REQUEST FOR QUALIFICATIONS (RFQ)

EVALUATION OF THE
BUILDING AND BRIDGING POWER TO ADVANCE HEALTH EQUITY
THROUGH POLICY AND ADVOCACY STRATEGY
Release Date: Dec. 10, 2019

DEADLINE AND SUBMISSION INSTRUCTIONS:
To respond to this RFQ, please submit a proposal (of no more than 12 pages) addressing the components listed in Section X of this RFQ, as well as a file containing requested appendices and other supporting materials, by 11:59 p.m. MST on Jan. 10, 2020.

Submissions should be sent electronically to Evaluation & Learning Manager Felisa Gonzales, PhD, MPH, in Adobe Acrobat (.pdf) or Microsoft Word (.doc) format.

For questions prior to submission, please contact Felisa Gonzales via email or (303) 539-3110.
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I. Introduction

Purpose
The purpose of this request for qualifications (RFQ) is to invite interest in working with The Colorado Trust to design and implement an evaluation and learning approach for a four-and-a-half year, $14.5 million strategy focused on building and bridging power to advance health equity through policy and advocacy (Building and Bridging Power strategy). Through this evaluation The Trust seeks to learn what is required to (1) build power by organizing people and resources for direct involvement in issues and in decision-making, and (2) build a durable, long-term policy infrastructure that bridges the expertise of community organizing and policy advocacy organizations with the lived experience of community members, so that community voices can lead the development and implementation of policy at all levels.

This work will take place in two distinct phases. Phase I will occur from March through December 2020 and will result in the generation and refinement of a robust evaluation and learning plan. Phase II will span January 2021 through September 2024 and will include data collection, analysis, and dissemination activities. We seek an evaluator who has expertise in evaluation of capacity-building, community organizing, and policy and advocacy efforts; a strong learning orientation; and a commitment to equitable evaluation practices.

The Colorado Trust
The Colorado Trust (The Trust) is a private, statewide health foundation that was created in 1985 with the proceeds from the sale of the PSL Healthcare Corporation. The Trust believes that all Coloradans should have fair and equal opportunities to lead healthy, productive lives regardless of race, ethnicity, income or where we live. We partner with people and organizations across Colorado that are working to make positive changes in their communities. We provide funding and other resources so that all people have the ability to make decisions that improve their lives and the lives of their neighbors. We work side by side with grantees and community members to ensure grants are solution-based and effective.

The Trust is committed to funding policy and advocacy work because we believe that local, regional and statewide policies should have a positive impact on people’s well-being. We provide grants and support to organizations that advocate for policies that ensure all Coloradans live healthier lives. The Trust works with grantees to reduce silos, maximize resources and incorporate diverse voices with the intention to shift power dynamics and create policy change that achieves better health for all Coloradans.

Research, Evaluation and Strategic Learning at The Trust
Evaluation, research and an ongoing commitment to learning are important tools that help The Trust better understand what works, adjust and improve, and strengthen our current and future efforts. The Research, Evaluation & Strategic Learning (RESL) department collaborates with internal and external partners to design and manage evaluations of The Trust’s funding strategies and to disseminate evaluation findings to a wide array of stakeholders.
Through its contracting, collaboration and evaluation design and implementation practices, the RESL department is committed to upholding the following principles of Equitable Evaluation:

1. **The production, consumption and management of evaluation and evaluative work should hold at its core a responsibility to advance progress towards equity.**

   Through our evaluation designs and dissemination, we strive to highlight inequities and promising approaches for addressing them. We prioritize the perspectives of historically marginalized populations. We firmly believe in the use of evaluation for learning among grantees, foundation staff and the philanthropic field. To this end, we hold that evaluation information should be readily understood by, and useful to, community members as well as foundation staff, policymakers and other interested parties.

2. **Evaluative work should consider the historical context and present-day systems and structures that contribute to inequities, and answer critical questions about the effect of a strategy on these underlying systemic drivers of inequity as well as different populations.**

   Inequities that exist today are the result of both current and previous policies, practices and mindsets. Through our advocacy strategy, we provide grants and support to organizations that advocate for policies that ensure all Coloradans live healthier lives. Evaluations of our advocacy investments must necessarily investigate how these resources have contributed to more equitable processes for policy development and implementation. They should also situate findings within the larger social and political context.

