

DOGWOOD HEALTH TRUST: UNDERSTANDING AND REFINING THE LEVERAGE FUND APPROACH THROUGH KEY STAKEHOLDER FEEDBACK

REQUEST FOR PROPOSALS

The Dogwood Health Trust’s Community Equity Team seeks to support organizations’ ability to achieve equitable outcomes for underserved and marginalized communities in Western North Carolina by investing in innovative concepts, cooperative partnerships, and customized support addressing systemic imbalances that burden those who are historically marginalized. Our vision is for a robust social sector that powerfully advances equity and progress in the Qualla Boundary and the 18 counties in Western North Carolina. We are working towards a region where every Western North Carolinian has the opportunity to live, learn, earn, and thrive – no exceptions.

A vital component of the Community Equity Team is Dogwood Health Trust’s Leverage Fund. Every year, federal and state agencies distribute billions of dollars to nonprofit organizations and local governments to support or expand their work. Millions more are available from national charitable foundations. The Leverage Fund gives community-based organizations a leg up in the application process for federal and state funders, as well as national foundations. Through the Leverage Fund, Dogwood Health Trust underwrites the services of professional, experienced grant writers to help individual organizations, collaboratives, neighborhoods, and other organized networks pursue funding from national and state sources.

As the Leverage Fund begins its fifth year of operation, it is seeking to further understand the experiences of nonprofit organizations who have received support through the Fund. A key aspect to this work is better understanding how the Leverage Fund can strengthen its support of BIPOC-led and equity centered organizations. Throughout 2024, the Community Equity Team will be drafting a 2025 – 2030 strategy for the Leverage Fund. This feedback will directly inform both strategy and implementation.

Project Background and Context

Dogwood Health Trust prioritizes the vital role BIPOC-led and racial equity-centered organizations play in achieving change within the Western North Carolina region. These organizations are historically-underinvested – limiting their ability to make greater progress in advancing their vital missions.

Therefore, supporting these organizations will be a central part of Dogwood Health Trust’s work on community equity and understanding their experiences with the Leverage Fund will be crucial to forming a strategy responsive to their needs.

The Community Equity and Leverage Fund Teams are exploring the following interventions and adjustments to the Leverage Fund Strategy to better serve BIPOC and racial-equity centered organizations:

- Creating a more diverse “bench” of grant writers that better represent the organizations and communities being served.

- Expanding services that build grant writing capacity within nonprofit organizations.
- Streamlining Dogwood's internal processes to ensure administrative tasks are not a burden to already time and cash-strapped organizations.
- Broadening the Leverage Fund service definition to provide grant writing support to local funders (instead of only state, national, and government funding sources).
- Increasing outreach and promotion of leverage fund opportunities to BIPOC-led and serving organizations in WNC.

Anticipated Activities

If selected as the consultant, you will work closely with Dogwood Health Trust's Community Equity Team and members of the Learning, Evaluation, and Data Team. We anticipate key activities will include:

- A survey of about 130 previous Leverage Fund participants (including those whose applications to external funders were not successful). We expect descriptive statistics, simple statistical analyses, and qualitative coding of open-ended responses.
- A deeper, qualitative dive (focus groups or interviews), with BIPOC-led and racial-equity centered organizations.
- Individual interviews with key internal stakeholders within Dogwood Health Trust.
- Presentation of key findings to Dogwood staff.

This assessment of the Leverage Fund is intended to provide baseline information that will provide immediate, actionable information to support our teams and grantees, while helping us formulate next steps in developing a longer-term, five-year strategy.

Expected Deliverable

We will work in partnership with the selected consultant to determine the specific format and timing of deliverables. This includes any additional, relevant deliverables above and beyond the list included below. We are aiming to have this work complete in July 2024 and our preference is for survey findings to inform any subsequent interviews and/or focus groups. We anticipate this work will produce the following:

- **Deliverable 1:** Interim Report on Key Survey Themes, including statistical analyses by race, gender, organizational focus, and counties served.
- **Deliverable 2:** Full Report with all survey and interview/focus groups findings, a memo of key findings highlighting cross-cutting themes and recommended next steps.

We ask that all reports be delivered in a user-friendly, accessible format, with clear takeaways and questions to consider.

Required Experience

We welcome proposals from independent consultants, firms, and organization who meet the following qualifications for this role:

- Experience conducting mixed-methods research, including expertise in survey design and interview protocol.
- Knowledge of and experience with strengthening small, nonprofit organizations, particularly in the rural South.
- Experience working with BIPOC-led and racial-equity centered organizations in rural and suburban spaces, alongside a deep knowledge of racial equity. This will include consideration of the composition of consultant teams, including people of color in lead and decision-making roles.

Key Dates and Deadlines

- **Week of March 4th, 2024:** RFP is released to the public
- **Wednesday, March 13th, 2024 and Thursday, March 14th, 2024:** Optional opportunity for 30-minute conversations with Dogwood Project Team
- **Friday, March 29th:** Full proposals due
- **Week of April 8th:** Interviews with Finalists
- **Friday, April 19th:** Project Consultant Determined and Finalists notified
- **Week of April 29th:** Launch project work with Dogwood Health Trust

Please email Hayden Couvillion at h.couvillion@dht.org to schedule an optional opportunity to meet the Dogwood Project Team and to submit your full proposal.

Proposal Format

We request that proposals be formatted as follows.

- **Firm/Consultant Description:** Provide a brief bio or firm description, including geographic location, size of firm, values, approaches to center and advance racial equity, and contact person and contact information for this submission.
 - Please provide 1-2 examples of work that show your interest and experience.
- **Team Overview:** Provide information about relevant experience and a list of proposed team members, including their relevant background.
 - Information about current or past projects similar or relevant to this RFP – e.g., goals, scope, audiences, and approach for past projects, and use or impact of the products of that work.
 - Indicate each team member’s role in the proposed project.
- **Draft Scope of Work:** Provide a high-level description of a proposed process for leading this work, based on the information in this RFP. Include:

- Potential key questions you would ask Leverage Fund participants and internal stakeholders within Dogwood. We recognize these questions will be in draft form and subject to change as your understanding of the project grows.
 - Recommended cadence of meetings with the Dogwood Health Trust team.
 - Suggested timeline for the work.
- **Draft Budget:** We estimate a project budget between \$15,000 - \$25,000. Please provide a budget range and estimated hours for your services associated with the proposed scope. We understand that this is a draft budget that will be collaboratively refined during the contract period.

About Dogwood Health Trust

Dogwood Health Trust wants to help create a Western North Carolina where every generation can live, learn, earn and thrive, with dignity and opportunity for all – no exceptions. To do this, we focus a large portion of our community investments on creating equitable outcomes within four key strategic priorities that intertwine to significantly influence overall wellbeing.

In addition, we support work that weaves through our key strategic priorities, such as community equity, capacity building, leveraging resources and public policy. We work shoulder-to-shoulder with local, state and federal partners and communities toward equitable access to opportunities, resources and support for everyone.

Based in Asheville, North Carolina, Dogwood Health Trust was formed in 2018 from the sale of Mission Hospital. It now has more than 1.5 billion dollars in assets and last year (2023) granted \$78 million dollars to local area nonprofits. For more information, visit dogwoodhealthtrust.org.