



## INVITATION TO PARTNER ON STRATEGY DEVELOPMENT

*The David Rockefeller Fund invests in catalytic ideas, people, efforts, and institutions working strategically toward ecological regeneration, justice system transformation, and art for social impact.*

The David Rockefeller Fund seeks a thoughtful and loving team to serve as **Strategy Development Partners** to accompany the organization in revising the current direction of our work and recommitting to a strategy that will allow us to be a more just, equitable and diverse funder. Beyond the traditional strategy development consultant role, this is an opportunity to partner with a dedicated Board, Staff, and Donor Family deeply intent on unpacking and reconciling some of the more challenging issues facing today's philanthropic field. The selected team should be willing to:

- Examine the socio, political, economic systems and arrangements that have traditionally provided the underpinnings of formal philanthropy (including intergenerational wealth);
- Explore how issues of power and equity overlap with philanthropic practice and shape the values that drive the practice; and
- Accompany the DR Fund as we identify, define and/or build new models for more just and inclusive philanthropy.

Such exploration is already reflected in some of the Fund's more progressive, participatory grantmaking approaches and support of advocacy, policy work, and grassroots organizing – funding activities often avoided by other philanthropic entities. To date, our analysis has been informed by the work of the Design Studio for Social Intervention's *Ideas, Arrangements and Effects* Framework. The Fund now seeks a team to support the organization as we review the values and strategies that guide our work in a way that not only focuses on addressing the negative effects of the

arrangements that shape the field, but also questions the ideas that inform those arrangements<sup>1</sup>. The goal is to have clarity on ***what is ours to do***, as we evolve into an organization even better prepared to embody its values and to meet this critical societal moment.

The Fund's current \$52 million endowment generates roughly \$4.2 million in annual grantmaking funds. Reporting to the Fund's CEO and Board chair, and engaging directly with Board members and staff, the team should seek to interrogate the nested arrangements that form the context of work in the field (e.g., American Philanthropy, Capitalism) and how best to deploy the full range of the Fund's resources (grants, corpus, name and network) in service to the Fund's ambitious mission and goals in ways that acknowledge and envision new arrangements.

**During the strategy development process, the team should:**

- Work to understand the Fund – its mission and values, stakeholders, history, culture, programs, operations, partners, and potential – and the arrangements that provide context for the philanthropic work;
- Help the Fund to identify colleagues already engaged in new ideas and arrangement that speak to the funds values and aspiration;
- Develop a solid and close-working partnership with the CEO and Board Chair;
- Become a trusted source of information, advice and inspiration;
- Accompany – not lead – the Fund with steady hands, steady nerves; reflecting our stated values back to us when the process or discussions become challenging; and
- Be open to working in partnership with the CEO and Board Chair to co-create the strategy development process, engaging the full complement of the Fund's stakeholders (e.g., grantees, peers).

**IDEAL EXPERIENCE**

- Experience going through a transition/strategy development process either as the leader of a non-profit organization, within or outside of philanthropy, or as a consultant;
- Experience working in the philanthropic, nonprofit, organizing, and/or advocacy sectors is welcomed; and
- A deep background in a specific way of working/methodology is welcomed, and that might include the social sciences, public health, systems thinking, person-centered design, or similar.

**TEAM CHARACTERISTICS**

**The ideal team will be:**

- Fundamentally creative, and able to synthesize qualitative and quantitative data to describe, tell

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<sup>1</sup> See the Design Studio for Social Intervention. Ideas, Arrangements and Effects  
<https://www.ds4si.org/writings/iae>

stories and identify patterns (existing or desired), curious, inquisitive, thoughtful and probing, and passionate about supporting change;

- Able to hold space for emergent conversations;
- Trustworthy and highly ethical, working in harmony with what is being voiced by participants of the process rather than through their own predetermined filters; an ethical team that imparts trust, integrity, sensitivity, tolerance and is able to work with others in a similar vein;
- Spiritually grounded and able to express how love for all stakeholders can be incorporated into a transition process, by being open-minded, loving, encouraging, and extremely sensitive to process;
- Fully present in interactions, in a way that makes stakeholders feel elevated, energized, and expanded;
- Preferably a team of at least 2-3 people, either from the same organization or a team of independent individuals assembled in response to this request;
- Capacity for deep listening, and recognition of what it takes to facilitate strategy development and transition that goes beyond simply understanding the field of philanthropy;
- Care-centered, taking care of both the people and the process, and able to create and hold safe space for truthful, vulnerable and sensitive conversations; and
- Committed to the Fund's mission to become a more just, equitable and diverse funder.

## **RESPONDING TO THE INVITATION**

If you are a firm or group of individuals interested in being considered for this work, please submit your responses to the following questions:

1) **Why is this a compelling opportunity?** Tell us a little bit about why you want to respond to this RFQ. What sparked your interest? What makes this the kind of work that you want to spend your time on? (No more than 1 page)

2) **Why do you think your team would be a good fit for this project?** Tell us a little bit about who would be coming to the table – who will be collaborating to complete this work? Why is this the team you want to involve, and why are they a good fit for this project? How do you aspire to be a just, equitable and diverse team? We will assume that the people/organizations you propose will be available for the project if your proposal is selected. (No more than 2 pages)

3) **How would your team approach this work?** Provide us with a brief narrative (No more than 3 pages) that shares ideas of how you would approach this project. The goal is not to provide a project plan, but to help us understand how you would think about approaching this work and what you'd take into consideration. A few things we'd like to hear about are:

- a. How do you center equity in this work?

b. When you look at what is needed for this work, what do you see as a major learning curve for your team? Tell us a little bit about what you'll need to wrestle with and learn, and how you'd think about doing that.

c. When you look at what is needed for this work, what do you see as a major learning curve for the Fund? Tell me about what you think DRF will need to wrestle with and learn, and how you think we should go about that.

