

## **Request for Information for Learning and Assessment Partner**

As a statewide foundation committed to health equity, The California Wellness Foundation seeks to identify a partner to help us assess and learn from the implementation of our current strategic plan, Advancing Wellness, across these dimensions:

1. Grantmaking: mix of strategies and approaches
2. Voice and influence: advocacy with key stakeholders, external communications, and relationships we've facilitated
3. Investments: combination of mission- and program-related investments and efforts to diversify the investment field

We seek to understand the difference Cal Wellness' funding and partnership made for our grantees and the communities they serve, in addition to how the foundation has utilized other levers for change to advance our mission. What impact have our investments made on our priority populations? Which strategies we funded made a difference? Which major investments paid off and which ones didn't? We also want to understand our missteps and/or missed opportunities. This is not a summative evaluation but an independent assessment that will be conducted while the Advancing Wellness strategy is still underway.

In addition to a learning and assessment partner, we're looking for a partner who might support us as we initiate strategic planning in 2024, who can help us to apply the insights and learnings from the assessment phase. Please tell us in your application if you also have strategic planning capacity.

This RFI is the first of a two-step process for determining who our learning and assessment partner will be. To reduce the amount of work applicants will need to do, we are asking for a short narrative (up to 4 pages) to identify prospective teams and their capacities. Teams invited to move to stage 2 of the application process will have the opportunity to develop a more detailed proposal and budget based on additional information about the project aims and requirements in the forthcoming RFP.

## About Cal Wellness

Cal Wellness's mission is to protect and improve the health and wellness of the people of California by increasing access to health care, quality education, good jobs, healthy environments, and safe neighborhoods. Since our founding in 1992, Cal Wellness has awarded more than \$1.1 billion in charitable contributions and 10,600 grants. As of September 30, 2022, Cal Wellness had investable assets of \$955M.

Cal Wellness advances our mission through using all of our resources: grantmaking, investments, sharing our learnings, leveraging our networks and influence, and lifting our voice. We partner with community-led organizations, philanthropic organizations, business, governments, and individuals who want to improve health and wellness for Californians. We strive to make real our deep commitment to racial justice, diversity, equity, and inclusion by taking actions to eliminate systemic barriers that prevent access to health care, education, employment, and safety.

The "Wellness Approach" is: responsive, statewide grantmaking; multi-year core operating support; funding of direct services, public policy, community organizing/power-building, and organizational capacity building; investing in leaders and prioritizing the health of underserved populations. We value ideas that come from organizations working to promote the health of the people of California.

## Our Current Strategy: Advancing Wellness

We introduced our current grantmaking program, Advancing Wellness, in October 2014 with a goal that every person in California enjoys health and wellness. Advancing Wellness was designed to continue our legacy of prioritizing core operating support and responsive grantmaking approaches.

In pursuit of Cal Wellness' mission to improve the health of the people of California, the Advancing Wellness grants program includes four grantmaking portfolios:

- **Community Well-being** which provides resources that support the health, safety, and resilience of communities of color, especially those that have been disproportionately affected by unhealthy environments and community violence.
- **Equity in Access** champions health care coverage and access for all and defends the rights of immigrants to enjoy access to health services, coverage, and other benefits.
- **Economic Security & Dignity** aims to advance the economic well-being of Californians, especially those from low-income communities and communities of color.
- **Leading for Power & Change** seeks to amplify the voices, leadership, and power of people of color, and other people who have historically been excluded from full participation in civic society.

Additional information on Cal Wellness can be found at [www.calwellness.org](http://www.calwellness.org).

## Project Scope of Work & Estimated Timeline

Given the complexity of this project, Cal Wellness will engage the selected team to decide together on the appropriate activities to accomplish our goals. The following represents our current best thinking on the phases of this project and the anticipated scope of work.

1. *Discovery Phase (March-early April 2023)*
  - Onboarding: meet with leadership team, grantmakers and individual meetings with 12-member board
  - Review strategy documents, past assessments and grant reports
  - Develop a comprehensive work plan to explore Advancing Wellness grantmaking, voice and influence, investments (Mission-Related and Program-Related Investment strategies)
  - Engagement with our internal core workgroup (4-member team)
2. *Analysis of Advancing Wellness Strategy (April-August 2023)*
  - Assess our Advancing Wellness grantmaking, voice and MRI/PRI investments
  - Review and analyze qualitative and quantitative data from our grants management system
  - Solicit input through a community engagement process
  - Draft analysis
  - Share preliminary findings and engage stakeholders for feedback
  - Provide monthly updates to internal core workgroup
3. *Findings and Recommendations (September-November 2023)*
  - Finalize analysis
  - Prepare written narrative
  - Present to staff, and incorporate any staff feedback
  - Participate in monthly meetings to update internal core workgroup on findings
4. *Wrap-Up & Transition to Strategic Planning (December 2023-January 2024)*
  - Meet with board strategic planning committee
  - Prepare and present final recommendations to full board
  - Create a final product summarizing key findings to be shared publicly

## Budget

Interested parties do not need to submit a full project budget at this initial phase.

