



EPISCOPAL HEALTH  
FOUNDATION

**Episcopal Health Foundation's  
Equity Planning Initiative**

**Request for Proposal**

**Deadline: [Friday, August 26, 2022](#)**

# BACKGROUND

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## **About the Foundation**

The [Episcopal Health Foundation \(EHF\)](#) believes all Texans deserve to live a healthy life - especially the poor and those with the least resources. Our public health orientation leads us to focus on upstream work that goes beyond providing healthcare services in a doctor's office and seeks to address the underlying social, economic, behavioral, and environmental causes of poor health. We are most interested in work that takes a systems approach to improve community health, which leads us to focus on creating and supporting intentional connections between and among institutions aimed at not just improving healthcare delivery but transforming the health of an entire community. With more than \$1.2 billion in estimated assets, EHF operates as a supporting organization of the Episcopal Diocese of Texas and works to help improve the health and well-being of the 11 million people living throughout a 57-county region of the Episcopal Diocese of Texas (EDOT).

## **Our Equity Journey**

Over the years, EHF has undertaken various activities to help staff explore and understand the terms **diversity, equity, and inclusion (DEI)** and what they mean at the individual level and for EHF's externally-facing work. In 2019, EHF formed an **Equity Workgroup** comprised of staff from across the organization to help advance equity as a framework at the enterprise level, support staff in their own journey to deepen their understanding of equity matters, and develop ways in which to more intentionally operationalize the values expressed in EHF's [Strategic Plan](#) regarding equity.

To establish a common definition of **health equity**, EHF adopted the following definition of health equity developed by Paula Braveman for the Robert Wood Johnson Foundation: *"Health equity means that everyone has a fair and just opportunity to be as healthy as possible. This requires removing obstacles to health such as poverty, discrimination, and their consequences, including powerlessness and lack of access to good jobs with fair pay, quality education and housing, safe environments, and health care."*

The diagram below illustrates EHF's journey as we leaned into being more intentional in viewing potential investments through a health equity lens. Although the genesis of much of this work occurred in 2019 or earlier, the timing of these efforts occurred during a nexus point that coincided with the heightened call for racial justice across the country and the increased public awareness of the impact of health disparities made more apparent because of the COVID-19 pandemic.

## EHF's Equity Journey



EHF's **Equity Workgroup** developed a goal statement to help guide this work:

*Rooted in faith and active in hope, EHF is uniquely positioned to build bridges of health and wholeness alongside communities, valuing participation of all groups and honoring all human dignity. In recognition of our commitment to health equity, we align our policies, practices, and resources so that all people have genuine opportunities to thrive.*

In keeping with this commitment, as outlined in the Strategic Plan, EHF will:

1. Prioritize support for individual staff to develop the capacity to explore health equity
2. Operationalize internal practices
3. Adopt a specific and actionable health equity plan by which EHF would hold itself accountable for both internal and external development

In support of the first goal, EHF established **equity circles** – small cohorts of staff across divisions to help individuals delve deeper into issues related to equity. Staff also participated in a six-week program focusing on implicit bias. The small groups meet on an on-going basis, with an equity-based topic to help with discussion, to allow staff to continue learning in a small group setting where staff can establish trust and vulnerability. While the equity circles are a dedicated space for supporting individual staff growth and development on equity, we have also identified other opportunities as appropriate such as staff learning conversations, all-staff meetings, staff retreats, and individual professional development goals.

## **Equity Audit & Implementation Metrics**

To address the second and third goals, members of the Equity Workgroup facilitated an **equity audit** of the organization's work to identify the areas where EHF could strengthen its commitment to health equity.

Through the equity audit, EHF looked at how health equity manifests itself in the work of the foundation and the work *within* the foundation. Each division conducted a review of its work to identify opportunities and gaps in how diversity, equity, and inclusion practices are represented and ways to further advance its work towards the goal of health equity. Further, each division developed more detailed plans for implementation, and metrics by which EHF can measure progress.

EHF established metrics to help us fully realize the vision to establish health equity as a central guiding principle that directs our approach, as stated in our strategic plan. The defined metrics will be reviewed periodically and reported to EHF's Board of Directors twice a year.

