



**Connecticut Health**  
FOUNDATION  
*Changing Systems, Improving Lives.*

## **REQUEST FOR QUALIFICATIONS**

**To evaluate the Connecticut Health Foundation's current strategic plan and lay the groundwork for strategic planning for 2024-2028**

**Due: March 7, 2022**

---

**Summary:** The Connecticut Health Foundation (CT Health) requests responses to this request for qualifications from an experienced consultant or consulting team to evaluate the foundation's current strategic approach. The foundation plans to engage in an 18-month, two-phase evaluation and planning process that will culminate in a new strategic plan to advance health equity for people of color in the state of Connecticut. This request for qualifications focuses on the evaluation phase.

Responses must be received by February 25, 2022. Responses received after this deadline will not be eligible for consideration. Incomplete responses will also be ineligible for consideration.

Questions concerning the request for qualifications should be directed to Ellen Carter at [ellen@cthealth.org](mailto:ellen@cthealth.org).

<b>Closing Date and Time:</b>	<b>March 7, 2022, 5:00pm (EST)</b>
<b>Contact Person:</b>	<b>Ellen Carter</b> Vice President of Program Connecticut Health Foundation 100 Pearl Street Hartford, CT 06103 Phone: 860.724.1580, x17 E-mail: <a href="mailto:ellen@cthealth.org">ellen@cthealth.org</a>

---

## REQUEST FOR QUALIFICATIONS

### Overview of the Connecticut Health Foundation

The Connecticut Health Foundation (CT Health) is the state's largest health philanthropy dedicated to improving lives by changing systems. Since it was established in July 1999, the foundation has supported innovative grantmaking, health policy research, leadership development, and technical assistance to achieve its mission – to improve the health of the people of Connecticut.

### Background & Strategic Direction 2018-2023: Advancing Health Equity for People of Color

Racial and ethnic minorities in Connecticut are disproportionately affected by illness, disease, and lower life expectancy. People of color experience higher rates of chronic disease and are more likely to be uninsured and unable to access care compared to their white counterparts. Even when health insurance coverage and access to care are not issues, people of color often receive lower quality health care than the white population. For these reasons and many others, CT Health focuses on health equity.

In 2018, CT Health embarked on a [five-year strategic plan](#) that focused on improving health equity for people of color (the plan was extended by an additional year during the COVID-19 pandemic). CT Health framed strategies to leverage the actionable opportunities that federal health reform and state-level health system reform initiatives offered for advancing health equity. The following [goals](#) provide a high-level overview of the current plan, which is rooted in the vision that the next generation will be free from racial and ethnic health disparities.

1. **Ensure Access to Coverage:** The uninsured rate for people of color will not increase.
2. **Increase Connection to Care:** All people of color covered through Medicaid and Access Health CT will have a primary care provider or have access to a specific source of quality care.
3. **Improve Care Delivery:** New systems for financing and delivering health care will include measures that address racial and ethnic health disparities, and reward improved health outcomes.
4. **Link Clinical Care with Communities:** Strong and meaningful links will exist between the clinical care system and the communities where people live, so that health care and community organizations that work with the same people work together to improve health
5. **Strengthen Advocacy and Leadership:** Improve the breadth and depth of advocacy networks' capacity to promote health coverage, delivery system reform, and linkages to care for people of color.

## Scope of Service

Over the next 18 months, CT Health will engage in an evaluation and planning process that will culminate in a new strategic plan to be launched in 2024. We envision two phases to this work. The first is a reflection on the impact of the current strategic plan and a needs assessment of the health landscape for people of color in Connecticut.

The second phase of work will build on the lessons learned from the evaluation and research to establish a new strategic plan and goals for the foundation. **Currently, CT Health seeks a qualified consultant or consulting team to design and carry out Phase I.**

Phase I will focus on conducting an impact evaluation of the foundation's current strategic plan, in the context of the organization's [theory of change](#).

