that fosters partnerships to build a strong charitable sector that serves the needs of all members of the community. We inspire philanthropy, support the charitable sector and build a permanent endowment to address the current and future needs of our community.

To identify needs and address community issues, Calgary Foundation develops networks that transcend special interests, providing knowledgeable and effective grants in the areas of Arts & Heritage, Human Services, Education, Environment, Health and Neighbourhoods.

By working with donors and their advisors, Calgary Foundation designs giving plans that achieve their desired charitable and financial goals, ensuring donors receive the maximum tax benefits from their gift and endowed funds receive professional investment management that seeks leading risk adjusted rates of return.

Calgary Foundation has committed to active Reconciliation in accordance with the Truth and Reconciliation Commission (TRC) 94 calls to action and United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP) as an important and integrated part of our culture. Our Reconciliation journey is intentional with meaningful participation from all team members both collaboratively and as individuals.

Vision

To build a healthy and vibrant community where everyone belongs.

Mission

We inspire philanthropy, support the charitable sector and build a permanent endowment to address the current and future needs of people in our community.

- Know the community
- Engage community
- Connect donors with the needs they care about
- Make grants, make change – with the broadest range of organizations in the charitable sector

Values

The way we work will align with these values:

- Accountability – We are answerable to the community and our stakeholders for our practices and results.
- Compassion – We care about people and consider individual and community wellbeing.
- Excellence – We aspire to exceptional performance and are committed to best practices.
- Inclusiveness – We embrace diverse knowledge, backgrounds and perspectives and encourage collaborative communities.
- Integrity – We are trustworthy, honest, reliable and ethical.

How We Got to This Point - Background on Our Recent Racial Equity Journey

Calgary Foundation is undertaking an organizational culture change process and is committed to incorporating a racial equity lens into our practices and organizational culture. As part of our work in this space, we reached out to our volunteers, community leaders and staff in search of individuals who have valuable knowledge of racial justice, diversity and equity – and whose experiences can help inform Calgary Foundation’s efforts.

Calgary Foundation’s Racial Equity Working Group was established in September 2020 and is comprised of 18 individuals affiliated with the Foundation, including staff, board members, donors, volunteers, and the Foundation’s youth advisors. The Working Group is supported by the Foundation’s Vice President of Indigenous Relations and Equity, the Director of Grants and Racial Equity Strategy and a staff implementation team.

The Working Group will help guide Calgary Foundation through a journey of establishing a Racial Equity Culture, defined by [Equity in the Center](#) as one that is focused on proactive counteraction of race inequities inside and outside an organization. The Calgary Foundation’s racial equity journey closely intersects and builds on our Reconciliation Journey.

Role of the Racial Equity Working Group:

- Inform and contribute to Calgary Foundation’s racial equity culture strategy
- Support the racial equity audit process
- Assist with developing Calgary Foundation’s evergreen equity statement
- Inform and help develop learning opportunities for Calgary Foundation stakeholders

Calgary Foundation 2020-21 Strategic Directions

<p><i>Continued internal cultural shift through our reconciliation journey that enhances our capacity to be informed by and integrate an Indigenous lens throughout the organization.</i></p>	<p><i>Engage Equity-Seeking Groups to learn more about diverse approaches to philanthropy and strengthen our capacity to serve community.</i></p>
<p>We will build on our journey of reconciliation, with continued learning that results in shifts in behaviors, and informs changes in process throughout the organization. We will extend this value beyond internal staff, volunteers, board of directors to the community foundation movement in Canada as well as the local charitable sector. It is the process that we are realizing is just as important as the outcomes of this work. With this continued learning, attitudes will shift, the needle will be moved, and we will become part of a changing system whereby we are not complicit in the environments that create problems of inequity with Indigenous members of our community and society.</p>	<p>Foundations have access to forms of power (capital, networks, and influence) and as such it is important for us to be explicit in our commitment to equity. Equity is an approach whereby all people – including those who bear the burden of historic and contemporary forms of marginalization – have equal access to opportunities to define and achieve their role in philanthropy. By engaging with these groups, we hope to spark conversation about the role of philanthropy as a tool for change and keep our organization accountable to the whole community. We are proud of our history of addressing inequality but also recognize that there is more to do both in our organization and the community.</p> <p>The goal is to learn and celebrate the contributions that equity-seeking groups make to the philanthropic landscape, not just as recipients but as active contributors to the improvement of the community.</p>



What We Need

As a continuation of its commitment to racial equity in community philanthropy, Calgary Foundation seeks a consulting firm or individual(s) to engage in a comprehensive, organization-wide audit, which will culminate with recommendations on observations of internal policies, external communications, and organizational practices as they pertain to goals of racial equity. The key focus of the audit is to build internal capacity, as such, we prefer to co-develop the process with the selected consultant(s). The consultant(s) will work closely with the Director, Grants and Racial Equity and the Vice President, Indigenous Relations and Equity.

