



REQUEST FOR PROPOSALS INVESTMENT READINESS PROGRAM EVALUATION

Proposal Due: July 24, 2020

The Canadian Women's Foundation invites proposals from qualified consultants to plan, design, and conduct the evaluation of our Investment Readiness Program. Evaluation work is to be completed collaboratively with the Canadian Women's Foundation and grantees beginning July 2020.

The successful Evaluator(s) will have proven experience in tracking and analyzing participant outcomes, project evaluation, project management, an understanding of gender-based programming, and experience evaluating social innovation initiatives.

About the Canadian Women's Foundation

The [Canadian Women's Foundation](#) is Canada's public foundation for women and girls and is now one of the ten largest women's foundations in the world. Since 1991, thanks to generous donors across the country, we've invested in more than \$90 million in 1,900 community programs across Canada supporting women and girls to move out of violence, out of poverty, and into confidence and leadership. We [fund programs](#) across Canada, prioritizing the communities where the need is greatest. These programs address four urgent issues: prevention of gender-based violence, women's economic development, girls' empowerment, and inclusive leadership.

About our Investment Readiness Program (IRP)

As one of the partners in the Investment Readiness Program announced by the Federal Government in June 2019, the Canadian Women's Foundation will receive \$3 million over two years to help social purpose organizations become investment ready to access the new Social Finance Fund, planned to launch in 2020 and expand the role of social finance in the women's sector.

Over three funding cycles of this 2-year pilot Investment Readiness Program, the Canadian Women's Foundation plans to fund approximately 40 social purpose organizations. Each funded organization will receive non-repayable capital (i.e. grant) of up to \$50,000.

The Foundation believes that promoting entrepreneurship and innovation, as well as the growth of micro-, small- and medium-sized enterprises, helps women develop greater economic prosperity. With more knowledge and experience in the use of social finance mechanisms and tools, the women's sector will be better able to support these enterprises.

Our IRP Program Goals

Through the Investment Readiness Program funding, the Foundation aims to boost women's sector participation in social innovation and social finance. This is especially important for organizations that serve women who face multiple barriers and are underrepresented in this field.

The Foundation's IRP supports and encourages the growth and readiness of women-serving organizations to join the social innovation and social finance ecosystem. This may include support to social purpose organizations that currently do not consider themselves part of that ecosystem. The Foundation seeks to prioritize funding to organizations that reach women who face multiple barriers, in communities where the needs are greatest.

The Canadian Women's Foundation prioritizes inclusion and addressing barriers to access. Our vision of gender equality for all in our grantmaking is expressed in our prioritization of women, girls, trans, two-spirit, and non-binary peoples who face multiple challenges. In recognition of the long histories and ongoing effects of colonization, racism, violence and exclusion, the Canadian Women's Foundation has increased our focus on women, girls, trans, two-spirit, and non-binary peoples from First Nations, Métis, and Inuit communities, Black communities, and those living with disabilities as well as two-spirit, lesbian, gay, bisexual, trans, queer, questioning, intersex, pansexual, androgynous, and asexual (2SLGBTQI+) peoples.

Through the IRP, the Foundation aims to support organizations along the Investment Readiness Continuum equally. No priority is given to organizations at early, mid, or growth stages of social enterprise development.

Overall, we aim to:

- Increase the number of women-led and/or women-serving social purpose organizations in the social finance ecosystem and support organizations in becoming investment ready and potentially access future repayable capital
- Build awareness
- Enhance capacity
- Increase accessibility to expert advice and information
- Contribute to learning on what works
- Apply a gender lens throughout using GBA+

Applicants could apply for funding to access services/supports that will help advance a Social Purpose/Social Innovation/Business Initiative that they are developing, embedding, or scaling.

About our Social Purpose Organizations (SPOs):

SPOs (grant recipients) are social purpose organizations operating as a charity, qualified donee or non-profit organization that sells goods and/or services in the marketplace for the dual purpose of generating income and achieving a social, cultural and/or environmental mission. Charitable organizations, qualified donees and/or non-profit organizations with charitable status can also partner with for-profit social ventures with a related mandate to deliver projects. One of the goals of the IRP is to facilitate connections between the charitable and non-profit sector with the for-profit social venture sector.

In total, up to 40 social purpose organizations will receive IRP funding to increase women's sector participation in the social finance ecosystem and move social purpose organizations across the continuum of investment readiness.

- Cycle 1 - In January 2020, the Canadian Women's Foundation approved funding for 12 social purpose organizations, each receiving up to \$50,000. The [following initiatives](#) were selected for funding in Cycle 1.
- Cycle 2 - In June 2020, 17 social purpose organizations will be approved for funding of up to \$50,000 per organization.
- Cycle 3 - In February 2021, 10-12 organizations will be approved for funding of up to \$50,000 per organization.