**FIGURE 1. CT HEALTH THEORY OF CHANGE**



**Advance Knowledge:** includes funding innovation and demonstration projects, supporting community-driven ideas, and investing in research

**Influence Action:** includes supporting advocacy, developing targeted communications, and support for health equity leaders

**Change Systems:** may include changing institutional policy/practice/behaviors; changing professional practice; or changing structures that produce disparities based on race/ethnicity

Using data from grant outcomes, research, prior evaluations, advocacy efforts, and grantee partner interviews, the evaluation should focus on the impact the foundation has made – directly and indirectly – through the current strategic plan. In addition, CT Health is interested in learning about the influence of our work and our approach on Connecticut's health ecosystem. Has our approach of advancing knowledge and influencing action through research and grantmaking changed the systems that influence health to be more equitable? If systems change is a long-term goal, how have the efforts under the current strategic plan strengthened or weakened the movement toward increased health equity for people of color since 2017? This evaluation and reflection process should also be grounded in current data on racial and ethnic health disparities in Connecticut and take into consideration how CT Health can have the most impact with its asset portfolio.

After the Phase I focused on evaluation is complete, CT Health will assess if the consultant(s) are interested and able to engage in a second phase of work on strategic planning. (If necessary, CT Health will issue another RFQ for Phase II work.) The scope of service for Phase II will focus on applying the findings from the evaluation process to building a strategic plan that will guide CT Health's strategy from 2024 to 2028. The foundation is interested in the facilitation and planning

skills a consultant(s) will bring to the process of building a plan, in addition to any deliverables that will document the new strategic direction.

Activities and products under the scope of service for the consultant(s) may include, but are not limited to:

*Phase I*

- Evaluation plan design, including identification of data sources, indicators, methods, and the underlying assumptions of the current strategic plan and theory of change
- Secondary analysis of data from grantees and other CT Health consultants
- Compiling a needs assessment document that can be used to benchmark the current state of health equity in Connecticut
- Financial analysis of how grant funding was allocated during the current plan
- Interviews and/or surveys with grantees, stakeholders, and leaders in the field to help document the foundation's influence toward a more equitable health ecosystem
- Facilitate board and staff conversations regarding the evaluation, current state of health equity, theory of change, and possibly, philanthropic approach
- Ongoing coordination and engagement with CT Health staff

*Phase II (Anticipated)*

- Benchmarking the current strategic approach to other similar health foundations focused on health equity
- Research how similarly sized health foundations have had used their asset portfolio to invest in systems change work
- Interview grantees, stakeholders, and leaders in the field to determine areas of opportunity for CT Health's next strategic direction
- Facilitate an interactive planning process that allows for board and staff to grow in understanding of the relationship between health equity and racial equity, and establish priorities for the new strategy
- Conduct focus groups with board, former grantees, and individuals affected by health disparities to get feedback on the potential strategic direction
- Develop a system of continuous learning that allows CT Health to proactively examine the new strategy and make changes based on emerging opportunities during implementation

**Key Evaluation Questions**

While specific evaluation questions will be developed and refined with the assistance of the consultant(s), the broad questions that the foundation seeks to answer in both phases of the work include:

- What impact did CT Health's efforts have in expanding health equity under the goals and

objectives of the 2018-2023 strategic plan?

- Did we accomplish the goals established in the strategic plan?
- Did we have the right partners/grantees? Did we have the right balance of different types of partners (e.g., grassroots/grasstops, representation of different sectors)? Who else can we engage to better advance our goals? Which partners are needed to advance the work?
- Are the foundation’s activities advancing health equity in Connecticut? If there are limitations to the foundation’s effectiveness in advancing health equity, are they the result of the strategic plan, approach, the theory of change, or the result of other factors?
- What are the core strategies in CT Health’s efforts that should be continued and/or replicated? What CT Health strategies or practices should be changed or improved?
- How can CT Health prioritize grant funding to maximize gains in health equity?
- How can the foundation improve upon ongoing learning to ensure that strategies can be adapted as needed during plan implementation?

