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## REQUEST FOR PROPOSAL REGARDING RACIAL EQUITY AUDIT AND IMPROVEMENT PLAN

### **Statement of Purpose**

The Shalem Institute for Spiritual Formation seeks a consultant or consultants to engage with organization leaders to (i) identify and/or design learning opportunities for organizational stakeholders to build awareness of white supremacy, implicit bias, and inequitable outcomes at Shalem and in society at-large, (ii) review internal systems for bias and inequitable outcomes, (iii) review program curricula and teaching methodology for bias and inequitable outcomes, (iv) propose changes that are more likely to yield equitable results related to items ii and iii, and (v) develop processes for handling conflicts related to racial equity to support organizational health and wholeness as they emerge.

We recognize that the expertise and time required to fulfill all of these stated goals may not be possible or realistic for a single consultant. We welcome proposals that respond to a portion of these aims.

This work arises out of [Vision 2025](#), the strategic direction of the organization approved by the Shalem Board of Directors in November 2022.

### **Background and Introduction**

The Shalem Institute for Spiritual Formation provides in-depth support for contemplative living and leadership – a way of being in the world that is prayerfully attentive and responsive to God’s presence and guidance. We offer a wide variety of programs and resources for clergy, spiritual directors, lay leaders, and individuals who desire to open themselves more fully to God in their daily lives and work.

Shalem was founded just over 50 years ago by Tilden Edwards, an Episcopal priest, who felt called to share contemplative practices that supported one’s desire to live moment-to-moment with God. Joined in the early years by Gerald May and Rose Mary Dougherty, these pioneers of the contemplative movement helped to bring contemplative prayer and practice out of the purview of the monastery and to make it available to all seekers.

Shalem serves those who seek spiritual deepening in all of life. We welcome individuals wherever they are on the path of spiritual discovery. Shalem’s programs center on contemplative teaching and practices that open the mind and awaken the heart to the living of the Spirit. Shalem is grounded in the Christian contemplative tradition, yet draws on the wisdom of many religious traditions. We provide opportunity for spiritual exploration individually and within a community of seekers. Shalem is one of the most respected centers for spiritual deepening in the US and globally. For 50 years, we have

been privileged to have many of the world's foremost spiritual speakers and writers on staff and in our programs.

Participants come from many different denominations and faith traditions – all seeking connection, nurture, and support. Over the years, thousands of men and women, nationally and internationally, have immersed themselves in the long-term programs and have been refreshed through the many shorter programs. Often participants find their lives and ministries renewed or transformed.

Shalem is based in the diverse and rapidly gentrifying Logan Circle neighborhood in northwest Washington, DC, near downtown. The organization is governed by an 18-member board of directors and is guided by a 10-person staff, which includes employees and contractors, full time and part time employees. In addition, Shalem programs are led by 12 program directors and about 30 adjunct staff members whose level of involvement with Shalem varies each year. The organization's current operating budget is \$1M. For more information, please visit [www.shalem.org](http://www.shalem.org).

Shalem has made diversity, equity, and inclusion a priority for the past several years. This has been comprised of, but not limited to, the following:

- Explicitly naming and pursuing people of color candidates for board service and leadership in program director roles. Currently, two of the 12 program directors are non-white and five of 14 current board members are non-white; there are four vacancies on the board as of this writing.
- Additionally, the Executive Director has partnered with a current board member (and past program director) to lead Contemplative Conversations on Race, an introductory workshop to explore one's racial identity.
- Further, in 2020 many board members and staff people volunteered to participate in Radical Acting in Faith for White People, a free offering provided by the American Friends Service Committee.
- The Program Committee of the Board spent two years (2020-2022) meeting with program directors and other staff to understand efforts being made to change program curricula to be more inclusive and how leaders recruit more applicants of color.
- In 2022, a group of Shalem graduates of color formed the Contemplatives of Color/BIPoC Advisory Committee. This group meets regularly to discuss racial equity issues at Shalem, maintain a list of resources by contemplatives of color, and has conducted a survey to discern the experiences of people of color in Shalem offerings.
- In 2023, the respective retreats of the Executive Committee of the Board and the full board focused on learning about white supremacy culture and how Shalem can become an anti-racist organization. This was followed up by an additional staff and board development sessions.

#### **Project goals, scope of services, and timeline**

The Shalem Institute for Spiritual Formation is seeking a part-time consultant or consultants to help us establish regular learning opportunities for staff and volunteer leaders to grow in their awareness of racism, white supremacy, and how that impacts Shalem and the world. In addition, we seek a consultant or consultants who can assess our practices, procedures, systems, curricula, and teaching

methodology for implicit bias to propose reforms to those systems that would make them more equitable. Finally, we also seek to establish a protocol for addressing conflicts that may emerge within the organization related to racial equity. Through these efforts and activities we hope to integrate racial equity in to the daily operations and functioning – the very identity – of the organization.

While this work arises out of a desire to identify and remove racist biases, the organization recognizes that such biases are impacted by and related to additional issues, including economics, gender, and sexual orientation. Shalem anticipates the work of seeking equity to be intersectional and that the work must be viewed through this broader context. We will prefer proposals that seek to implement an intersectional approach that addresses race alongside ethnicity, culture, disability, sexuality, and gender identity and expression.

