



# The Fund for Workforce Equity

REQUEST FOR PROPOSALS: EVALUATION PARTNER

WORKFORCE MATTERS – JULY 2022

RESPONSES DUE AUGUST 26, 2022

APPLY AT [HTTPS://WORKFORCEMATTERS.SUBMITTABLE.COM](https://workforcematters.submittable.com)

## Overview

Workforce Matters invites proposals from researchers interested in conducting an evaluation of the Fund for Workforce Equity's first grantmaking cycle. The goals of this evaluation include:

- Clarify, document, and help to refine the Fund for Workforce Equity's underlying theory of change.
- Document the activities and outcomes of the implementation partners, which include:
  - Workforce Matters
  - The Fund for Workforce Equity Advisory Committee
  - Round One grantee partners
  - Fund for Workforce Equity consultants and technical assistance partners
- Assess the degree to which The Fund makes progress toward advancing the project goals during Round One.
- Compile key findings into engaging, accessible, and actionable products and assist The Fund with broadly disseminating lessons learned to key stakeholders.

The resulting evaluation products should provide guidance to *both* field partners and grantmakers on strategies to engage workers and learners of color in informing workforce policy and program design and implementation. The research team will be expected to integrate the perspectives and experiences of affected stakeholders into the evaluation, including workers and learners of color. Ideally, the evaluation partner will enable stakeholders learn in real-time to enable iterative improvements to the approach and inform our strategic direction.

Potential applicants should review the information and instructions in this Request for Proposals and submit their application by going to [www.workforce-equity.org/evaluation](http://www.workforce-equity.org/evaluation) by August 26, 2022.

## Background

Established in 2009, [Workforce Matters](#) is the national association for grantmakers investing in workforce development. Our network includes over 750 individuals representing more than 250 philanthropies. Workforce Matters draws on expert and practitioner knowledge and enables our members to work together to strengthen workforce development philanthropy such that it empowers workers, learners, and job seekers to realize their full potential; dismantles inequities based on race, gender, ability, and other individual characteristics; and advances equitable education and employment outcomes for youth and adults.

### About The Fund for Workforce Equity

Workforce Matters recently launched the [Fund for Workforce Equity](#), a new pooled fund that aims to center workers of color in workforce policy and program design and implementation. The impetus to launch this fund comes from Workforce Matters' [Racial Equity Framework for Workforce Development Funders](#),<sup>1</sup> which recommends that funders take steps to center workers and learners of color in in developing, supporting, and evaluating workforce initiatives, including by:

- Using asset-based, race-explicit, and systemic frames and language to describe workers, learners, and job candidates of color that acknowledge systemic causes of disparity;
- Investing in building worker power and agency as a part of workforce development; and

---

<sup>1</sup> For more detail on these recommendations, please see pages 10-14 of the [Racial Equity Framework for Workforce Development Funders](#).

- Authentically including, respecting, valuing, and using the perspectives of workers, learners, and job candidates of color in shaping and measuring the impact of investments in workforce development.

Since the framework was released in 2021, Workforce Matters has worked with our members to launch the Fund for Workforce Equity to devote resources to implementing this recommendation.

The Fund will provide flexible resources and support to workforce development organizations seeking to pilot and learn from new strategies as well as innovate on or extend existing strategies that:

- Authentically respect, value, and honor the skills and perspectives that workers, learners, and job candidates bring to the table in designing and implementing workforce programs and policies; and
- Invest in creating spaces for People of Color<sup>2</sup> to exercise their power and agency in developing and implementing workforce programs and policies.

In addition, the Fund for Workforce Equity will support the following strategies:

- **A Learning Community** for grantees to share promising practices and lessons learned.
- **Technical Assistance/Expertise** that provides grantees access to expertise and resources on human-centered design and other best practices for elevating worker and learner voices.
- **Evaluation and Learning** efforts that shares lessons from the initiative with grantees and the broader workforce field, and that supports funders in disseminating and investing in promising practices among their grantees.