### **Approximate Timeline of Critical Events and Steps**

<b>Date</b>	<b>Critical Event</b>
March 7, 2022	RFQ submission process closes at 5:00 pm EST
March 21-31, 2022	Remote interviews of top candidates
April 15, 2022	Final decision and notification of contract award
April – August 2022	Phase I: Evaluation and learning
September 2022	Review and present Phase I Deliverables and discussion of potential Phase II work
October 2022	Engage consultant for Phase II (RFQ or new contract)
November – June 2023	Phase II: Strategic Planning
July – September 2023	Review and present Phase II deliverables

### **Deliverables**

Research and evaluation from Phase I should be documented in a way that is useful in communicating findings to staff, board and partners. A final determination of deliverables will be discussed during the review and selection process. Engagement in Phase II of work and decisions on deliverables will be finalized in October 2022.

### **Evaluator Qualifications and Expectations**

CT Health seeks a consultant(s) that will works collaboratively with our staff and leadership. The foundation seeks to engage a consultant the following qualifications:

- Demonstrated commitment and skillset for culturally appropriate evaluation

- Demonstrated organizational commitment to equity
- Proven record in evaluation and developing philanthropic strategy
- Demonstrated ability to evaluate systems change
- Preference for the team to understand the Connecticut landscape and data sources (not a requirement)
- Demonstrated quantitative and qualitative data collection and analysis skills
- Ability to represent complex ideas and concepts clearly and simply
- Ability to engage a diverse group of stakeholders electronically, in person, or by phone
- Flexibility and creative problem solving
- Open, candid, and frequent communication with foundation staff
- Commitment to evaluation team diversity and cultural competency

### **Reporting Structure**

The evaluation team will report directly to Ellen Carter, vice president of program, and Eminent Abebe Gurganus, director of grantmaking.

### **RFQ Submission Preparation and Formatting Guideline**

To be considered for this evaluation contract, respondents must answer the questions outlined in *RFQ Requirements*. Responses should not exceed 10 pages. Also required is the submission of a curriculum vitae (for each team member), a work sample, and three references (names and contact information).

In addition, please submit the following statement signed by each team member:

*“I understand that all intellectual property that is part of this evaluation is solely owned by the Connecticut Health Foundation. I understand that I, as a contractor, have no rights to the use of the information collected in this evaluation for purposes other than this evaluation.”*

### **RFQ Requirements**

CT Health will select a consultant or consultant team based on demonstrated experience, skills, and capacity to conduct an organizational level evaluation and planning process, as well as ability to be customer-service oriented in working with both the foundation and its grantees/partners.

Applicants should submit responses and appropriate supporting documentation for each of the criteria/questions listed below. Please limit your responses to no more than 10 pages (excluding attachments). The foundation values the ability to convey information in a clear and succinct way. Deliverables should be accessible to a broad audience and free from jargon.

1. State the applicant organization’s name and contact information.
2. Identify the organization’s status with the Internal Revenue Services.
3. If applicable, identify the applicant’s affiliations with institutions of higher education.

4. What type of work does the consultant/team members generally perform?
5. What is your organizational structure? Describe your ability to provide necessary supervision, direction, administrative support, and technical capacity to complete the project.
6. Identify the lead consultant and team members (if applicable) and provide a summary of their relevant experience and skills. Attach a CV for each team member.
7. Provide an overview of the approach the consultant/team might employ to complete the work in Phase I. Please indicate if there is interest in supporting Phase II work.
8. Provide examples of experience consulting on projects of similar scale and scope.
9. Demonstrate the consulting team's understanding of racial justice and power dynamics in philanthropy. Provide examples of previous work in these areas.
10. Describe the team's philosophy, skills, and strategies for engaging diverse cultures and communities in evaluation and planning, citing specific past examples.
11. What other system-focused work have the consultant/team completed in the past? Include examples of work that involved systems change approaches and examples related to equity.
12. Submit a draft budget and budget narrative for Phase I. The budget for Phase I work should not exceed \$75,000.

### **Submission, Review, and Selection Process**

Letters of qualifications from applicants are due **February 25, 2022**. Please e-mail qualifications to Grants Manager and Program Administrator Tamisha Phillip ([tamisha@cthealth.org](mailto:tamisha@cthealth.org)).

All evaluation teams that submit responses to this request for qualifications will receive notification of the result of the selection process by **April 15, 2022**.