



Draft Request for Investment (RFI) Section: Organizational Capacity and Commitment to Racial Equity, Diversity and Inclusion

Introduction

Staff have begun preparing the template for the Request for Investment (RFI) and present a draft of one section of the RFI for consideration, discussion and public testimony. We hope to solicit public comment on this draft, incorporate feedback into the draft, and bring it back to the committee for further discussion and/or approval on June 3. Publication of the RFIs is planned for September 2019. **The proposed revisions collapse/combine two formerly separate sections on organizational capacity and cultural responsiveness into one section focused on the *applicant organization* and the extent and depth of its policies, practices and results related to racial equity, diversity and inclusion.** The new, one section is proposed worth 36 points. Staff anticipates that the RFI sections on Proven Program Design & Effectiveness, and on Program Budget/Budget Narrative/Cost Effectiveness, will remain as separate RFI sections and will bring re-drafts of these sections for consideration at the June 3 meeting. For previous RFI sections, see <http://www.portlandchildrenslevy.org/grants/grant-application-archive>

Rationale for Proposed Changes

1. Alignment with City-wide equity goals. The city adopted three equity goals in 2015 (after the last PCL competitive funding round), and PCL seeks to assure we are advancing these goals in our grantmaking process, community engagement practices and internal operations. PCL staff acknowledge our lack of diversity (all PCL staff identify as white) and are striving toward cultural humility and responsiveness. In addition to changes to grantmaking process for the next funding round, PCL has created and Affirmative Action Plan, and is in the process of creating an Equity Plan.

2. PSU Recommendations. Proposed changes to the RFI aim to honor the intent of PSU's recommendations (from process improvement review they conducted) to award more points to applicant *organizations* with greater commitment, experience and results in racial equity, diversity and inclusion, and to those whose clients, staff and board are majority of color. The changes eliminate the focus on cultural specificity, do not incorporate PSU's bonus point recommendations. The standard for demographic reflectiveness of staff and board as majority people of color is as PSU recommended.

3. Community Engagement Recommendations. These recommendations aim to reflect community preference for services delivered in ways that prioritize racial equity, diversity, inclusion, cultural responsiveness and that service providers reflect the culture and language of service users.

4. Other Funders' Focus on Organizational Commitment to Racial Equity, Diversity, and Inclusion. Conversations with other funders, and review of other funders' applications demonstrated a focus on organizational commitment to EDI, reflectiveness of staff and board (judged differently by different funders), if/how service providers truly involve communities served in service design/improvement, and whether/how service providers are accountable to communities served.

5. Point Spread in 2014 Scores. In 2014 funding process, 91% of applications scored 8 or more (out of 10 points) on the former organizational capacity section. Conversely, the score range was far greater on the Culturally Responsive Programs/Organizations section: 70% of applications scored 19 or more, while 12 applications were eliminated for scoring 15 or less. The proposed revisions seek to increase the types of questions that offered reviewers more options for discernment in scores, and therefore more likely affect which applications are eventually funded.

I. Organizational Capacity and Commitment to Racial Equity, Diversity, and Inclusion (36 points)

The City of Portland has adopted 3 goals focused on advancing racial equity:

- We will end racial disparities within city government, so there is fairness in hiring and promotions, greater opportunities in contracting, and equitable services to all residents.
- We will strengthen outreach, public engagement, and access to City services for communities of color and immigrant and refugee communities, and support or change existing services using racial equity best practices.
- We will collaborate with communities and institutions to eliminate racial inequity in all areas of government, including education, criminal justice, environmental justice, health, housing, transportation, and economic success.

The city's definition of equity, which PCL honors, is "Equity is achieved when one's identity cannot predict the outcome."

In addition, one of PCL's goals is to reduce racial disparities in children's outcomes and advance racial equity in children's well-being and success. PCL recognizes that organizations founded with the purpose of racial equity and social justice, with extensive experience and deep commitment to racial equity, are best positioned to help the City and PCL meet its goals.

PCL values racial equity, diversity and inclusion among the children served by the programs it funds. In order to support its values and assure that all programs supported through PCL will help PCL and the city meet its equity goals, PCL will fund organizations with extensive capacity, grounded in racial equity, diversity, and inclusion, to successfully serve children and families most affected by racial inequities and injustice.

PCL understands that organizations are on a continuum of growth and development in their work on racial equity, diversity, and inclusion. Organizations with a longer history and commitment to this work and greater evidence of their experience with racial equity, diversity, and inclusion, including highly culturally responsive service delivery, will earn more points in this section of the application.

Please answer all subparts and label your responses to correspond to the appropriate subpart. x- page maximum narrative; xx-point font; Exhibit X, Table X separate from narrative. Applications must receive a minimum of 23 points, out of 36 total, in this section to be considered for funding.

A. Organization History and Purpose

Provide a brief summary of the organization's purpose based on its vision, mission, values and history. Describe how those features of the organization reflect its commitment to racial equity, diversity, and inclusion.

B. Leadership and Strategic Direction

Briefly summarize the organization's current strategic plan and its relationship to serving children and families, including the time-period of the strategic plan. Explain how the organization's strategic plan advances the organization's commitment to racial equity, diversity, and inclusion. Describe role and responsibilities of organizational leadership in carrying out the racial equity, diversity, and inclusion objectives in the strategic plan.