Descriptions of grantee projects selected in cycles 2 and 3 will be shared with the selected evaluator once grantees are approved and finalized for funding.

In addition to grant-making, the Foundation supports SPOs through a variety of capacity building efforts such as workshops, peer-to-peer learning opportunities and webinars. By facilitating knowledge sharing and learning among the grantees, we anticipate improving organizations' ability to deliver strong initiatives and their capacity to progress towards investment readiness.

Grantee Reporting Timeline

Grantees are required to submit interim and final reports for projects. Grantees must complete final reporting to the Foundation by March 31, 2021. Of note, grantees are permitted to continue working and completing their respective social purpose projects well into 2021.

We anticipate a total of two Interim Reports (project status/update reports) from grant recipients from cycle 1 and cycle 2, and a final report from grant recipients in all three funding cycles. Of note, since cycle 3 grant recipients will be approved in early 2021, final grantee reports will not be available as a data-collection point for the selected Evaluator.

About the Selection Process

To select grantees for funding, the Foundation has prioritized the following general criteria:

Social Purpose / Social Innovation / Business Initiative:

- Clarity of Initiative
- Potential feasibility or viability of Initiative
 - Community / Customer need
 - Fit between identified need and Initiative design
 - Evidence of Strong Business Model
- Potential Initiative impact (breadth & depth of impact)
 - On social/environmental challenges
 - On women and other marginalized groups (as listed in CWF grant guidelines)
- Timing of application (key unlocking moment for this Initiative to receive funding)
- Impact on broader organization if applicable (how might capacity building support the
- Social Purpose/Business Initiative and the organization that is applying for funding, or
- the partners you are working with)
- Community/Funder Backing

- Demonstrated support & traction for this idea either through other funding, needs assessment, stated desire/need for this product/service/policy, community consultations, etc.

Related to the Organization:

- For an established organization:
 - Strong organization with a track record
 - Strong team open to learning, with a commitment of time and energy
 - Openness to participate in evaluation processes
- For a new or emerging organization:
 - Strong partnerships and community buy-in
 - Strong leader with a commitment of time, energy and openness to learn
 - Openness to participate in evaluation processes

Related to the Proposal:

- Alignment with Investment Readiness Program objectives
- Targeting priority populations

About the Evaluation

Evaluation is an integral part of the Foundation's approach to grant-making and philanthropy. It ensures we are continually funding appropriate, dynamic initiatives and supplies the tools to demonstrate impact to our donors and other stakeholders. Evaluations are also used externally to support knowledge transfer for grantees and the wider social service sector.

As we learn about our grantees, the people they serve, their organizational structure, their community context, and their analysis and approach, we also learn to better support them to fulfil their goals and meet community needs. We constantly look for avenues to support our grantees to amplify their impact.

We are seeking a partnership with an Evaluator who embraces a collaborative and strategic learning approach—i.e. the evaluation strategy should be flexible to ensure grantees are supported to recognize emerging issues and adapt responses accordingly. This will entail strong collaboration and communication with both grantees and Foundation staff. Through evaluation strongly informed by grantee knowledge, we hope that grantees and Foundation staff will be able to get a sense of how the funded interventions are building strength at the community level and revolutionizing the social innovation and social finance ecosystems.

Evaluator(s) will be asked to develop an evaluation strategy that considers the following:

(1) Individual-Level Change:

- Are women-led, women-serving social purpose organizations meeting their goals?
- Is the program building women's social finance/social enterprise assets?
- Are women-led/women-serving social purpose organizations moving towards investment readiness?

(2) Practice Change:

- To what extent is knowledge sharing within the grantee cohort contributing to practice change?
- Is there evidence of reflective practice with the integration of new knowledge (e.g., enhanced gender analysis, decolonization strategies, etc.)?
- How are social purpose organizations identifying and responding to emerging social innovation issues?

(3) Sector or Policy Change:

- What policy areas are grantees identifying as relevant to their work in developing, launching and/or scaling social enterprises/social finance ventures?
- Are grantees increasing their capacity to lead / support advocacy towards systemic change?

In addition to providing important insights into the progress of the grantee cohort, information collected through the evaluation will help the Foundation to identify gaps in our approach to funding and capacity building. The Evaluator(s) will need to remain sensitive to the potential disconnect between expectations on the part of the Foundation with respect to the scope of the evaluation work and what the grantees can realistically manage.

Evaluation Consultants Role and Criteria for Selection

Working in collaborative partnership with the grantees and the Canadian Women's Foundation, the Evaluator(s) will design and implement a formal evaluation strategy built on strong collaboration in the following areas:

- Developing evaluation questions, outcome indicators, and methods of and for data collection;
- Identifying and implementing a process for collecting and submitting information through surveys, interviews, and other innovative data collection methods, and regular program reporting; and
- Creating a system for providing regular feedback that will deepen impact by identifying key opportunities as they arise and assisting to trouble-shoot and provide amendments to the research and evaluative process where necessary.

