Supporting Diverse Environmental Leaders in California
Request for Proposals—Phase 1: Develop Advisory Board and Finalize Initiative Design
Proposals Due November 23, 2020

The David and Lucile Packard Foundation and the William and Flora Hewlett Foundation seek a project manager or project management team experienced in complex project management, facilitation, supporting racial equity, and developing support for diverse leaders to facilitate the first phase of a multi-year initiative, called the Environmental Leadership Initiative (ELI), aimed at elevating, connecting, and investing in diverse leaders working across environmental issue areas in order to build increased community influence toward healthier communities and environment in California.

Background and Context
The Packard and Hewlett Foundations strive to support grantees in achieving ambitious climate, ocean, rivers, and land conservation goals for the benefit of healthy communities and ecosystems in the United States and globally.

Here in California, we want to ensure that the communities most impacted by environmental injustices are at the forefront of efforts to address climate change and other threats to our oceans, rivers, and lands. We believe that change will only be achieved if leaders from those communities are playing leadership roles -- creating and implementing the solutions to vexing (often, interconnected) environmental and social challenges in our state.

Initiative Design
There have been several key inputs into the design of the Environmental Leadership Initiative to date:
- A scoping and research phase was conducted by consultants. This work concentrated on interviews with a broad range of leaders in California including diverse nonprofit leaders, emerging leaders, representatives from California Tribal Nations, philanthropic leaders, and leadership experts.
- An intermediary was selected to further the design phase and engaged with a group of diverse leaders from across the state to inform the design. These leaders gave direct input into the needs and opportunities of this initiative.

We currently have a draft proposed structure, informed by this input, for the Environmental Leadership Initiative, which includes the following core components:

Overarching goal of the Environmental Leadership Initiative
To invest in the leadership of diverse leaders and their organizations, seeking to elevate and secure their diverse leadership, connect leaders across sectors, and invest in skill-building to support leaders to serve as change-agents for California’s communities and environment.
Design Highlights of the Environmental Leaders Initiative:

1. Initiative will support and facilitate the leadership of approximately 60 diverse leaders (in cohorts of 10-20). A cohort may include leaders from California indigenous communities, community based organizations, and large environmental organizations with a significant presence in California. Leaders will be dedicated to working on environmental issues, though they may be sitting at an organization that works on a range of issues. In addition, the cohort will represent the diversity of the state and communities of California.

2. Initiative will provide each leader with flexible support for professional development of their choosing.

3. Initiative will provide multi-year flexible funding to organizations of participating leaders (whose organizational structures can accept grant funds).

4. Initiative will provide support and engagement of alumni to keep the cohorts connected and provide opportunities for collaboration over time.

5. Initiative will be informed by an Advisory Board of diverse leaders from across sectors and California communities.

6. Initiative will include ongoing, formal monitoring and evaluation and feedback mechanisms.

Beyond the opportunities for network development and peer support, the Initiative will offer foundational curriculum and responsive skill-building informed by the needs and interests of a given cohort. These details will be developed through collaboration between the project manager and Advisory Board, and in consultation with participating cohort leaders.

RFP respondents who are selected as finalists can request scoping materials from the earlier stages of the project.

Scope of Work for Launch of Environmental Leadership Initiative

The launch of the Initiative will occur in two phases:

**Phase 1: Develop Advisory Board and Finalize Initiative Design:** The selected project manager will work with existing advisors to the project to recruit the Advisory Board. The project manager will then work with the Advisory Board to further refine how the Initiative will be implemented, detail the foundational curriculum, and prepare the Initiative for launch. (Phase 1 further detailed below.)

**Phase 2: Launch and Manage Initiative:** Based on the finalized design of the cohort, the project manager will launch the initiative and manage the various components of the project, including: collaboration with Foundation staff, ongoing Advisory Board management, cohort recruitment, initiative implementation, communications, alumni engagement, etc. (Phase 2 further detailed below.)
Through this RFP, the Foundations aim to select a project manager or team which will carry out Phase 1 of work. It is possible the project manager, or some members of the project team, will be well positioned to carry out Phase 2 - the launch of this initiative - but this will be determined through the first phase and in partnership with the Advisory Board. **The response to this RFP should focus on the first phase of work.**

**The Phase 1 Scope of Work will include:**

1. **Design and Formalize Advisory Board:** Working with the Foundations and in partnership with the existing advisors to the initiative, design and document the formal structure of the Advisory Board, including governance and decision making responsibilities, followed by recruitment of additional Advisory Board members, if appropriate. The Advisory Board is envisioned to include and grow from the current advisors of the initiative.

2. **Launch and Convene Advisory Board:** Build relationships, trust, and working relationships among Advisory Board members.

3. **Refine Initiative Design:** Convene and collaborate with the Advisory Board and Foundation staff to finalize the scope of the Environmental Leadership Initiative, including leader selection criteria and recruitment, and details on foundational curriculum and responsive skill building approach. This will include working with Foundation staff to finalize structure for the re-granting funds.

4. **Recruit Key Team Members:** Work with Foundation staff to recruit key partners for the initiative, including communications and evaluation partner/s.

5. **Communication with Foundations:** Project Manager or team will have regular communication with Foundation staff throughout Phase 1, including brief written updates provided monthly, and regular check-in phone calls.