C. Staff Recruitment, Retention, Promotion and Training; Board Training

- Describe the organization's efforts to recruit, prepare/train, retain and promote staff to work successfully within the organization.
- Describe how the organization attracts and retains staff who reflect the population served by the organization. Explain how the organization builds its workforce from the populations that it serves.
- Describe how the organization trains staff around issues of racial equity, diversity, and inclusion, including how staff are trained to deliver culturally responsive services to the cultural groups it serves. Describe the impact of training on service delivery.
- Describe any cultural responsiveness and racial equity, diversity, and inclusion training the organization provides for the board of directors. Describe the impact of the training on the organization.

You may reference Table x in your narrative explanation as needed.

D. Language Accessibility

Describe the organization's efforts to provide effective language accessibility to the populations it serves. Describe how the organization evaluates the quality and effectiveness of the interpretation and translation it offers to clients. You may reference Table x in your narrative explanation as needed.

E. Service User Voice and Influence

Describe how the organization seeks and integrates service user voice to understand clients' needs and solutions to meet their needs. Describe how service user voice informs the organization's understanding of racial equity, diversity, and inclusion. Describe the organization's greatest accomplishment in the past two years integrating service user voice into its work.

F. Community Engagement and Collaboration

Describe how the organization engages authentically and collaborates with community leaders and community-based organizations that represent the interests of the population(s) it serves. Describe how these relationships advance the organization's commitment to racial equity, diversity, and inclusion.

G. Achievements and Accountability

Describe how the organization holds itself accountable for racial equity, diversity, and inclusion with the populations it serves. Describe the organization's most significant achievement in advancing racial equity, diversity, and inclusion within the organization, and in Portland.

H. Demographics Characteristics of Organization's Clients, Staff and Board Members

Complete Table x, Exhibit x per the instructions below. Please refer to the definitions in Exhibit x prior to completing the table.

- **Clients served by the Organization:** enter the actual number for an annual period of ALL unduplicated clients served (i.e. children, adults, or both) served by the organization and the corresponding demographic data. Please use an annual period ending on or as close to June 30, 2019 as possible.
- **Direct Service Staff:** enter the actual number of direct service staff (those that work directly with clients) in the organization as of June 30, 2019.
- **Management Staff:** enter the actual number of management staff (those that supervise direct service staff and all other executive management) in the organization as of June 30, 2019.
- **Board of Directors:** enter the actual number of board members as of June 30, 2019.
- **Note:** You may add additional demographic variables as additional rows if you choose, but please do not add additional columns. Additional demographic variables may include any other uniquely identifiable population.

Describe methods the organization used to arrive at the numbers provided in Table X.

I. Organizational Capacity and Commitment to Racial Equity, Diversity, and Inclusion Possible Points: 36

For Maximum Points for each subsection, responses include the following elements:		Score per Subsection
A. Organization History and Purpose: up to 4 points		
<ul style="list-style-type: none"> Organization history, mission, vision, and values show dedication and experience serving children and families, and indicate the organization working toward racial equity, diversity, and inclusion. (2 points) 	___ Points	
<ul style="list-style-type: none"> Organization history, mission, vision and values all show strong commitment to racial equity, diversity, and inclusion for children and families. (2 points) 	___ Points	
Reviewer Notes:		
B. Leadership and Strategic Direction: up to 3 points		
<ul style="list-style-type: none"> Organization has a current strategic plan that includes its services for children and families. (1 points) 	___ Points	
<ul style="list-style-type: none"> Organization's current strategic plan has clear objectives that advance the organization's commitment to racial equity, diversity and inclusion. (1 point) 	___ Points	
<ul style="list-style-type: none"> Organizational leadership, including Board of Directors, have clear roles and responsibilities for the racial equity, diversity, and inclusion objectives in the plan. (1 point) 	___ Points	
Reviewer Notes:		
C. Staff Recruitment, Retention, Promotion and Training; Board Training: up to 8 points		
<ul style="list-style-type: none"> Has clear practices for recruiting, preparing/training, retaining, and promoting staff to work successfully in the organization. (2 points) 	___ Points	
<ul style="list-style-type: none"> Has successful strategies to recruit, retain and promote staff that reflects the diversity of clients served by the organization. Has developed and sustained efforts to build its workforce from the populations it serves. (2 points) 	___ Points	
<ul style="list-style-type: none"> Staff, including Management, receive ongoing training on cultural responsiveness, racial equity, diversity and inclusion; organization describes how the training has clearly had a meaningful impact the cultural responsiveness of service delivery. (2 points) 	___ Points	
<ul style="list-style-type: none"> Organization provides training on cultural responsiveness, racial equity, diversity and inclusion to Board of Directors; describes how the training has had a meaningful impact on the organization and its work. (2 points) 	___ Points	
Reviewer Notes:		
D. Language Accessibility: up to 4 points		
<ul style="list-style-type: none"> Describes multiple practices to make services accessible to service users in their native language, including translation of written materials, interpretation during service delivery, and other ways to assure communication is accessible to service users in multiple formats. Evaluates the quality and effectiveness of the interpretation and translation services provided and demonstrates high quality and effective interpretation services. (2 points) 	___ Points	
<ul style="list-style-type: none"> Has strategies for hiring and retaining staff that speak the language(s) of clients served by the organization. Direct service staff speak many of the languages spoken by clients served. (2 points) 	___ Points	
Reviewer Notes:		
E. Service User Voice and Influence: up to 4 points		
<ul style="list-style-type: none"> Uses multiple methods on a regular basis across the organization to solicit service user feedback, such as focus groups, surveys, interviews, and/or community advisory groups. (1 point) 	___ Points	
<ul style="list-style-type: none"> Demonstrates how the organization has shaped its service offerings and priorities based on clients' stated needs and solutions to meeting their needs. (1 point) 	___ Points	