3. **Evaluative work should be multiculturally valid and oriented towards participant ownership.**

   Better, and more complete, data can be obtained when methods are tailored to the practice and philosophy of grantees. We believe that obtaining grantee input throughout the evaluation process will increase ownership of the data and findings and may contribute to increased capacity to evaluate their efforts in the future. We recognize the value of lived experience. As evidence, we welcome any rigorous method inclusive of storytelling, other qualitative methodologies, and indigenous ways of knowing.

These principles are further reflected in sections IV (Evaluation and Learning Description), V (Desired Qualifications and Selection Criteria) and VI (Scope of Work and Expectations).

II. **Strategy Overview**

The **Building and Bridging Power** strategy will support the development and capacity of grassroots organizations and groups that can build power among community members across Colorado. It also aims to intentionally bridge power between communities, community organizing organizations and policy advocacy organizations so that community voices can lead the development and implementation of policy at all levels.

The Building and Bridging Power strategy is intended to complement community-led solutions for health equity funded through the **Community Partnerships** strategy, a multi-year strategy in which The Trust partners with community resident teams across the state to build resident power—particularly the power of residents who have historically been excluded and who are directly impacted by health inequities. This form of resident-driven grantmaking fosters long-
last relationships, honors the experience and power of people, and aims to create sustainable change in communities.

One of the key tactics to addressing and undoing inequities and building power in communities is advocacy and policy change. Having local organizing infrastructure that is rooted in equity is vital for the long-term support needed for residents working with The Trust, as well as other residents across the state, to move forward their most pressing issues. Without organizational partners conducting systems-level change, efforts of community members to eliminate inequities will be limited. The Building and Bridging Power strategy aims to create an advocacy environment that will facilitate the ability of community members to advance policy solutions addressing their most pressing issues at the local, regional and/or state levels.

The strategy will build and bridge power in the following ways:

1. **Organizing people and resources** for direct involvement in issues and in decision-making arenas.

   Up to 14 grassroots organizations—groups and organizations led by people closest to the issues that develop programs and policies by and with their communities, such as community organizing or direct service groups—will receive general operating funds to build or strengthen their organizing skillset. The organizations will also have access to capacity building and technical assistance resources. We anticipate they will use these resources in a variety of ways and for numerous purposes, including to increase (1) advocacy and policy change capacity of their base, members and leaders; (2) their organizational diversity, equity and inclusion capacity; and (3) their ability to evaluate and learn from their organizing efforts, as well as other areas they identify for themselves.

2. **Building durable, long-term policy infrastructure**, including networks of organizations that are aligned around shared goals that can shape advocacy agendas.

   Up to seven grassroots organizations—groups and organizations that work directly with policy and decision makers to change local, regional or state policies—will receive general operating grants to leverage their unique skills in research, policymaker education and policy process expertise to engage community groups in the development and implementation of policies. These organizations will also have access to capacity building and technical assistance resources, which may be used to increase (1) their relationship and trust-building skills to reach communities and residents; (2) their ability to describe issues and policy opportunities in an accessible and inclusive way; and (3) their organizational diversity, equity and inclusion capacity, or to address other capacity-building needs that the grantees themselves identify.

3. **Making meaning of and shifting popular narratives** about why inequities exist and how people understand and think about health, race, income, the economy and government.

   Stories and narrative are powerful allies of advocacy work and policy change. Journalism has the potential to disrupt dominant narratives by putting focus on powerholders and policies that affect the health and well-being of Coloradans. Responsible, deeply reported journalism that accurately reflects community concerns can accelerate policy advocacy efforts. A research study of the media landscape in Colorado will be conducted in late 2019 and early 2020. Findings from this scan will be used to develop a strategy that funds journalism and narrative work.
While the Building and Bridging Power strategy will support all three of the efforts described above, the evaluator selected through this RFQ process will evaluate the first two only. A separate RFQ will be issued for the evaluation of the narrative component after the completion of the media landscape study and subsequent approval of a strategy to fund journalism and narrative work.

