



Call for Consultant

Vitalyst Health Foundation is seeking a contractor to conduct a thorough needs assessment and facilitate selecting its next grants management system (GMS).

About Vitalyst Health Foundation

Vitalyst Health Foundation is on a mission to inform, connect, and support efforts to improve the health of individuals and communities in Arizona. Over its history, the foundation has invested more than \$134 million and established itself as a key thought leader, convener, and catalyst of key initiatives – ranging from statewide health policy and systems change to housing collaboratives.

Background

In 2018, Vitalyst embarked on a strategic planning process, which resulted in developing short- and long-term goals to guide our programmatic work.

The COVID-19 pandemic made us rethink our strategic direction and allowed us to learn from the way the health equity grants were distributed and evaluated. We sought out feedback from our partners through convenings and surveys to ensure our strategic update was something our partners would help us achieve.

Our goals have been updated to incorporate three outcomes:

1. Creating collaborative networks working to improve the conditions that impact health;
2. Strengthening our partners so they are equipped to advance health equity; and
3. Informing decision-makers to ensure community health and well-being are prioritized.

We hold an “open door policy” to discover partnerships across the state. Last fiscal year, more than 200 entities explored partnerships with Vitalyst and TAPAZ, our fiscal sponsorship program.

We partner with approximately 70 partners annually through our responsive grants program, we have 60 fiscally sponsored projects through TAPAZ, and support nearly 20 other partners through non-competitive programmatic funding opportunities.

With a goal to embody trust-based philanthropic practices, transitioning to a new GMS will help boost internal operating systems for the present into the future as our strategies, equity approach, and grantmaking deepen in communities.



Current Systems Environment

To date, Vitalyst has utilized a mix of systems to support our grants management processes. We currently use Zengine by WizeHive to do a multitude of things:

- track prospective partnerships,
- accept, review and analyze grant proposals,
- manage contracts,
- collect grantee data and manage reporting,
- track programs and internal budgets, and
- track some partner communications (to an extent, a sort of CRM – Customer Relationship Management) system.

In addition to WizeHive, we use Microsoft products and Constant Contact to accomplish other tasks. Microsoft Teams is used to manage the work of the Grants and Partnerships Team. Microsoft Excel is used heavily to manipulate data for analysis and reporting purposes. Constant Contact is used to store our master contact list and distribute communication to both partners and external individuals.

To better meet the needs of prospective partners, grant partners, and the Vitalyst team, we are eager to find a technology solution to support and streamline our entire grants and partnerships process.

Goals, Design, and Scope of Work

Vitalyst will work collaboratively with the contractor to develop a detailed scope of work. However, at a minimum, deliverables for this scope of work must include:

1. Needs Assessment
 - a. Review Vitalyst’s current grantmaking process and tools used throughout that process.
 - b. Conduct interviews with the Vitalyst team members (Grants and Partnerships Team, and Finance and Accounting Team) to understand the linkages between GMS data and other departments.
 - c. Assess the user experience of grant partners who use other systems.
 - d. Document user needs, specifications, wants, and “must-haves.”
2. GMS Scoping
 - a. Research and come up with a short list of GMS options that address the needs defined above.
 - b. Provide recommendations for technology identified that can best meet all solutions and requirements to streamline and improve funding management with a particular lens towards trust-based philanthropy.
 - c. Facilitate the selection process to choose the new GMS.

It is anticipated that this first phase of work will be followed by a separate call for consultants for the



implementation phase of the new GMS.

Reporting Structure

The contractor will report to David Martinez III, Director of Strategic Community Partnerships, who will align the contractor's work and various members of the Vitalyst Grants and Partnerships Team, as well as the Finance/Accounting Team.

We're particularly excited to work with a contractor who has:

- Familiarity with the philanthropic landscape and best practices for grantmaking.
- Experience working with funders in choosing a GMS, whether local or hosted.
- Previous experience managing projects that guide needs between users and technology.
- Knowledge of grants management processes, from pre- to post-award.

Next Steps & Timeline

If you are interested in being considered for this opportunity by Vitalyst, please make sure you've signed up for Vitalyst's Team of consultants/coaches, which includes a completed profile in our grants/contracts management system, WizeHive (<https://vitalysthealth.org/tap-team/>), and email David Martinez III at DMartinez@VitalystHealth.org. The deadline to be considered for this opportunity is 5:00 PM MST-AZ on Monday, September 18th.

The contractor's selection will be by Friday, September 29th, and the contract is expected to go from October 2023 to February 2024.