

Request for Proposals
Racial Equity Initiative

RFP Summary

Self-Help is seeking a consultant with expertise in organizational racial equity to assist us in examining our practices as we hone our strategies and implement changes that will help us achieve our vision of a more equitable, inclusive and impactful Self-Help.

See the following pages for background on our racial equity work so far and details on the scope of work for the engagement.

Timeline and process

Proposals are due on December 14, 2020.

Finalists will be asked to connect with Self-Help for an interview with a small committee of folks, to be scheduled in December or early January.

We hope to have a decision and signed agreement with the winning consultant by mid-January 2021. Ideally, we would begin working with the consultant soon after, but we do understand that many consultants are already booked well into 2021. We are willing to work around availability for the right consultant.

Submissions

Please submit proposals in PDF format to Purvi Patel at ppatel@self-help.org by December 14, 2020. If that deadline presents an issue for you, please let us know; extensions may be possible.

Thank you for your interest!

Request for Proposals ***Racial Equity Initiative***

Project Overview

As part of Self-Help’s commitment to achieving the racial equity that rightfully belongs in our organization, we must continue in our journey to be an anti–oppressive¹ workplace. Doing so is an important priority supported by our leadership, as our mission focuses on economic justice with its roots connected to the Civil Rights Movement. We are intentional in our ongoing commitment to racial equity that is needed for us to “walk the talk” of our mission and values, both internally and externally.

Self-Help is seeking a consultant with expertise in organizational racial equity to assist us in examining our practices as we hone our strategies and implement changes that will help us achieve our vision of a more equitable, inclusive and impactful Self-Help.

The ideal consultant is required to have experience working with leaders of varied racial/ethnic backgrounds who have differing levels of knowledge and experience with these topics. We seek a partner who can provide a strategic vision, multi-cultural competency, have intersectional approaches, expert facilitation techniques, and the flexibility and perseverance necessary to ensure program goals are met. Knowledge of and/or experience with the role of financial institutions in moving forward the goal of economic justice is necessary.

Background

Self-Help is a family of five nonprofit organizations. Since its founding in 1980, Self-Help (Center for Community Self-Help) has grown to include two credit unions (Self-Help Credit Union and Self-Help Federal Credit Union), a real estate development and loan fund (Self-Help Ventures Fund) and a research and policy affiliate (Center for Responsible Lending). Our mission is creating and protecting ownership and economic opportunity for all, especially people of color, women, rural residents and low-wealth families and communities.

We fulfill our mission by providing responsible financial services, lending to small businesses and nonprofits, developing real estate, and promoting fair financial practices. While our work

¹ [1] The term “anti-oppressive” is used to capture the many ways in which inequity shows up across lines of difference, including but not limited to race, religion, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression (including transgender status), age, sexual orientation, military and veteran status, class, or family status. We desire an organizational culture that actively roots out all forms of oppression.



benefits communities of all kinds, our focus is on those who may be underserved by conventional lenders.

We work every day to expand ownership and economic opportunities for all. The mission is large, but we believe that much of it is accomplished by small acts: a member's first bank account. A loan for a small business. Helping families buy their first car or first home or reduce high-cost debt. Together with more than 170,000 members around the country, we are increasing ownership, creating jobs, revitalizing neighborhoods, and building stronger communities. Find out more [about us](#) and [what we do](#).

Self-Help employs 790 worker-members in over 60 locations. Over 60 percent of our staff work for our credit union divisions; many of these staff are member-facing. People of color are the majority at Self-Help—61 percent so identify. We have several internal affinity groups and a small group of staff has been engaged in many years of voluntary learning about anti-racism and cultures of supremacy and dominance. Other disparate efforts have been taking place across the organization, and our goal is to bring these together with an overarching strategy.

Scope of Work

We hope that this work will include four major components:²

- **Foundational Analysis:** It is imperative to document and clearly articulate *why* the organization cannot fulfill our mission unless we all learn how to lead on issues of racial equity and build the skills necessary to effectively work across cultural difference. We would like help articulating this analysis.
- **Organizational Assessment:** Help guide us as we get more detailed information about the existing gaps in learning and practice, so we can develop relevant skill-building plans and interventions. Possibilities include a survey of staff, facilitated discussions and reflections, policy assessments, and interviews or a survey of external members and partners. Also, help us identify what data we want to collect and insight of who should monitor ongoing progress.
- **Learning:** We are looking for effective advice regarding our racial equity curriculum/training plan, which is currently being developed and will impact all staff members.
- **Implementation:** We hope that the consultant can help us develop an overall strategy for improving both *how* staff work together and *what* the actual work is. We hope to:
 - Consider changes to our internal policies and practices and to our programs;
 - Help incorporate a culture of transparency to ensure equitable practices can be made visible to all;

² McGhee, H., Mayo, L, & Park, A. November 2018. "Demos' Racial Equity Transformation: Key Components, Process & Lessons. *Demos*. Available at <https://www.demos.org/research/demos-racial-equity-transformation-key-components-process-lessons#Attachments>.



- Institutionalize the work by creating a framework for accountability, support, and ongoing data collection; and
- Develop plans and processes for team-level racial equity efforts.

Our intention is to set up a structure that can be self-sustaining after the consultant's work is done. Moving this vision forward will require our collective patience, understanding, time, and resources as our leaders and staff work iteratively for systemic change. Most of all, we want a consultant to help us develop, document, and implement an overall strategy to center racial equity both internally and externally and to ensure equitable outcomes.

We are hoping to build a relationship with a consultant that will ideally begin in early 2021 with benchmarks after six months of work with potential for extension based on our organizational needs and the consultant's offerings and availability.³ This work will likely be virtual due to COVID-19, will involve one-on-one and group meetings, and will involve staff across the country (and in different time zones). If the COVID-19 crisis subsides during our work together, we hope that in-person meetings could become an option across the country.

Proposal Requirements

The proposal, transmitted as a PDF file, must contain the following elements:

- A cover letter providing context about the facilitator's previous work and qualifications, along with primary contact information (phone number and email address);
- Information on your project approach, style, and/or examples of past work; and
- A proposed schedule and budget: Proposals should include the proposed work schedule, timeline, and the estimated cost for all work related to tasks and deliverables.

A group of staff at Self-Help will evaluate each submission, interview finalists, and recommend a consultant to the organization's leadership team. Submissions will be evaluated based on criteria such as related work experience, approach, proposed budget, and references. The contract will be awarded to the applicant that best meets the evaluation criteria. Self-Help reserves the right to negotiate cost and scope elements with the selected applicant.

Proposal Submissions

Submissions are due no later than 5pm on December 14, 2020. If that deadline presents an issue for you, please let us know; extensions may be possible. **Please submit via email to Purvi Patel at ppatel@self-help.org.** Inquiries may be directed to the same email address.

³ We are willing to move the timeline back if the consultant is unable to start work until after early 2021.