Additional information about the Fund for Workforce Equity can be found on [the project website](http://www.workforce-equity.org):  
www.workforce-equity.org

## Anticipated Research Questions

The evaluator will be expected to collaborate with Workforce Matters, the Fund for Workforce Equity Advisory Committee, and Fund grantees to clarify and refine the research questions to be answered by this evaluation. Anticipated topics include:

- How were the funds used? How did these funds help to advance workforce equity?
- How and to what extent did organizations center workers of color in workforce policy and program design and implementation?
- What types of tools, strategies, or practices did organizations use to center workers of color in workforce policy and program design and implementation?
  - What are the outcomes of these approaches?
  - Is there evidence that increased learner/worker engagement leads to improved and more equitable workforce outcomes, especially for workers and learners of color?
  - What variables affect these outcomes?
  - What was the baseline, and what changed due to these investments, including with regard to grant resources, technical assistance, and the learning community?
- What will it take to expand the adaptation and use of effective strategies to center and amplify the voices of workers and learners?
  - What pre-conditions are necessary for organizations to undertake this work successfully?

---

<sup>2</sup> See “Terms and Definitions” on pages 7-9 of the [Racial Equity Framework for Workforce Development Funders](#).

- What tools, resources, and supports do workers and learners of color need to engage in this work successfully?
- What tools, resources, and supports do field partners need to find, support, and engage proximate leaders who are workers and learners of color?
- What strategies can philanthropy use to support field partners interested in undertaking this work? Are there ways we can be better partners to grantees?
- Sustainability and learning
  - What and how are workers and learners of color learning and/or benefiting?
  - What and how are grantees learning? How are grantees changing their behavior going forward based on participating in this initiative?
  - What and how are funders learning? How are funders changing their behavior going forward based on participating in this initiative?
  - Are there any implications for the workforce system that are emerging from this work?

## Consultant Scope of Work

The evaluation partner will use a range of data collection, information gathering, and analysis strategies to:

- Clarify, document, and help to refine the Fund for Workforce Equity’s underlying theory of change.
- Document the activities and outcomes of the implementation partners, which include:
  - Workforce Matters
  - The Fund for Workforce Equity Advisory Committee
  - Round One grantee partners
  - Fund for Workforce Equity consultants and technical assistance partners.
- Assess the degree to which The Fund makes progress toward advancing the project goals during Round One.
- Compile key findings into engaging, accessible, and actionable products, including an interim report and a final report, accessible to multiple stakeholders, and assist The Fund with broadly disseminating lessons learned to key stakeholders.

The resulting evaluation products should provide guidance to *both* field partners and grantmakers on strategies to engage workers and learners of color in informing workforce policy and program design and implementation. The research team will be expected to integrate the perspectives and experiences of affected stakeholders into the design and delivery of the evaluation, including workers and learners of color. Ideally, the evaluation partner will enable stakeholders learn in real-time to enable iterative improvements to the approach and inform our strategic direction.

## Project Term

An evaluation partner will be selected and notified by early September and must be ready to initiate research and information collection when Round One grantees are announced on or around October 15, 2022. We expect to make primarily one-year grant awards in Round One, with a grant period of November 1, 2022-October 31, 2023. An interim evaluation report would be expected June-July 2023 and a final report in February 2024. The Round One evaluation contract is expected to end no later than March 31, 2024.

## Project Budget

The budget for the evaluation will be between \$100,000 to \$150,000.

## Selection Process + Criteria

An evaluator will be selected based on the criteria outlined below by a selection committee comprised of volunteers from the Fund's Advisory Committee.

We welcome applications from a broad range of evaluation partners that bring diverse backgrounds and experiences, including partnerships between multiple independent consultants or firms. While it is unlikely that most applicants will satisfy all of the criteria listed below, the following qualifications will be key areas of consideration in proposal review and selection:

- Experience with, expertise in, and/or commitment to racial equity, including [Culturally Responsive and Equitable Evaluation](#) practices or related approaches.
- Experience with, expertise in, and/or commitment to centering worker and learner voices.
- Experience with and/or expertise in workforce development policies, programs, and strategies.
- Relevant research and evaluation experience.
- The extent to which the applicant presents a clear and coherent strategy for implementing the evaluation.
- The appropriateness and effectiveness of the proposed data collection, information gathering, and analysis strategies.
- Demonstrated ability to produce engaging, accessible, and actionable evaluation products.
- Efficacy and feasibility of the proposed approach, including the appropriateness of budget and the inclusion of a realistic project timeline.
- Operational considerations (organizational capacity, leadership, financial stability).

Applicants are asked to adhere to the instructions set forth in this RFP and include the information requested in Appendix A: Application Package Requirements. Applicants should submit their application through our [application portal](#), which is also linked from [www.workforce-equity.org](http://www.workforce-equity.org), by August 26, 2022.

