



Funders for LGBTQ Issues **Request for Proposals for Strategic Planning Consultancy**

Background on Organization

Funders for LGBTQ Issues (Funders) is the network of U.S. foundations and other institutional funders committed to equity and improved well-being for lesbian, gay, bisexual, transgender, and queer communities. Collectively, our members provide more than \$100 million of the \$200 million in annual foundation funding for LGBTQ issues. Please see www.lgbtfunders.org for more information on our work.

Current Organizational Position and Previous Strategic Plan

Over the past three years, Funders for LGBTQ Issues experienced significant growth and stability:

- Operating revenue grew, from \$2.2 annually to more than \$2.8 million.
- Funders for LGBTQ Issues received a historic \$3 million dollar gift funding from MacKenzie Scott in the most recent round of awards from the philanthropist.
- Membership increased from 70 to more than 85 institutional members, including a growing number of non-LGBTQ-focused foundations.
- The staff expanded from eight full-time staff to eleven full-time staff with all staff working remotely from California, New York, Pennsylvania, and North Carolina.
- The organization welcomed its 4th President in the summer of 2021, Saida Agostini-Bostic.

This expansion in operational scale and stability during the COVID-19 pandemic allowed the organization to achieve and maintain significant growth in its programmatic impact. The most recent strategic plan, developed in 2018, sought to continue and build upon the many effective aspects of our work. At the same time, we identified clear areas for improvement and expansion.

That strategic plan outlined three primary strategies – and an internal one – that sought to transform the culture of philanthropy by advancing change at the three levels: sector-wide, institutional, and individual.

- **Transform the philanthropic sector** to better understand, support, and improve the lives of diverse LGBTQ communities and movements;
- **Catalyze institutional change** within individual foundations to advance internal policies and practices, as well as grantmaking strategies, to more effectively support LGBTQ communities and advance social justice;
- **Empower LGBTQ leadership** in philanthropy by cultivating a village of LGBTQ-identifying people and allies as champions of LGBTQ inclusion, and racial, gender, and economic justice; and

- **Aspire to the highest standards** of a philanthropic network by effectively communicating our work, building a sustainable and healthy organization, and living our values of LGBTQ, racial, economic, and gender justice.

During our collaborative planning process in 2018, it became clear that the essence of our work is the transformation of the culture of philanthropy to be more inclusive of LGBTQ communities both in internal practices and in grantmaking. We recognize that lasting change in philanthropy requires deep engagement and interventions at all three of these levels—and always with a strong racial, gender, and economic justice lens. This framework allowed us to be nimble, flexible, and creative as our communities continue to be impacted by the COVID-19 global pandemic.

Some successes of the last 3 years which align with our previous strategic plan include:

- **Out in the South (OTS) initiative:** OTS continues to exceed our goals, with funding for LGBTQ communities in the South reaching \$31.8 million in 2018—a near eight-fold increase since we first began developing our Southern initiative. Through the Out in the South Fund we've awarded \$2.4 million dollars to funds based in southern communities that are committed to building the capacity of LGBTQ movement work.
- **Grantmakers United for Trans Communities (GUTC) initiative:** launched in late 2017, GUTC has helped increase overall grantmaking to trans communities through its GUTC Pledge campaign. GUTC also provided leadership development and support to 3 cohorts of trans professionals in philanthropy (19 people), some of whom have already advanced to senior and executive leadership levels in the field.
- **Funding Forward**, an annual gathering of grantmakers committed to LGBTQ Issues: Funding Forward brings together leading LGBTQ funders, mainstream funders, and movement leaders to connect with one another, learn from each other, and coordinate their efforts. We continued this process, virtually, in 2020 with over 150 people attending.
- **LGBTQ Philanthropic Research:** As a leading research hub for LGBTQ philanthropy, we continued to address the most pressing issues of the moment. We released special infographics zooming in on LGBTQ communities of color, and we published a COVID-19 Resource Page to aggregate timely information and recommendations for both foundations and grantseeking organizations.
- **LGBTQ Inclusivity Trainings:** The training program launched in January of 2020. We provided 10+ foundations with training and technical assistance on LGBTQ inclusiveness and intersectional racial equity, with a focus on highlighting the racial diversity of LGBTQ communities and the disparities faced by LGBTQ communities of color.