4) **Budget:** Please provide some general ideas about how you would use your time and resources for this project. You do not need to provide a detailed or line-item budget, but please tell us about the types of fees and expenses you anticipate being a part of the project. Please indicate the hourly rate of the types of individuals you would staff on this project, and the total hours you would anticipate spending on the project. This is designed to be an estimate only, and subject to change based on contracting to complete specific work agreed upon with the Fund. (Cost effectiveness will be considered in proposal review.)

5) **Legal Status:** Your organization's legal status (e.g., a 501c3 or a for-profit organization).

6) **References:** Please provide two references who are very knowledgeable about work you have done which would be relevant to this project (please include a description of working relationship and contact information).

7) **Deliverable Samples:** Please provide us with no more than two deliverables from other projects that you feel are great exemplars of the types of skills you'd bring to this project. These can be any format, such as reports, presentations, briefs, videos, podcasts, etc.

8) **Primary Contact:** Include the name, title, phone number and e-mail address for the primary point of contact for communication regarding this proposal.

The Fund and its partners will keep confidential any materials sent to us and will not use these in any way other than for this process. Please limit application length to no more than fourteen pages excluding budget, references, writing samples, and any resumes (if you choose to include these).

## **HOW TO APPLY**

The purpose of the RFQ is to provide an opportunity for us to learn about interested applicants, and for them to learn about us. To this end, the RFQ includes the following phases.

**Q&A Office Hours:** Wednesdays, 2:00 pm – 4:00 pm (EST) – participating in office hours is optional and does not preclude you from consideration. It's an opportunity to ask the Fund questions about the work, RFQ, or process. Use this [calendly link](#)<sup>2</sup> to schedule a 20-minute informal conversation.

**Rolling Proposal Submission:** – please send your proposal as you complete it, as they will be reviewed on a rolling basis.

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<sup>2</sup> <https://calendly.com/lrodriguez-drfund/officehours>

**Last Day to Submit Proposal:** Wednesday, September 20, 2023 – please send proposal and supporting documentation electronically in Microsoft Word or PDF format to [info@drfund.org](mailto:info@drfund.org).

**Interview of selected applicants (estimated):** Week of October 2, 2023

**Selection Announcement:** Week of November 13, 2023

If you have any questions about the David Rockefeller Fund’s work, or the invitation process, you are welcome to reach out to Lourdes J. Rodríguez, Chief Executive Officer, [lrodriguez@drfund.org](mailto:lrodriguez@drfund.org) with your questions or to schedule a call during Office Hours.

## **TERMS AND CONDITIONS**

*Application Rejection* – The David Rockefeller Fund reserves the right to reject any or all applications and to waive informalities and minor irregularities in applications received and to accept any portion of an application or all items proposed if deemed in the best interest of the Fund.

*Modification or Withdrawal of Applications* – Applications may be modified or withdrawn prior to the established deadline.

*Expenses* – The David Rockefeller Fund is not liable for the costs incurred in the preparation of a response to this RFQ.

## **WHO WE ARE - ABOUT THE DAVID ROCKEFELLER FUND**

Inspired by the vision and generosity of our founders, David and Peggy Rockefeller, the David Rockefeller Fund seeks to foster and embody a more just, creative, and flourishing world. We currently focus our work in three primary program areas:

**The Climate Program** – backs efforts to support and sustain bold, science-based leadership on equitable climate solutions. We are particularly interested in supporting non-profits run by, serving, and building power for the communities of color who have been the most disproportionately affected by the climate crisis, and in investing in under-funded constituencies and geographic areas. This includes organizing efforts to: address intersecting climate, gender, and racial justice inequities; defend voting rights; and accelerate and expand movements to keep coal, oil and gas in the ground and shift whole regions to affordable clean energy;

**The Justice Program** - supports initiatives and efforts to ensure more humane policies within detention systems and, preferably, to dramatically reduce the number of those incarcerated in favor of more just and equitable alternatives that provide healing to crime victims’ families and truly safer communities. We are especially interested in grassroots organizing, power building, and effective advocacy efforts to advance decarceration policies on a national scale; and

**The Arts Program** - supports arts and culture organizations that are using the arts to amplify social justice movements and/or progressive power-building efforts on a national level. We seek to fund exemplary and inspiring efforts that demonstrate how artistic practice can move

beyond a single person or institution, affect much broader communities than a single audience, and advance social, economic, and ecological justice.

The David Rockefeller Fund seeks to address the root causes of problems, and is guided by core principles that include, among other things: respect, flexibility, risk-taking, and self-examination. To learn more about the David Rockefeller Fund, please visit [www.drfund.org](http://www.drfund.org), or review our 30<sup>th</sup> anniversary report titled [\*Leading with Love and Gratitude\*](#).

***The David Rockefeller Fund is based in New York City, but is open to discussions regarding geographic location of the team, as appropriate.***

*Equal employment opportunity and having a diverse staff are fundamental principles at the David Rockefeller Fund, where employment and promotional opportunities are based upon individual capabilities and qualifications without regard to race, color, religion, gender, pregnancy, sexual orientation/preference, gender identity, age, national origin, marital status, citizenship, disability, veteran status, or any other protected characteristic as established under law.*