

## Request for Proposals (RFP)

### **Funder Landscape Assessment for Climate Equity Technical Assistance and Grantmaking Opportunities in Ohio**

#### **Introduction**

To assess and develop an impactful grantmaking and technical assistance strategy, the Equity Fund is conducting a 6-month assessment period focused on understanding current opportunities and challenges for supporting work led by and within Black, Latinx, AAPI, immigrant, and multi-racial working class communities in Ohio. This assessment will inform our work including alignment and support from other philanthropic partners to strengthen the philanthropic and field infrastructure necessary to support organizations essential to building power and advancing climate equity in Ohio.

The Climate and Clean Energy Equity Fund is inviting proposals from qualified consultants to conduct a detailed assessment of the philanthropic landscape for investments to advance climate equity in Ohio, and to contribute recommendations on grantmaking opportunities that would advance the Equity Fund's theory of change in the state. We are also searching for a consultant to lead a field assessment in Ohio and contribute informed recommendations during this assessment period.

The Equity Fund will consider applications for consultants to either conduct both funder and field assessment scopes of work, or to exclusively conduct the funder landscape scope of the project detailed in this RFP.

#### **Objective of the Funder Landscape Assessment:**

- Assess Philanthropic Interest and Capacity to Make Aligned and or Direct Investments in the Equity Fund's approach to advancing Climate Equity in Ohio

#### **Activities to be included in the proposed scope of work:**

- **Stakeholder Engagement**
  - Interview philanthropic entities who are currently investing in climate, environment, and/or civic engagement in Ohio
  - Hold exploratory conversations with entities who are not currently invested in Ohio but have the capacity and potential to contribute to an aligned funding strategy in the state
  - Design agenda and manage the logistics to execute a funder convening or series of convenings that share landscaping insights, builds interest in coordinated climate equity investments, and contributes to The Equity Fund's future funding relationships in Ohio

- **Collaborative Analysis**
  - Work with consultants and Equity Fund staff to gather data and identify funding opportunities that address gaps in support from philanthropic partners to underfunded communities
  - Document and analyze findings on the current and future funding potential in the state, informed by funder landscaping interviews
- **Strategic Recommendations**
  - Present findings and recommendations to senior leadership of The Equity Fund
  - Incorporate feedback from the staff presentation into a report of the findings
  - Support Equity Fund staff in their presentation of findings to philanthropic partners

The Equity Fund will:

**1. Provide Context**

- a. Provide organizational background information and context to the Consultant as necessary to perform the Services outlined above.

**2. Regular Communication**

- a. Commit to regular communication between Equity Fund staff and the Consultant to manage the details of this scope of work and provide regular feedback on work in progress.

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**Term**

The term of the statement of Work will commence on Feb 24, 2025 and continue until May 30, 2025 .

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**Qualifications**

Candidate must be able to demonstrate:

- Proven experience in leading complex, multi-stakeholder initiatives
- Strong analytical skills
- Familiarity with the philanthropic sector
- Excellent verbal and written communication and project management skills
- Alignment with the values and priorities of the Equity Fund

- Deep understanding of the environmental/climate advocacy landscape in Ohio, and funder relationships supporting the organizing infrastructure in the state

Preference for candidates who can also demonstrate:

- Relationships and experience aligning philanthropy towards equitable, coordinated investments
  - Previous experience developing grant recommendations and/or large-scale advocacy campaign plans
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### **Proposal Requirements**

Interested applicants should submit:

1. **Cover Letter & Resume**
    - Highlight relevant experience and approach to the project.
  2. **Technical Proposal**
    - Detailed methodology and timeline for achieving the objectives and activities
  3. **Time Estimate**
    - An estimate of hours or days required to perform the work, and an hourly or daily consulting fee
  4. **Cost Estimate**
    - A proposed fee for services cap, and a reimbursable expenses cap
  5. **References and Examples of Previous Work**
    - Contact information for at least two references familiar with the applicant's work
    - Examples of past projects with similar scope
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### **Evaluation Criteria**

Proposals will be evaluated based on:

- Alignment with project goals and objectives
  - Experience and qualifications of the consultant
  - Feasibility and clarity of the proposed methodology
  - Cost-effectiveness
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## Timeline

- **RFP Release Date:** Jan 27, 2025
  - **Proposal reviewed on a rolling basis with preference given to proposals submitted by:** Feb 10, 2025
  - **Project Work:** February - May 2025
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## Submission Details

Please send proposals to [malavika@theequityfund.org](mailto:malavika@theequityfund.org) by Feb 10, 2025 . For any questions or additional information, contact Malavika Sahai, Philanthropic Advocacy Coordinator at [malavika@theequityfund.org](mailto:malavika@theequityfund.org).

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