

# Request for Proposals: Learning & Evaluation

January 15, 2020

The San Francisco Foundation seeks a qualified consultant(s) and/or firm(s) to evaluate the Partnership for the Bay's Future. Specifically, the Foundation seeks proposals to initiate a developmental evaluation of the Challenge Grants for Housing Protection and Preservation, a program initiated through the Partnership's Policy Fund. Proposals should include (1) refinement of the Policy Fund's learning questions, (2) support for rapid learning among Challenge Grant fellows and jurisdiction and the Partnership's advisory committee and key stakeholders, and (3) the introduction, passage, and implementation of transformative policies that promote tenant protections and the preservation of affordable housing.

We seek partners who share our commitment to advancing racial equity within the region. Therefore, we ask that proposals indicate how racial equity and economic inclusion will be centered in the evaluation design, execution, analyses, and dissemination of learnings.

Proposals should not exceed \$225,000.

All proposals are due by Friday, February 14<sup>th</sup> and will be reviewed by foundation staff. After narrowing down the pool of applicants, up to three candidates will be invited to review their proposals with staff between February 24<sup>th</sup> and March 6<sup>th</sup>. And a final decision is expected by Tuesday, March 10<sup>th</sup>. The evaluation is expected to launch by Monday, March 30<sup>th</sup>.

Please direct proposal inquiries to:

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*Please submit responses via email to:  
Wendy Guzman at [Wguzman@sff.org](mailto:Wguzman@sff.org)  
by Friday, February 14th.*

## I. BACKGROUND

### a. ABOUT THE SAN FRANCISCO FOUNDATION

Founded in 1948, the San Francisco Foundation is one of the nation's largest community foundations — a grantmaking public charity dedicated to improving life within a specific local region. Our mission is to mobilize resources and act as a catalyst for change to build strong communities, foster civic leadership, and promote philanthropy in the San Francisco Bay Area.

Together with community leaders, nonprofits, and donors, we are committed to [advancing racial equity and economic inclusion](#) to ensure that everyone in the Bay Area has the opportunity to become financially stable, to live in a safe and affordable home, and exercise their political voice.

### b. THE PARTNERSHIP FOR THE BAY'S FUTURE: COLLECTIVE IMPACT

The Partnership for the Bay's Future is a collaborative effort aimed at advancing our region's future by solving its interconnected challenges of housing, transportation and economic opportunity. Given the depth and breadth of the region's housing crisis, the Partnership is starting with a focus on housing. Through the Policy Fund the Partnership aims to expand and protect the homes of up to 175,000 households over the next five years.<sup>1</sup> Bold policy change is needed to address our housing shortage and housing affordability challenges to reach a scale of impact commensurate with the housing crisis. As a regional collaboration, the Partnership for the Bay's Future focuses on San Francisco, San Mateo, Santa Clara, Alameda, and Contra Costa counties—as well as the nearly 80 cities and towns they contain—to share ideas and develop cohesive policies that protect families and individuals burdened by high rents, and preserve and produce affordable housing.

The [Partnership for the Bay's Future](#) includes three components.

**The Policy Fund:** Leveraging its convening power and civic leadership, the San Francisco Foundation is leading the Policy Fund.

**Policy Working Group:** The regional policy working group includes corporate, philanthropic, community, and government leaders. In recognition of the region's housing crisis, the policy working group is focused on advancing a 3P's agenda at the local and regional levels that includes protections for tenants, preservation of existing affordable housing, and production of new housing.

**The Bay's Future Fund:** The Local Initiative Support Corporation (LISC), a national non-profit community development financial institution, manages the \$500 million Bay's Future Fund. BFF provides a range of products to support innovative and scalable approaches to the preservation and production of affordable and mixed-income housing.

## Partnership components

### The Partnership

Build the political and public will to advance policies and increase resources and innovation for greater housing protection, preservation and production through investments, communications, and advocacy



#### Policy Working Group *Managed by SFF*

Members advance needed policy changes across the region and at the state level, guided by Partnership principles



#### Investment Fund *Managed by LISC*

Demonstrate the viability of innovative approaches to producing and preserving affordable, mixed and middle-income housing that can scale



#### Policy Fund *Managed by SFF*

Enable jurisdictions to effectively stem the tide of displacement, and preserve and produce affordable housing by providing resources and technical assistance for local policy change

**Partnership Advisory Board:** The Advisory Board includes investors from the philanthropic and corporate sectors, public sector and policy experts, as well as community leaders. It is intended to support the Policy Fund and create a bridge between the Policy and Bay's Future Funds.

### c. THE POLICY FUND: INCLUSIVE POLICY MAKING TO ADDRESS THE REGION'S HOUSING CRISIS

The Policy Fund is using two grant programs as its primary tools to help local and regional governments create and successfully implement policies that enable more Bay Area residents to remain in their homes in their communities.

**Challenge Grants for Protection and Preservation:** Large awards (a two-year mid-career fellow, support for community partners, and technical supports) are designed to assist jurisdictions as they pursue ambitious, comprehensive protection and preservation policies. Challenge grants will be awarded to seven jurisdictions and their community partners to pursue policy solutions over a two-year period. Cohorts of the fellows, community partners, and jurisdictions will be supported as a learning community.

**Breakthrough Grants for Production and Preservation:** Jurisdictions that have the potential to develop affordable housing at scale will be awarded grants and technical assistance and convened to collaborate and

learn together on shared challenges. Breakthrough grants will be offered in 2020 and are not covered by the RFP.