Scope of Work

1. Review of organizational policies and practices:

The racial equity audit would include working closely with the staff implementation team to review all parts of the Foundation's operations, including:

- Leadership
- Governance – Board of Directors
- Communications
- Grants, awards and loans management
- Impact and evaluation
- Finance
- Donor relations
- Volunteers
- Investments
- Capacity building
- Indigenous relations and equity
- Human resources
- The Stride
- Youth Council

Other areas for review may include:

- Built Environment
- Strategy
- Vision, Mission, Purpose
- Identity and Values
- Culture, Norms, Unwritten Rules

2. Develop recommendations

Including but not limited to an analysis outlining key themes, recommendations for incorporating action steps into administrative and programmatic areas.

3. Review of policies and activities of other philanthropic organizations

A compilation of racial equity programs of similar organizations to help inform recommendations.

4. Training for staff, board members and volunteers

Help inform learning experiences and training in line with developing a Racial Equity Culture.

5. Community Engagement:

Engage with community to receive feedback and assess perspectives of Calgary Foundation regarding racial equity. Community refers to non-profit and charitable organizations, donors, volunteers – centering the voices of Indigenous, Black and other racialized individuals.

Timeline

The work will be conducted over approximately 3 to 6 months beginning March 2021. However, this timeline is negotiable.

Budget

Our current budget is approximately \$50,000. We anticipate a phased approach for this work. Negotiable range aligned with project deliverables and outcomes. Proposed budgets should take into consideration Calgary Foundation's charitable status.

Project Deliverables and Desired Outcomes

Please indicate which deliverables align with your strengths and which you would need to work with someone else. We are open to a phased approach for this work and proposals addressing only part of the deliverables.

AUDIT

An audit of programs, policies, structures, practices, and culture resulting in qualitative and quantitative data regarding the current work and workplace of Calgary Foundation as well as stakeholder perspectives and expectations for future organizational culture change in relation to racial equity programming and practice.

REPORTING AUDIT RESULTS

We acknowledge there are different ways of sharing the results of the audit and welcome consultant(s) to use their preferred approach. Overview of the audit, delivered in preferred method, detailing its process, key themes, analysis of the gaps and disconnects between the current and future/desired state of the organization, and opportunities to build upon. The report should include recommendations for embedding new inclusive policies and practices into the organization's culture and into all function areas (as noted earlier) of Calgary Foundation, including achievable short-term action steps and sustainable, long-term goals.

TRAINING

In consultation with Calgary Foundation Racial Equity Working Group, develop a learning strategy to develop a Racial Equity Culture at the Foundation.

FIELD SCAN

A field scan of complementary efforts done by other philanthropic and non-profit organizations.

COMMUNICATION PLAN

In consultation with Calgary Foundation Communications Team develop a plan for how work or progress will be shared with the community during and after.

Proposal submission

Submit a proposal addressing the following:

1. Who you are:
 - Proposed project team member(s) bio and interest in this work
 - Approach to centering leadership and voices of Indigenous and racialized individuals

2. Previous experience:
 - Experience providing consulting services, including audits or assessments related to racial equity/diversity/inclusion/cultural competency
 - Experience working with organizations going through culture transformation
 - Experience and philosophy regarding your work as part of a multicultural/multiracial team
 - Relevant experience in the charitable/non-profit and philanthropic sectors
 - A case study as an example of your previous experience (what was the situation, what did you do, how long did it take, how did it go, what has follow-up revealed)
 - A sample list of past and current clients

3. Approach to this work:
 - Identification of which deliverables you can address
 - Work plan describing methodologies, approaches, and roles and responsibilities for how the work will be accomplished
 - Timeline
 - Confirmation of willingness and approach to work in concert with other consulting firms or individuals to achieve the deliverables, if applicable

4. Compensation:
 - Your expected rate and other estimated costs.
 - Breakdown of the proposed budget by deliverable.

With an eye for equity, Calgary Foundation can provide an honorarium to support the development of the proposal for applicants from equity seeking communities who express a need.

How to submit proposal

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Who are we looking for?

We will use the following criteria to select a consulting firm or individual(s) to conduct this work:

- Centering leadership and voices of Indigenous and racialized individuals
- Demonstrated commitment to operationalizing racial equity within your organization
- Experience undertaking equity audits, with a strong preference for racial equity audits
- Experience working with organizations going through culture transformation
- Understanding of the charitable sector in Calgary and area
- Shows willingness to learn everything they can about Calgary Foundation
- Approach grounded in decolonization, anti-racism and anti-oppression
- Proven experience engaging with community, especially Indigenous peoples, Black and other racialized communities, as well as grassroots initiatives
- Overall Budget with options to adopt a phased approach
- Can demonstrate facilitation experience, drawing from complementary and innovative methodologies, working in online spaces such as Zoom
- Be comfortable addressing sensitive topics with humility, confidentiality and grace
- Willingness to work in concert with a consultant(s) with complimentary skills

We consider ourselves an equity employer and encourage all those who identify as Black, Indigenous, People of color, settler decent, or have other intersecting identities to consider this opportunity.

We will invite shortlisted candidates for a conversation with our selection committee. We will notify whether you have been shortlisted by February 12th, 2021.

Thank you for your interest!