More information about the Building and Bridging Power strategy, including an information document for interested applicants, can be found on our website.

III. Desired Outcomes

The Building and Bridging Power strategy aims to create an advocacy environment that will facilitate community members' ability to advance policy solutions addressing their most pressing issues. Through the implementation of this strategy, The Trust also hopes to learn how grantmaking practices can be adjusted to best support the building and bridging of power for community-led change. Desired outcomes include:

1. Organizing people and resources
   - A community-organizing infrastructure exists and supports community members having influence and control over decisions that affect them
   - Changes in policies, procedures and practices occur in and across grasstops and grassroots organizations that demonstrate a commitment to equity and meaningfully engage those most impacted by health inequities
   - Policy and advocacy efforts at the local, regional and state levels reflect community voices
   - Grantmaker capacity to support community organizing and power building is improved.

2. Policy infrastructure
   - Grasstops organizations help develop and support local, regional and/or state policies that are informed by and responsive to communities
   - Mutually beneficial relationships and capacities of grasstops and grassroots organizations are developed, strengthened and sustained
   - Changes in policies, procedures and practices occur in and across grasstops and grassroots organizations to demonstrate a commitment to equity and meaningfully engage those most impacted by health inequities.

While grassroots and grasstops organizations will be the grantees, the work done by grantees will influence individual community members, grantee organizations and The Trust, and will contribute to policy changes at the local, regional and state levels. The evaluation will have to be creative and nimble in assessing the multi-level outcomes of this strategy, and will require collection of data from grantees as well as their constituents and elected officials or other powerholders.
IV. Evaluation and Learning Description

Through the evaluation of the Building and Bridging Power strategy, The Trust hopes to learn what is required to (1) build power by organizing people and resources for direct involvement in issues and in decision-making and (2) build a durable, long-term policy infrastructure that bridges the expertise of community organizing and policy advocacy organizations with the lived experience of community members, so that community voice can lead the development and implementation of policy at all levels.

Building upon evidence that policies developed and informed by the public are more effective, valued and have a wider distribution of benefits, the proposed strategy aims to support grassroots efforts across the state that engage residents in advocacy efforts. Community organizing is a way to bring people together, especially those who have traditionally been excluded from decision-making processes, and harness their power to make the changes they would like to see in their communities. The evaluation will assess how, and how effectively, grassroots organizations engage community members in advocacy, develop them into leaders, and move them to action. It will also recognize the expertise of grassroots organizations in knowing what is important to capture about their work, and include indicators prioritized by grantees.

Organizing and policy advocacy approaches share some similarities. Both require long time frames to achieve the stated objectives; are complex and iterative; are dependent on collaboration; see incremental and uneven success; are subject to unpredictable and uncontrollable external factors; and capitalize on opportunities and emotions. These two approaches differ, however, at a core level. Community organizing is emphatically bottom-up... Most advocacy is fundamentally top-down, even if the work is authentically undertaken on behalf of community members. The evaluation will determine whether and how targeted capacity building and intentional fostering of relationships can bring these two approaches together in service of elevating community voices and priorities in policy advocacy. Suggestions from grassroots organizations about areas where grassstops organizations can grow to center the voices and priorities of community members, and suggestions from grasstops organizations about ways in which grassroots organizations can support their members in engaging in formal policy advocacy activities, will inform the development of the evaluation.

Evaluation to Inform Learning

The evaluation data will feed into and support a larger learning plan that is based on the strategic learning needs of The Trust and the organizations funded through the Building and Bridging Power strategy. While The Trust has already posed initial learning questions (see below) that the evaluation should help inform, the evaluator will lead the development and stewardship of a more concrete learning plan that identifies (a) the core strategic learning questions most relevant to The Trust’s ability to support the building and bridging of power, and (b) key points at which evaluation data should be shared with The Trust and grantees to help them generate their own learnings and adapt as necessary.