The Evaluator(s) will be able to provide important information that will allow the individual programs and the Foundation to innovate and use research productively to enhance program functions.

The Evaluator(s) will integrate training and support for grantees and will transfer knowledge and skills about data collection and its value to build the capacity of grantees as part of this strategy.

Qualifications

We are looking for Evaluator(s) who:

- Have knowledge of and experience of social enterprise development, social finance and/or social innovation
- Have knowledge of and experience in formative, process, and impact evaluations, project logic models, theory of change, and network development
- Have experience tracking, measuring, and analyzing outcomes and change at the participant level, including working with at-risk and vulnerable participants
- Offer innovative ideas and methods of data collection and analysis
- Have experience working with women living on low incomes and who are socially, economically, and politically marginalized
- Have well-developed consultation and facilitation skills and are comfortable working with a wide range of community organizations; experience in Indigenous and multicultural settings is an asset
- Have demonstrated success in project management, effective leadership skills, and an understanding of organizational development

- Are proficient and highly effective communicating via teleconference and web-based conferences
- Work well both independently and in a collective team environment
- Work in both French and English at a professional level

Project Outline and Deliverables:

The key components of the Evaluator(s) work plan are:

a. Review Investment Readiness Program documents

It is important that the Evaluator(s) become familiar with the Foundation's Investment Readiness Program resources including the grant guidelines, specific resources and tip sheets as well as specific IRP data collection points from the application process (shared with the selected Evaluator). These documents will ground the evaluation work.

b. Developing an Evaluation Framework (and associated tools):

The Evaluator(s) will propose an evaluation and learning strategy for the Investment Readiness Program, to be finalized in collaboration with Foundation staff. The Evaluator(s) should highlight a timeline for communications and reporting systems, ongoing course correction, monitoring of activities, and feedback from grantees.

c. Implementing the Evaluation & Reporting:

The Evaluator(s) will take a lead role in determining the methods and timing of data collection. We are interested in exploring creative ways to collect and use both qualitative and quantitative data that respects women from communities that have been traditionally marginalized.

The Evaluator(s) will not be expected to collect all the information but will train and support grantees to do this work, ensuring knowledge transfer to grantees.

The Evaluator(s) will be responsible for analyzing the data collected and preparing 1 or 2 reports to the Foundation and grantees in accordance with the established objectives.

The Evaluator(s) will be responsible for summarizing key findings from the Foundation's Investment Readiness Program and synthesizing into 1-2 brief, public-facing document for public use, such factsheets, one-pagers, or other concise shareable pieces, which could include graphics, photos and/or quotes from grantees.

Contract and Budget

The successful candidate(s) shall enter into a contract with Canadian Women's Foundation from July 2020-March 1, 2021. The maximum payment for work on this project is \$35,000. The payment schedule will be shared at the interview stage with shortlisted candidates.

Please submit a detailed budget including per diems and number of days, based on the proposed work plan, deliverables, and contract duration. Expenses such as online meetings (travel if necessary), conference calls, data entry, graphic design or meeting/resource materials should be listed separately, to be considered by the Foundation as additional expenses.

Proposal Requirements

The evaluation proposal should include:

- a. Approach to working with the Canadian Women's Foundation and grantees in the design, planning, and implementation of the evaluation framework and strategy
- b. Effective methods of data collection proposed, including the selection or development of tools such as questionnaires or other forms of information collection and frequency of data collection
- c. Approach to identifying indicators, defining "success" and measures to be used to track progress towards moving women out of poverty, as well as practice and policy change
- d. Strategy and plan to train and support grantees in the data collection and evaluation process
- e. Method(s) to analyze information and capture learnings gathered from participant interviews and other forms of data collection
- f. Approach to working with the target populations
- g. Anticipated challenges and approach(es) to addressing those challenges
- h. Anticipated work plan and timelines, including all activities and reporting
- i. Qualifications and experience of evaluation consultant in relation to participant outcomes, project evaluation, capacity building, and policy change. A sample or description of a relevant previous project would be helpful. If you work as an evaluation team, clearly indicate areas of specialization and how responsibilities will be divided.
- j. Budget, including per diems and anticipated number of days for each of the consultant involved
- k. Three references for the individual or team that reflect relevant experience
- l. Information about any previous work or project that might be considered to be in conflict with the values of Foundation

Proposal Submission

Please submit proposal and/or direct questions to:

Sagal Dualeh - Director, Investment Readiness Program

sdualeh@canadianwomen.org

Proposals must be received no later than **5:00pm EST on July 24, 2020**. Interviews will be conducted with shortlisted candidates in July 2020.