

INVESTMENT CONSULTANT SEARCH SERVICES

Is an investment consultant RFP on your horizon? Let Community Capital Advisors guide the process and help you make objective decisions.

As a matter of best practice and fiduciary duty, foundation leaders periodically assess the cost and suitability of their investment advisor relative to the foundation's current needs and future direction. This is typically done through a *request for proposal* or "RFP" process that can take 3-6 months to administer, once you know who to include, what to ask and how to evaluate the responses.

Conducting an RFP can be a daunting task under normal circumstances and even more daunting when one considers the added complexities of evaluating traditional non-discretionary versus full-discretion "OCIO" models and identifying best-in-class approaches to integrating ESG, engaging diverse managers and including impact investments.

At the Intersection of Impact and Investing

Community Capital Advisors (CCA) serves clients at the intersection of impact and investing. Our value-add is knowing both the investment consultant and impact investing landscape. We bring more than two decades of experience and insight as to which investment advisors would be most aligned with each foundation's specific investment goals and priorities.

We provide education, project management, professional reporting and regular updates throughout the process, enabling foundation leaders to make informed and objective decisions.

CCA Investment Consultant Search Services Include:

- Develop investment RFP objectives and priorities from committee and staff input
- Provide committee education on discretionary versus non-discretionary and hybrid options
- Identify the right RFP prospects and narrow the recipient list to best-fit candidates
- Formulate RFP questions across seven categories of evaluation
- Evaluate, score and summarize RFP responses for committee selection of finalists
- Conduct reference checks and facilitate operational due diligence reviews with staff
- Facilitate finalist selection meetings and presentations
- Facilitate committee selection of finalist
- Provide useful feedback to all candidates

Testimonials

“You have been one of the most, if not the most, professional, candid, and fair service providers I’ve had the pleasure to work with.”

— Kathryn Mawer, Vice President and OCIO Advisor, FEG Investment Advisors

“I thought the review process was terrific. Bert did a great job. For myself it elucidated how the foundation is running the investment process.”

— Finance Committee Member

“The RFP process was a terrific professional learning for all of us and really helped me to see and understand the scope of work ahead. I think we would continue to benefit from you working with us. You will leave us stronger than you found us. So grateful for your work with us on this!

— Community Foundation CEO

“It was an excellent process. I so appreciate all you brought to it!”

— Community Foundation CFO

Practice Lead

Bert Feuss, Senior Advisor Community Capital Advisors

Bert brings over three decades of investment and foundation leadership experience including at Silicon Valley Community Foundation where he conducted multiple RFPs for investment consultant and financial service providers as the Senior Vice President of Investments, and as a Finance & Investment Committee member for the UC Davis Foundation where he participated in the design and evaluation of multiple RFPs for outsourced CIOs. Bert’s commitment to strong governance and accountability practices continues to influence the field today.

Let’s Talk

For more information or to request a proposal, contact Bert Feuss at 415-577-033 or by email at bert@communitycapitaladvisors.us.

Community Capital Advisors (CCA) provides foundations and mission-driven organizations nationwide with leading insight, services and partnership to accelerate their mission. We help foundations align their investment capital and practices with their missions to advance racial equity, inclusive economies, sustainable growth and healthy communities. To learn more about CCA services, please visit: www.communitycapitaladvisors.us