We recognize that many funders, researchers and organizations may be interested in the answers to these learning questions, and that full answers are beyond the scope of this evaluation. However, the evaluation questions we pose below are intended to generate information that can inform and further understanding of how to build and bridge power. While the evaluation team is not charged with answering the learning questions, they will...
collect data to answer the evaluation questions linked to each learning question and facilitate sessions with grantees and Trust staff to interpret the data collected, surface insights and aid in the determination of how to apply the resultant learnings to inform strategic or organizational decisions.

**Learning question #1: What is needed to organize community members from historically marginalized groups to have influence over decisions that affect them?**

*Our hypothesis:* Providing general operating and capacity-building support to grassroots organizations will contribute to an activated base of residents across the state who use their power to take action and promote policies that advance health equity.

*Guiding evaluation questions to test our hypothesis:*

- To what extent does providing general operating and capacity-building support serve to increase the capacity of grassroots organizations? Do these investments support grantees in engaging more community members in advocacy, or increase the depth of that engagement?
- How has the advocacy strategy contributed to engaging and mobilizing residents, particularly those marginalized, by grassroots organizations in all seven of the Community Partnerships regions?
- What is required of grassroots organizations to establish and maintain a base of activated residents who understand and can leverage their power in different geographic contexts? How do grassroots organizations in Colorado apply known best practices for community organizing, and what approaches are yielding unexpected results?
- In what ways are (or aren’t) changes in the engagement and mobilization of residents contributing to an increase in the power of communities to shape policy and advocacy efforts in meaningful ways? Are there any unanticipated effects of the strategy that are likely to boost or impede the power of residents and communities to influence policy?
- What strategies successfully support alignment of The Trust’s advocacy and resident-driven grantmaking? What opportunities were facilitated, and which naturally occurred? What aspects of the strategy are most/least important for increasing engagement and mobilization of residents?

**Learning question #2: What will it take to build an infrastructure for sustained, long-term engagement of community members in policy and advocacy?**

*Our hypothesis:* Providing general operating and capacity-building support to grasstops organizations will result in increased capacity for and intentional fostering of relationships in service of elevating community voices and priorities in policy advocacy.

*Guiding evaluation questions to test our hypothesis:*

- To what extent were connections between communities, grassroots and grasstops organizations facilitated and strengthened as a result of the advocacy investment, and how do these connections facilitate community voices leading the development and implementation of policy?
In what ways are grasstops organizations more responsive to community voices? Has there been a shift in power over decisions, such that community members play a more key role in the decisions made by grasstops organizations?

How do grassroots and grasstops organizations grow in how they understand their own (and leverage each other’s) power for policy change? What changes and relationships demonstrate this increased understanding and use of power?

What types of capacity and infrastructure are needed by grasstops organizations to meaningfully incorporate community voices? What are the major barriers that need to be removed in order for grasstops organizations to better incorporate community voices?

As evidenced by the evaluation questions, the evaluation will address issues of implementation, outcomes, and to some degree, impact.

V. Desired Qualifications and Selection Criteria

Who can apply
Evaluation firms and teams of evaluators are encouraged to apply. We welcome responses to this RFQ from evaluators both inside and outside of Colorado, although a deep understanding of and familiarity with Colorado is required. Out-of-state applicants should also plan for at least four trips to Colorado annually to meet the evaluation and learning needs of The Trust and the Building and Bridging Power grantees.

Qualifications
We are seeking evaluation firms and/or teams of evaluators that are familiar with existing literature on and have demonstrated expertise in the evaluation of:

- **Capacity-building efforts**: The grassroots and grasstops organizations and groups funded through the Building and Bridging Power strategy will have identified areas where they need to grow in order to engage and mobilize community members in advocacy, and to do so more effectively. Specifically, the evaluator should have experience identifying and assessing organizational capacities that are essential for effective advocacy and organizing efforts, such as leadership and adaptive capacity. Additionally, experience evaluating racial-equity capacity building is strongly preferred.

- **Advocacy efforts**: A desired outcome for this strategy is that policy and advocacy efforts at the local, regional and state levels reflect community voices. The evaluator should have experience with methodologies appropriate for assessing strategic relationship building and authentic partnership between policy advocacy organizations, community organizing organizations and community members. Additionally, the selected evaluator will be familiar with advocacy evaluation approaches that enable examination of community involvement and influence on policy development and implementation.