A budget will be requested from teams who are invited to submit a more detailed proposal in stage two. However, please include a description of your general approach to determining a budget in your application.

## Selection Process

The selection of a finalist will be a two-stage process. Cal Wellness will use the responses to this Request for Information to identify teams interested in leading this work, assess applicants' qualifications and capabilities, and understand the teams' approaches to learning and assessment. We are committed to respecting applicants' time by not asking them to develop a detailed proposal and budget in this initial stage. In the second stage, a small number of teams will be invited to respond to a Request for Proposal. The RFP will allow us to consider the proposed approaches of a select group of applicants and to have direct conversations so as to identify the best match.

Applications are welcome from organizations/firms or teams comprised of multiple consultants with a designated project lead.

## Selection Criteria

- Credibility in the field: proven track record working with foundations and nonprofit organizations
- Depth of experience with projects involving evaluation, authentic community engagement and strategic planning; capacity to leverage futures thinking and scenario planning is a bonus
- Capacity to work closely and communicate regularly with the foundation board and leadership team
- Ability to support a culture of learning and reflection
- Demonstrated commitment to diversity, equity, inclusion, and racial justice.
- Diversity of team members including but not limited to identities, professional backgrounds, lived experiences, skills/competencies and issue areas with which they have significant experience or expertise
- Quality of work samples
- Located in or having deep knowledge of California

## How to Apply

Interested parties are encouraged to submit the following by November 22, 2022:

1) **Cover letter** that includes the following elements (not to exceed 4 pages; this does not include page count for team bios and work samples):

- Name or team name
- Contact information
- Organizational philosophy or mission (if you have one)
- The values that guide your work and your approach to engaging with new clients.
- How you/your team is **uniquely positioned** to do this project well, including a brief description of relevant projects and services. Include any experience with participatory, equitable evaluation; strategic planning; futures thinking; and/or trust-based philanthropy.
- How you operationalize justice, equity, and cultural relevance in the approach to your work.
- Summary of background and experience of core team members who will be assigned to Cal Wellness. Name any external partners who might also be engaged in support of this project.
- Current projects and commitments of the proposed team, and how these will impact your team's availability to complete our project within the outlined timeframe.
- Approach to developing a project budget.
- Prior relationships with Cal Wellness, if any. Any possible conflicts of interest (e.g. family, friendship, or business ties to Cal Wellness).

Submit as a PDF with the following naming convention: [Team Name]\_Cover Letter.pdf.

2) **Team bios**

Please include the bios of core team members who will be assigned to this project and any external partners who might also be engaged in support of this project. Submit as a combined PDF with the following naming convention: [Team Name]\_Bios.pdf.

3) **Up to two examples of relevant past work**

Submit as PDF files, link to website, or other sources of existing work.

***The deadline to submit an application (cover letter plus attachments) is 11:59 p.m. PST November 22, 2022.*** Materials should be submitted via email to Brooke El-Amine at [belamine@calwellness.org](mailto:belamine@calwellness.org). Please feel free to reach out with any questions.

Optionally, we would appreciate being informed of your intent to reply to the RFI by November 16, 2022 via email to Brooke El-Amine at [belamine@calwellness.org](mailto:belamine@calwellness.org).

## Key Dates

<b>STAGE 1</b>	
RFI – Request for Information released	Nov 8, 2022
Notice of intent to apply (optional): please email <a href="mailto:belamine@calwellness.org">belamine@calwellness.org</a> to affirm your intent to submit an application	Nov 16, 2022
RFI Due	Nov 22, 2022
Applicants notified of status	Dec 13, 2022
<b>STAGE 2</b>	
Select applicants from Stage 1 will be sent RFP – Request for Proposal	Dec 13, 2022
Proposals due	Jan 11, 2023
First-round of interviews	Jan 25 & 26, 2023
Finalist interviews	Jan 30- Feb 2, 2023
Applicants notified of status	Feb 10, 2023
Contract with selected applicant negotiated	Feb 13-28, 2023
Project begins	March 1, 2023