### Terms and Conditions

- Late or incomplete applications will not be considered.
- The Fund will not pay any costs incurred in responding to the RFP.
- Receipt of one or more responses to the RFP does not commit the Fund to the award of a contract. The Fund reserves the right to accept or reject any or all proposals received, to negotiate the final terms of any contracts, or to cancel the RFP in whole or in part.

**The Fund for Workforce Equity is generously supported by the following organizations (as of 06/21/22):**

American Institutes for Research (AIR)  
 Ascendium Education Group  
 The Annie E. Casey Foundation  
 Cognizant Foundation  
 Cuyahoga County Workforce Funders Group  
 Deaconess Foundation  
 Fund for Our Economic Future  
 Conrad N. Hilton Foundation  
 The James Irvine Foundation  
 W.K. Kellogg Foundation  
 WES Mariam Assefa Fund  
 McGregor Fund  
 Northwest Area Foundation  
 Siemens Foundation  
 Strada Education Network  
 Solon E. Summerfield Foundation  
 Tipping Point Community  
 Walmart.org  
 The Harry and Jeanette Weinberg Foundation  
 Ralph C. Wilson, Jr. Foundation  
 Workforce Matters Supporting Members

**The Fund for Workforce Equity’s Advisory Committee Members are:**

Heidi Alcock, McGregor Fund	Lauren N. King, W.K. Kellogg Foundation
Cathy Belk, Deaconess Foundation	Loh-Sze Leung, Workforce Matters
Crystal Bridgeman, Siemens Foundation	LaShana Lewis, L.M. Lewis Consulting
Allison Gerber, The Annie E. Casey Foundation	Clair Minson, Sandra Grace LLC
Miguel Cambray, JPMorgan Chase	Michael Morris, Strada Education Network
Amanda Cage, National Fund for Workforce Solutions	Talia Nagar, Tipping Point Community
Alex Camardelle, Joint Center for Political and Economic Studies	Sarah Oldmixon, Workforce Matters
Elizabeth Cheung, Conrad N. Hilton Foundation	Jennifer Racho, Northwest Area Foundation
Patti Constantakis, Walmart.org	Ian Record, Ian Record Consulting
Lauren Crain, WES Mariam Assefa Fund	Vanessa Rivera, Solon E. Summerfield Foundation
Kimberly Dumont, AIR	Luis Sandoval, Building Skills Partnership
Susan Dundon, Ralph C. Wilson, Jr. Foundation	Kim Tabari, USC Equity Research Institute
Todd Greene, WorkRise and Urban Institute	Emily Timm, Workers Defense Project
Tuquan Harrison, The James Irvine Foundation	Kristen Titus, Cognizant Foundation
Marci Hunn, The Harry and Jeanette Weinberg Foundation	Kirstin Yeado, Ascendium Education Group

## Appendix A: Application Package Requirements

This information is provided for planning and informational purposes only. Please fill out and submit through the [applicant portal](#).

### Required Applicant Information

1. Lead Applicant Name (if applying as a partnership)
2. For each Lead Applicant and project partner:
  - a. Organization name
  - b. Mailing address
  - c. Website
  - d. Name, title, telephone number, and email address of CEO, President, or Executive Director
  - e. Name, title, telephone number, and email address of contact person for this proposal (if different)
  - f. EIN / Federal tax-exempt ID number (if applicable)

### Narrative Proposal

This will be submitted as an attachment online in the [applicant portal](#).

Applicants should address the following topics in a narrative proposal of no more than 3,000 words or approximately six pages:

1. Please provide a brief overview of the **experience, expertise, capabilities, and capacity** of your firm or partnership.
2. Please provide a brief overview of your **familiarity** with as well as any **relevant experience** or expertise you may have related to the following:
  - a. Integrating racial equity strategies into evaluation, including [Culturally Responsive and Equitable Evaluation](#) practices or related approaches.
  - b. Integrating the perspectives and experiences of affected stakeholders into evaluation.
  - c. Workforce development policies, programs, and strategies.
3. Please describe your **proposed approach** to conducting this evaluation, including:
  - a. The data collection, information gathering, and analysis strategies you will use to conduct this evaluation.
  - b. The types of data or information you anticipate collecting and how you will do so.
  - c. Your plan for integrating the perspectives and experiences of affected stakeholders into the evaluation
  - d. A description of key milestones and deliverables.
  - e. A project timeline.