We envision the work taking place in three concurrent streams. These streams are:

**Stream One:** Systematize learning opportunities for organizational stakeholders to build awareness of white supremacy, implicit bias, and inequitable outcomes at Shalem and in society at-large.

**Stream Two:** Conduct an internal examination of our structures, processes, practices, curricula, and teaching methodology to assess where bias exists, identify strategies for removing bias and racism, and implement those strategies in an effort to create equitable systems.

**Stream Three:** Propose a conflict management process to maintain trust and institutional integrity in the event of a racially bias-related incident or conflict.

Within each stream, we envision the work unfolding in three phases. The phases are:

1. **Assessment:** this phase will include a combination of tools and tasks to enable the consultant to get to know our organization and our context. This could include, but is not limited to, interviews of leaders and participants, examination of governing documents and processes, surveying program residencies and staff meetings, and reviewing prior work and prior/current outcomes.
2. **Identify Strategies:** this phase will synthesize information learned during the assessment phase and identify, with specificity, the changes that could be made to meet the objective of the particular stream. Strategies will be relevant to our context and contemplative mission.
3. **Implementation:** this phase will include production of a written report with the consultant's observations from the assessment phase, recommendations from the second phase, and a strategic plan for implementing and holding ourselves accountable for communicating the results of the project and making needed changes. This report should enable us to continue the work of racial equity related to the particular stream after the consultation engagement has ended.

We anticipate each phase would take approximately three to six months and would include strategically scheduled conversations with leaders throughout each phase to discuss the consultant's progress and findings.

### **Submission of proposals**

Questions and proposals should be submitted to Jackson Droney, Director of Operations, at [jackson@shalem.org](mailto:jackson@shalem.org).

### **Proposal deadline / anticipated selection schedule**

- This RFP will be made publicly available on the organization's website on **April 29, 2024**.
- Questions about this RFP should be received by **May 20, 2024**.
- If needed, Shalem leaders will host a Zoom call in **June 2024** to respond to questions. Information will be posted on the website and the call will be recorded.
- Proposals should be received no later than **June 22, 2024**.
- Organization leaders will review proposals and select top bidders and notify unsuccessful bidders no later than **June 30, 2024**.
- Negotiations with top bidders will begin no later than **July 1, 2024**.
- Contract will be awarded and unsuccessful bidders will be notified no later than **July 10, 2024**.
- Consultant will begin work in the first quarter of FY25 (July – September 2024). We are, however, open to negotiations regarding scheduling for the right candidate.

### **Elements of proposal**

Proposals should include:

- Information about the consultant's qualifications, strengths, and experience relevant to the proposal;
  - If applicable, include examples of relevant work done in a non-profit and/or faith-based organization or ways in which the consultant would approach the work in this setting;
- Information about the consultant's firm, if applicable, including general overview, relevant experience, and size of firm;
- Three to five references, including organization(s) for whom the consultant has done similar work;
- Description of the full scope of tools and tasks the consultant would seek to utilize, including interviews, surveys, review of internal documents, etc. and the projected number of hours needed for each tool or task;
- Description of which streams of work detailed above the consultant will focus on;
- Description of what metrics and measurements of success will be used;

- Consultant's rate of compensation for each activity/phase of the project, fee schedule, and total fees;
- The consultant's availability to begin work and proposed timeframes to complete each phase of the project;
- Any factors or additional information that would affect the consultant's proposal whether in terms of substance, timing, or budget; and
- The consultant's contact information.

### **Evaluation criteria**

Proposals will be evaluated based on the consultant's expertise, relevant experience, references, comprehensiveness of proposed plan, timeline, and whether the proposed fees are within the organization's budget.

### **Possible roadblocks**

There are a few possible roadblocks in front of Shalem as it pursues this work, and the consultant(s) are likely to encounter instances of all of them at different times during their potential engagement.

1. Shalem strongly emphasizes the unique spiritual path of each individual. This strong emphasis of individualism is intended to be a welcoming expansive embrace of the variety of spiritual experiences people have. However, taken too far it can become an excuse for individuals to deny or ignore the harmful impact of their actions on others or notice how we are inextricably bound to one another.
2. Shalem leaders and staff do not have strongly developed comfort with processing and resolving difficult situations and feedback openly and directly. This comes from a desire to protect feelings, but it also means that there is not shared understanding among leaders about difficult situations and patterns in organizational life. There can be low tolerance for critical feedback, impulsive defensiveness, and not much imagination for how people might have adverse or negative experiences through Shalem's offerings.
3. Shalem leaders are at varying stages of their racial consciousness development. The way language is used and understood regarding racial equity and justice is uneven among leaders, and different leaders have varied impressions of the importance of the various aspects of the requested scope of work.
4. Shalem operates with a small staff of few full-time employees and many part-time employees and contractors. This staffing configuration means staff are often operating beyond their capacity, and this could affect scheduling and the time available for staff to interact and respond to the consultants' needs/requests.

### **Budget**

Shalem has received a grant to fund the project at \$40,000 for FY25 and is committed to funding in successive fiscal years as needed to complete the project.