## **PROJECT OVERVIEW**

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### **Project Goals**

EHF leadership and staff recognize that this effort is a journey, not a destination, and that to support the organization for this journey, we need to recognize where we are and what we need to do to get to where we want to go.

Our goal is to continue moving our DEI work forward, with a focus on both internal learning for staff while incorporating all aspects of internal and external work. We seek a consultant to facilitate this process with EHF's Equity Workgroup and to help us plan the work to undertake in 2023.

Activities related to this work should include but are not limited to the following three major tasks:

- 1) Understand the various DEI activities the Foundation staff have completed and become familiar with who we are and the current stage of learning equity. Provided the understanding of previous work and current initiatives, the consultant will work closely with the Equity Workgroup (EWG) to identify possible next steps and provide overall goals for the 2023 equity work.
- 2) Facilitate strategic planning sessions with the EWG to identify DEI competencies and skills contributing to the 2023 equity goals and to ensure alignment with EHF's Equity Implementation Plan.
- 3) Co-develop a detailed DEI work plan for the 2023 calendar year. The plan

should include a timeline with specific activities and clear DEI learning objectives for staff development, which the EWG will later implement.

Throughout the process, the consultant will work in partnership with the EWG, via the co-chairs as primary contacts to facilitate this process.

### **Deliverable**

The deliverable for this project is a one-year work plan aligned with our established equity goals for the 2023 calendar year. EHF's EWG will implement the plan for the full staff beginning January 2023.

The work plan should reflect who the Episcopal Health Foundation is, where we are on our equity journey, and realistic next steps to move us forward.

## **CRITERIA FOR CONSULTANT SELECTION**

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### **Consultant Criteria**

An ideal candidate will have:

- Demonstrated experience with institutional diversity, equity, and inclusion (DEI) efforts
- Strong strategic planning skills and relevant experience with strategic planning processes
- Experience developing/planning learning sessions and delivering work products focused on DEI
- Strong facilitation skills and knowledge of a variety of topics related to DEI in a multicultural organization
- A collaborative and professional demeanor

## **PROPOSAL REQUIREMENTS**

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If you/your organization is interested in applying, please submit the Proposal Requirements to Melodee Toles, [mtoles@episcopalhealth.org](mailto:mtoles@episcopalhealth.org) by **Friday, August 26, 2022** at 12 PM.

### **Proposal Content**

- Cover Letter.** Write a cover letter expressing interest in EHF's Equity Planning Initiative
- Excerpts or Relevant Examples.**
  - Provide relevant examples for similar equity projects completed within the last five years, e.g. slide decks, written reports, etc.
  - Excerpts should include a project description, dates of work, and a client

reference that includes name, title, email and phone contact

- **Description of Work.** Address each of the sections below:
  - **Organization name and designated point of contact.**
  - **Approach to equity planning initiative.** Provide a brief description of the approach and address each of the following:
    - Provide a narrative describing methodologies, approaches, and responsibilities for how the work will be accomplished.
    - Describe how you envision the engagement of the EWG and co-chairs throughout the process.
  - **Deliverable and proposed timeline.** The contract length will be three months, starting September 2022 with a possible extension.
    - Identify the timeline of collaboration with the EWG, based on what is reasonable within the budget
    - Provide an actionable work plan that identifies activities and intended outcomes, including detailed aspect for each phase of the work, if applicable
    - Identify the timeline by which the work plan will be executed
  
- **Budget.** The contract budget may not exceed \$30,000. Provide a detailed budget proposal to include:
  - Consultant rates

## PROPOSAL REVIEW AND SELECTION PROCESS

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**RFP Release Date:** Monday, August 8

**Proposal Submission Deadline:** Friday, August 26 @ 12 PM

*Top consultants may be asked to present/interview*

**Internal staff review and recommendation:** Thursday, September 1

**Notify selected consultant:** on or before Wednesday, September 7

**Project work to begin:** September 2022

Please direct all questions to Melodee Toles, [mtoles@episcopalhealth.org](mailto:mtoles@episcopalhealth.org).