<ul style="list-style-type: none"> Greatest accomplishment clearly demonstrates deep, ongoing involvement of service user voice in the organization’s work, and advancing racial equity, diversity and inclusion. (2 points) 	___ Points
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Reviewer Notes:

F. Community Engagement and Collaboration: up to 4 points

<ul style="list-style-type: none"> Has established, ongoing collaborations or partnerships with community leaders and/or community-based organizations that represent or serve the interests of the population served. Evidence provided includes partnerships that have been in place for at least 2 years or longer, and may include responsibility for shared outcomes between partners, shared budget and funding for service delivery, mutually beneficial advisory or advocacy roles. <p>(2 points)</p>	___ Points
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<ul style="list-style-type: none"> Collaborations and partnerships with community leaders and community-based organizations clearly advance the organization’s commitment to racial equity, diversity, and inclusion. (2 points) 	___ Points
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Reviewer Notes:

G. Achievements and Accountability: up to 3 points

<ul style="list-style-type: none"> Describes robust approaches for holding itself accountable for racial equity, diversity, and inclusion such as annual reporting and analysis of demographic data of clients served and staff/board composition, annual reporting and analysis of program outcome data, maintaining ongoing community advisory committees, and organizational leadership acting in response to these sources. Demonstrates significant achievement in meeting its own organizational goals for racial equity, diversity, and inclusion, and meaningfully advancing racial equity, diversity, and inclusion. Most significant achievement in advancing racial equity, diversity, and inclusion in Portland has made a substantial difference in the lives of children and families. <p>(3 points)</p>	___ Points
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Reviewer Notes:

H. Demographics of Organization's Clients, Staff and Board Members: up to 6 points

<ul style="list-style-type: none"> The demographics of the clients served by the organization indicate the organization prioritizes racial equity, diversity and inclusion. (1 point) 	___ Points
<ul style="list-style-type: none"> 51% or more of clients served by the organization last year identify as a person of color. (1 point) 	___ Points
<ul style="list-style-type: none"> 51% or more of direct service staff identify as a person of color. (1 point) 	___ Points
<ul style="list-style-type: none"> 51% or more of management service staff identify as a person of color. (1 point) 	___ Points
<ul style="list-style-type: none"> 51% or more of board of directors identify as a person of color. (1 point) 	___ Points
<ul style="list-style-type: none"> Organization’s methods for collecting the demographic data in Table X indicate the data are gathered directly from clients, staff, and board members, rather than estimated by organization staff. (1 point) 	___ Points

Reviewer Notes:

Organizational Capacity and Commitment to Diversity, Equity, and Inclusion
TOTAL Score: ___ out of 36 Points Possible

DRAFT (Table X to RFI excerpt): Demographics of Organization's Clients, Staff and Board Members

Name of Applicant Organization:				Name of Program:						
	# of Total Clients served by Organization	% of Total Clients served by Organization	# of Organization Direct Service Staff	% of Direct Service Staff	# Organization Managem't Staff	% Managem't Staff	# of Organization Board of Directors	% of Board of Directors	PROPOSED PROGRAM: Total Number of Children to serve	Total Number of Parents or Caregivers to serve
Total Unduplicated Numbers										
									Percent of Total	Percent of Total
1. Gender	0	0%	0	0%	0	0%	0	0%	0%	0%
Male										
Female										
Transgender										
Genderqueer										
Did Not Specify										
2. Race/ Ethnicity	0	0%	0	0%	0	0%	0	0%	0%	0%
Latino/Hispanic										
African American										
African Immigrant/Refugee										
Native American/ Alaska Native										
Native Hawaiian/Pacific Islander										
Asian										
Eastern European Immigrant/Refugee										
Multiracial/Multiethnic										
White										
Did Not Specify										
3. Primary Language in Home	0	0%	0	0%	0	0%	0	0%	0%	0%
English										
Spanish										
Vietnamese										
Russian										
Chinese (Mandarin, Cantonese, etc)										
Other (specify)										
Other languages										
Did Not Specify										
4. Disability	0	0%	0	0%	0	0%	0	0%	0%	0%
Has Disability										
Did Not Specify										
5. Immigrant/Refugee	0	0%	0	0%	0	0%	0	0%	0%	0%
Identifies as Immigrant/Refugee										
Did Not Specify										