**The Phase 2 Scope of Work** will be informed by the results of Phase 1, and will focus on the launch and implementation of the initiative over a 4-6 year period. Responsibilities for the project manager and public charity selected to carry out Phase 2 will include:

1. **Develop Initiative Materials,** as appropriate, which could include a website and other virtual connection resources.

2. **Develop** the recruitment and selection process of the first cohort.

3. **Publicly Launch the Initiative** as defined in the previous step and implement it over the course of the Initiative period (4-6 years), including managing regional partners and subcontractors to support implementation, including skill building offerings.

4. **Manage ELI Day-to-Day,** including facilitating the leadership of the Advisory Board, communication with Foundation staff, and conversations with key stakeholders.

5. **Manage the Initiative Budget,** providing Foundation staff with monthly written updates on progress against budget goals.

6. **Collaborate** with the evaluator, who will be Foundation-selected, with input from project manager and Advisory Board.
**Project Manager Qualifications**

The Foundations are seeking an individual/organization with the following qualifications to serve as project manager for Phase 1 of the Initiative:

**Project management expertise:**
- Has significant experience designing and implementing complex projects, including leadership and/or capacity building initiatives of similar scope and scale, including those with network development and collaboration outcomes.
- Continually is able to hear, reflect, and act on feedback regarding identity and equity with the aim to learn.
- Has demonstrated success in facilitating complex processes in a virtual environment.
- Has superb facilitation skills.
- Has demonstrated experience in establishing feedback loops and making initiative adjustments based on evaluative feedback.
- Has strong analytical skills and ability to think “outside the box” and is not wedded to a specific approach to supporting diverse leaders.
- Has an attitude of partnership and team building, and ability to work collaboratively with the funders, Advisory Board, consultants, evaluator, and the cohort leaders, and a desire to learn and improve as the project unfolds.
- Is highly organized and flexible.
- Has access to a wide range of trainers and consulting experts to draw on for various components of the Initiative, and has experience managing and evaluating such experts.
- Has experience working with a range of organizational types and sizes, especially community based organizations.

**Centers racial equity in their work:**
- Has experience serving and supporting diverse leaders, and leading work that addresses issues of systemic racism and oppression.
- Has experience or knowledge of the indigenous history of California and the development of the environmental justice movement in California.
- Has racial equity and inclusion experience, skills, and values. Deeply believes that racial equity and social justice are important and is driven to act on this belief.
- Recognizes ways that race and other identities intersect and play out in the work, especially within the communities of California.
- Understands the historical context for racial inequity, and its present-day implications.

**Can administer a complex project:**
- Understands how to structure support for diverse leaders and organizations to meet federal and state legal requirements, and/or is willing to work with foundations’ Legal counsel to do so.
• Has necessary operational capacity (or partnerships) to deliver the Initiative, including the ability to receive a grant, pay honoraria, and manage sub-contractors.
• The project manager can be an individual, a single organization, organizations working in partnership, or a set of individuals with a track record of working together.

Location and experience in California:
• The project manager should be based in or have staff working in California, and the individual serving as lead on this project must be based in California full-time.
• Has a track record working in California. Specifically, experience supporting the environmental sector in California would be a plus.

Proposal Submission Guidelines
Responses to this RFP for a project manager for Phase 1 of the Environmental Leadership Initiative are encouraged to keep proposals to five pages, which may be submitted as slides or narrative. Key information to include:
• Overview of team and organization. Brief description of individual/organization, relevant expertise, services offered, experience with projects similar in nature and scope, professional networks of service providers or subcontractors who may be tapped to support this work, and why the individual/organization is interested in this project. Please also include information on organizational structure. Additional information may be included as attachments (see below).
• Work plan and timeline. Describe proposed methodology and tasks for Phase 1 and when they will be completed. Describe how Phase 1 will lead into Phase 2 and how the project will be set up for a successful launch in Phase 2.
• Challenges and concerns. Describe any challenges or concerns you may have about this project.

Attachments (No page maximum on attachments, but brevity is appreciated):
• Phase 1 project budget with narrative detail. Specify anticipated hours of work and fees/rates for the project lead and any key team members (please specify level). A draft implementation budget developed during the scoping phase is available during Phase 1 as a reference.
• List of key people and experience and capacity. Please provide brief biographies of key staff that will work on the project. Describe roles in the project and include resumes/CVs if available.
• Examples of relevant projects. Please provide one or two products demonstrating past experience working on projects of similar scope and scale.
• Two references. Please provide contact information of two previous or current partners who could provide a reference.

Proposal Deadline and Submission Instructions
• Responses to this RFP are due no later than November 23, 2020. Proposals will be reviewed by the Foundations and a set of advisors to the initiative. Finalists will be
invited to interview with the Foundations and external advisors in December. Selection will be complete by January/February 2021.

Please email your proposal documents by noon PDT on November 23, 2020, to Yisroel Quint at YQuint@packard.org. This is an open RFP and please feel free to forward and share this RFP with others in your network who may be interested in this opportunity. Please feel free to reach out to Yisroel with any questions or document requests. An informational call to answer any questions will be held on November 10th at 11 am Pacific. Please RSVP to Yisroel to receive call-in information.