- **Community organizing and power-building efforts**: Another desired outcome is that as a result of this strategy, a community-organizing infrastructure exists and supports community members having influence and control over decisions that affect them. This will require examining how a community organization or group prepares for (development of critical consciousness and/or root-cause analysis; analysis of culture and place; assessment organizational capacity) and carries out (diverse and inclusive
participation of community members; development of leaders; establishment of an ally base; ability to mobilize community members; use of strategic communications, etc.) advocacy actions.

- **Strategies to advance equity:** Evaluating strategies to advance equity can be complicated. It requires comfort with ambiguity, flexibility if/when grantee needs and plans change, and acceptance of multiple realities and truths that sometimes resist standardization. The evaluator should hold a strong personal and professional commitment to equity, and preferably have experience evaluating other strategies to advance equity, so that they are nimble in applying lenses of equity and intersectionality and adapting as needed.

### VI. Scope of Work and Expectations

#### Scope of Work

This document is a request for qualifications rather than a request for proposals, and we do not expect applicants to propose a full evaluation plan in response. Through the RFQ process, we intend to select an evaluator who will collaborate with Trust staff and grantees to refine the learning and evaluation questions; develop an evaluation framework and learning plan; and design a flexible evaluation approach (data collection and analysis) to assess the desired outcomes of the Building and Bridging Power strategy.

#### Expectations of the Evaluation Consultant

In addition to the content expertise described above, we are seeking evaluators who:

- Center equity in all aspects of the evaluation (design, implementation and dissemination)
- Are able to establish respectful and authentic relationships with grantees and community members from different backgrounds and who may hold different philosophies
- Have a deep understanding of power and power building
- Share our commitment to the use of evaluation for learning, and have a clear and well-tested approach for helping grantees and foundation staff make sense of and apply evaluation data to strategic decisions
- Are skilled at facilitating group reflection and learning, and are willing to adapt the evaluation plan based on new information or needs
- Employ established and innovative evaluation approaches
- Bring novel ideas for dissemination of evaluation findings to multiple audiences
- Have, or have the capacity to quickly develop, a deep understanding of the historical, cultural and political context of organizing and advocacy in Colorado
- Are able to be inclusive of Spanish-speaking evaluation participants
- Can commit to a regular meeting schedule with Trust staff (via telephone, Zoom and/or in person) to provide updates, highlight challenges, brainstorm, or share new ideas and information
- Have the ability to complete the evaluation within the time frame and budget
- Are open to partnering with other evaluation contractors brought on to provide evaluation technical assistance to grantees of the Building and Bridging Power strategy
- Are willing to have their own work evaluated, through a meta-evaluation, learning assessment or other mechanism.
Expectations of The Trust
The Trust seeks to be an active co-creator and thought partner in the evaluation. We commit to:

- Upholding the contract terms and payment schedule
- Growing alongside the evaluation contractor as we experiment with ways to use evaluation in service of equity
- Making ourselves available to meet regularly and as needed
- Dedicating sufficient time to work with the evaluators on designing plans, processes and products that meet our needs and acknowledge our evolving thinking
- Identifying learning opportunities for grantees, and being receptive to learning opportunities for Trust staff identified by the evaluator
- Encouraging and supporting the involvement of grantees in evaluation and learning activities
- Identifying opportunities to present findings and learning at conferences, and partnering in abstract/proposal submissions
- Acknowledging power dynamics when they arise, and engaging in difficult conversations with openness and honesty
- Welcoming constructive and critical feedback
- Considering trade-offs that may be necessary as the strategy and/or evaluation plan evolves
- Ensuring that the evaluation is meeting the needs of The Trust. This may entail bringing on a third party to conduct a meta-evaluation, learning assessment or other type of review.