## Additional Required Attachments

These attachments will be submitted online through the [applicant portal](#).

The following items will not count toward the Narrative Proposal word/page limit:

- 1) Brief **biographies and/or CVs/resumes** for key staff.
- 2) A **project budget**, including:
  - a. A basic line item budget that identifies how funds will be utilized.
  - b. A brief narrative budget that provides an estimate of the hours associated with each project deliverable.
- 3) **Up to two samples of (or links to) products** demonstrating experience with similar work.
- 4) Two professional **references** who can speak to the consultant(s) experience completing similar work, including name, phone number, email address, scope of services provided, and length of service.
- 5) The Workforce Composition Survey, which provides a **demographic profile** of your organization's board, leadership, and staff.
- 6) If applicable, please provide any written **race, equity, and inclusion (REI) statements** or commitments that your organization has adopted.





## Workforce Composition Survey

*Adapted with permission from the Annie E. Casey Foundation*

This template is provided for planning and informational purposes only. Please fill out and submit through the [applicant portal](#).

Workforce Matters is a national network of grantmakers that draws on expert and practitioner knowledge and works together to strengthen workforce development philanthropy such that it empowers workers, learners, and job seekers to realize their full potential; dismantles inequities based on race, gender, ability, and other individual characteristics; and advances equitable education and employment outcomes for youth and adults.

As we launch our first collaborative funding initiative, the Fund for Workforce Equity, Workforce Matters is committed to intentionally incorporating diverse cultural experiences, perspectives and ideologies, with a particular focus on centering the voices and lived experiences of workers and learners of color.

Therefore, we are asking applicants and potential consultants to the Fund to complete the following Workforce Composition Survey.

The race, ethnicity and gender categories used in the survey follow those that the Equal Employment Opportunity Commission requires employers to use for reporting purposes. Workforce Matters recognizes these categories may not be inclusive or consistent with how people identify themselves; however, they are the only uniform way in which employers collect and report data. Workforce Matters will continue to review and consider modifying or expanding these categories in the future. If your organization uses additional categories when collecting workforce data, you may include this information as an attachment at the end of the survey.

Complete the survey for your organization as a whole, counting each person only once based on the individual's primary role.

University systems, state agencies and large institutions should provide information only for the school or department that is applying for a contract or grant from Workforce Matters.

In a fiscal sponsor/agent relationship, the data should represent the ultimate beneficiary of a grant or contract from Workforce Matters.

Organizations may attach additional data on race, ethnicity and gender in their workforce if they collect data in categories beyond the ones presented.

For questions or assistance, email [FWE@workforce-matters.org](mailto:FWE@workforce-matters.org)

Organization

---

DBA/AKA (if applicable)

---

Department (if applicable)

---

### CEO/EXECUTIVE DIRECTOR

	Male	Female	Non-Binary
White			
Black or African American			
Asian			
Native Hawaiian or Other Pacific Islander			
Hispanic or Latino			
American Indian or Alaska Native			
Balance (or Other)			
<b>Total</b>			

### BOARD MEMBERS/TRUSTEES

	Male	Female	Non-Binary
White			
Black or African American			
Asian			
Native Hawaiian or Other Pacific Islander			
Hispanic or Latino			
American Indian or Alaska Native			
Balance (or Other)			
<b>Total</b>			

### SENIOR MANAGEMENT LEVEL STAFF

	Male	Female	Non-Binary
White			
Black or African American			
Asian			
Native Hawaiian or Other Pacific Islander			
Hispanic or Latino			
American Indian or Alaska Native			
Balance (or Other)			
<b>Total</b>			

**PROGRAMMATIC/PROFESSIONAL STAFF**

	Male	Female	Non-Binary
White			
Black or African American			
Asian			
Native Hawaiian or Other Pacific Islander			
Hispanic or Latino			
American Indian or Alaska Native			
Balance (or Other)			
<b>Total</b>			

**ADMINISTRATIVE/CLERICAL/SUPPORT STAFF**

	Male	Female	Non-Binary
White			
Black or African American			
Asian			
Native Hawaiian or Other Pacific Islander			
Hispanic or Latino			
American Indian or Alaska Native			
Balance (or Other)			
<b>Total</b>			