Building on these successes, the organization designated 2022 as an assessment and planning year. This will be an opportunity for Funders to assess the prior strategic plan in greater depth, and to develop a new plan for the next 3-5 years.

Current Strategic Questions

As we move into strategic planning, we want to take this opportunity as an organization to actively reflect on how Funders can lean more boldly into its mission to champion LGBTQ philanthropy. As such, there are several strategic questions that have emerged for us, including:

1. Philanthropic Organizing

We are seeking to actively challenge patterns of white supremacy, racism, transphobia, and other forms of oppression within the philanthropic sector, and introduce more just ways of working with and relating to each other and our wider field of colleagues.

- What should be the next phase of our philanthropic organizing work?
- How can we better engage and organize diverse philanthropic networks and entities, such as mutual aid groups, place-based grantmakers, donor-advised funds, and individual donors seeking to give away intergenerational wealth?
- How should our current research agenda evolve to measure the impact of philanthropic organizing beyond dollars given?

2. Programming

- Given the ongoing multiple pandemics, racial unrest, and political instability within our country, are there ways that Funders should reconceptualize and/or pivot programming to ensure the most immediate needs of Black and Brown TGNC communities are centered?
- What role should Funders play in the public policy landscape related to equity for LGBTQ communities or philanthropic reform at the federal state levels?
- How can our programs best actualize our values? What is our relationship to various geographic regions across the United States and around the globe? How do we sustain our national presence, nurture strong local relationships, and effectively collaborate with members and partners supporting LGBTQI communities outside the United States?

3. Movement Accountability

- What does it mean to be in authentic partnership with social justice movement leaders?
- How do we actively amplify movement leaders without falling into habits that inadvertently reify gatekeeping practices?
- What systems can we put into place to ensure that Funders is accountable to the movement?

4. How We Work Together

- How does our organizational structure serve our mission and purpose? What do we need to shift and change to be in deeper alignment with our mission and values?
- How can we promote the long-term sustainability of Funders, given the shifting and fluid nature of the economy?

- How are we intentionally convening as a staff and board to engage in shared learning, and to push against working in silos?
- How are we practicing continuous learning and understanding of emergent issues within the LGBTQ movements?

5. Values

- When we name values to each other, and our respective communities, how do we work to build a shared and growing understanding, and practice of those values?

Scope of Project

Funders for LGBTQ Issues seeks a consultant (or team of consultants) to facilitate and develop our strategic planning process during 2022. We are seeking consultant(s) able to provide the following key services:

- facilitate and guide the strategic planning process in both virtual and hybrid virtual/in-person settings, including facilitation of meetings of the strategic planning committee as well as the strategic planning retreat and other meetings with key stakeholders;
- conduct research to inform the strategic planning process, with a particular focus on best practices and models for sustainable philanthropic networks and gathering input from key stakeholders (members, LGBTQ funders, potential new funders of LGBTQ issues, LGBTQ movement leaders);
- synthesize and capture findings and options in writing throughout the iterative planning process; and
- complete the bulk of the writing of the actual strategic plan itself, including revisions based on feedback from the strategic planning committee.

Timeline

The planning process will begin in late March 2022 and continue throughout the year, with the likely milestones of holding a strategic planning retreat with all board and staff in late Spring or early Summer and presenting a draft plan to the board at its fall 2022 meeting (likely to be held in mid-Fall).

Required Expertise

- Deep knowledge of philanthropy and funding networks.
- Understanding of the current landscape of the LGBTQ movement and broader field of social justice.
- Experience in strategic planning and facilitation. Ability to creatively engage participants in virtual and hybrid settings.

- Intersectional approach to racial, economic, gender, disability, and class justice

Submitting an Estimate

Please submit a brief estimate outlining the proposed scope of work, a description of your consulting team and their qualifications, and an estimate of all fees and costs. Funders for LGBTQ Issues has budgeted a maximum of \$70,000 for consultant fees, and hope to stay within this range. We also want to provide adequate and equitable compensation, so we will consider proposals that exceed this range. Please include references to 3 organizations you have worked with. Estimates may be emailed to Saida Agostini Bostic, President, at saida@lgbtfunders.org. **Please submit your estimate by January 26, 2022.** We expect to make a decision on a consultant by early March.

Consultants rooted in trans communities, LGBTQ communities of color, and immigrant communities are especially encouraged to submit proposals.