VII. Deliverables
The Trust and selected evaluator will agree upon final set of deliverables. However, anticipated deliverables include:

- An evaluation plan that includes a refined set of learning and evaluation questions (Note: we expect the plan to undergo regular revisions as the work and thinking of the grantees and The Trust evolves)
- A guiding framework for the evaluation
- Data collection tools
- A learning plan that identifies learning activities and opportunities
- A learning log, accessible to Trust staff, that tracks key decision points, learnings and changes as they happen
- Dedicated time and space to review evaluation activities and discuss successes and challenges, at least quarterly
- Provision and interpretation of organization-level findings to grantee organizations, as well as facilitation of sessions to generate insights, learnings and applications, at convenings, in person or via Zoom, as appropriate
- Submission of a final report to The Trust that compiles findings, lessons and recommendations for funders, community organizing groups and policy advocacy organizations.

VIII. Budget
The overall budget for the evaluation of the 4.5-year Building and Bridging Power strategy is $1.2 million. This amount is inclusive of all expenses related to carrying out the scope of work (supplies; travel, food and lodging for trips to Colorado; editing, etc.).
IX. Timeline and Key Events

Timeline
Dec. 10, 2019  Request for qualifications released
Dec. 17, 2019  Briefing webinar
Jan. 10, 2020  Letter of qualifications due
Feb. 3-4, 2020  In-person interviews with finalists
Feb. 7, 2020  Selection of evaluation firm
February 2020  Contract negotiated (issues of data ownership, internal processes, etc.)
Early March 2020  Contract finalized; selected evaluation team meets with Trust staff in person in Denver

Briefing Webinar
To better inform and answer any questions from prospective evaluators, The Trust will hold a webinar on Dec. 17, 2020 from 11 a.m. to 12:30 p.m. MST. At this webinar, we will provide an overview of the strategy, discuss the evaluation RFQ and answer any questions. Please register for the briefing webinar here. The webinar will be recorded and made available to potential applicants who are unable to attend the live presentation.

Interviews
Finalists will be invited to participate in an in-person interview at The Trust. Finalists are asked to bring lead evaluators and other key staff who will be directly involved in the work. Associated expenses for travel, food and lodging related to the interview, for up to four individuals per finalist, will be paid for by The Trust. Interviews are anticipated to occur the week of Feb. 3, 2020.

X. Requirements for Responses

To respond to this RFQ, please submit a proposal of no more than 12 pages answering the following questions. An additional, separate file of appendices (resumes, dissemination products and other supporting materials) should accompany the proposal. Please note that we do not expect submitted applications to describe an evaluation design. Instead, we are interested in understanding your team’s philosophy, values, expertise and early ideas for the evaluation. The first several months of the engagement will be used to develop a more robust evaluation design with the selected team. A complete application will consist of two separate files—the proposal and the appendices.

1. **Overview and philosophy of evaluation** (~1 page): Please tell us a bit about your team or organization. What is your philosophy of evaluation? How does it reflect principles of equitable evaluation and social justice? Do you anticipate any institutional barriers to an equitable evaluation approach?

2. **Composition of evaluation team** (~2 pages): Please describe your evaluation team. Who is the team lead, who will be involved in this work, and what skills do each of these team members bring to the work? How does this team reflect the diversity of Colorado? In an appendix, include a brief resume for all personnel listed (not part of the 12-page limit and to be included in the file with the supporting materials).

3. **Content and methodological expertise** (~4 pages): What are your team members’ experiences and expertise in the evaluation of community organizing and advocacy and
policy efforts? What ideas do you have for methodologies that could be used to address the evaluation questions posed above?

4. **Orientation towards learning** (~2 pages): What is your theory and philosophy about learning? How do you view the relationship between of evaluation and learning? How will you balance the need for both in this evaluation? What experience do you have identifying and meeting the learning needs of multiple stakeholders?

5. **Dissemination approaches** (~1 page): What ideas do you have for disseminating information to multiple audiences? Do you have experience in novel ways of sharing information? In an appendix, please submit two examples of products you have developed to share evaluation findings with lay audiences.

6. **Indicators of success** (<1 page): What does a successful evaluation look like? What does successful learning look like? How will you know if the evaluation is capturing the desired or best information to answer the evaluation and learning questions? How will you know if the learning process is adding value to the grantees’ and the foundation’s work?

7. **References** (<1 page): Please provide names and contact information for two references from previous clients, preferably from different sectors or industries.

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