**d. THE CHALLENGE GRANTS: A FOCUS ON PROTECTION AND PRESERVATION**

Challenge Grants were open to cities and counties in the lower five Bay Area counties of Alameda, Contra Costa, San Francisco, San Mateo, and Santa Clara that are currently experiencing, or at risk of experiencing displacement or exclusion of low-income and people of color communities. The San Francisco Foundation is currently in the final stages of selecting the Challenge Grant jurisdictions.

Up to seven Bay Area jurisdictions will receive a mid-career fellow to increase capacity for this work, peer cohort support for regional impact, preferential status when applying for flexible capital from the Partnership's Fund for the Bay's Future Fund, support for a community partner organization, and access to technical assistance.

Over two years, chosen jurisdictions are expected to partner with community groups to pass and initiate the implementation of a comprehensive package of proposed tenant protection and affordable housing preservation policies.

## **II. EVALUATION OVERVIEW**

**a. CONTEXT**

Housing is an urgent issue within the Bay Area. Between 2010 and 2016, the region added 722,000 jobs but only built 106,000 new housing units. As a result, housing burdens for renters have increased and homelessness is at an all-time high, particularly in low-income communities of color. At the same time, more than 220,000 East Bay residents commute to jobs in San Francisco, the Peninsula and Silicon Valley with an additional 190,000 workers commuting from outside of the nine-county region.

Recognizing the urgency of this moment, government leaders are looking for short and long-term solutions. The 2019 California legislative season led to significant policy wins with Governor Newsom signing 11 housing bills into law. As a result, tenants are protected from rent gouging and no cause evictions, it is easier to repurpose unused public land for affordable housing, and ABAG and MTC are now allowed to pursue regional funding which can be used to build affordable housing in the Bay Area. Local jurisdictions are also taking steps to deal with the housing crisis.

**b. EVALUATION FRAME**

The San Francisco Foundation is requesting proposals (RFP) for a two-year developmental evaluation to support the initial phase of evaluating the Policy Fund. It is expected that this initial work will test the theory of change, refine learning questions, and support rapid learning to maximize the program's impact. And while this RFP is specific to this initial phase of the work, the selected evaluators will likely have an advantage for later stage RFPs.

As such, the San Francisco Foundation is seeking an evaluative partner with:

- a demonstrated commitment to racial equity,
- knowledge of the region,
- expertise in housing, and
- experience evaluating the impact of policies.

**c. LEARNING AND STAKEHOLDER ENGAGEMENT**

With a focus on the Challenge Grant, evaluators will be expected to engage key Policy Fund stakeholders. This includes, but is not limited to the San Francisco Foundation, Challenge Grant jurisdictions, fellows, and technical assistance providers, and the Partnership Advisory Board. The evaluation should facilitate rapid learning among Challenge Grant participants. Learning should be community-informed and data-driven with an aim towards continuous improvement for maximum impact.

**d. TESTING THE THEORY OF CHANGE**

The Challenge Grant was carefully designed with broad input. As such, the design is aimed at accounting for the multiple issues jurisdictions face in trying to advance equitable housing policies.

**Political Will:** Without political will, jurisdictions are unlikely to pass comprehensive and equitable housing policies. And so participating jurisdictions must include the participation of at least two elected officials.

**Public Will:** Public will can be critical to building political will and/or providing political cover. To build political will all participating jurisdictions have a community engagement strategy and must have a community organization as their designated partner. Additionally, jurisdictions can receive communications technical assistance.

**Capacity:** Recognizing that many jurisdictions have a limited number of staff focused on housing, each participating jurisdiction will have a mid-career fellow placed within their jurisdiction.

**Capital:** The Partnership Advisory Board will help ensure continuity between the Policy and the Bay's Future Funds providing Challenge Grant jurisdictions with access to capital to support the preservation of affordable housing.

**Regional Collaboration:** Recognizing the solutions are needed at a regional scale, Challenge Grant jurisdictions participate in cross-jurisdiction meetings. These meetings are intended to be a place of learning, problem-solving, and collaboration.

## **e. PRELIMINARY LEARNING QUESTIONS**

As part of the initial phase of the evaluation of the Policy Fund, the evaluators will work with stakeholders to vet, refine, and prioritize learning questions.

### **Challenge Grant Jurisdictions:**

- What are the enabling conditions for innovative policies that advance tenant protections and preservation of affordable housing?
- How does the cohort of jurisdictions enable protection and preservation policies? Are they able to leverage learnings and policy actions across jurisdictions?
- How does each jurisdiction and the regional cohort help to advance racial equity? What are the particular impacts for communities of color?

### **Challenge Grant Fellowship Program:**

- What roles do fellows play in expanding the capacity of Challenge Grant jurisdictions?
- What role do fellows play in facilitating the passage and implementation of policies to protect tenants and preserve affordable housing?
- Over time, does the fellowship create a broader pool of regional government employees with a commitment to equitable housing?

### **Community Partners:**

- What role do community partners play in creating the public and political will to advance protection and preservation policies?
- How does community engagement enable and/or accelerate policy change?
- How do community partners represent and engage with communities of color?

#### Partnership Advisory Board:

- Does the advisory board enhance the success of the Policy Fund and its work with different jurisdictions? If so, how? Examples might include:
  - Thinking through indicators of progress
  - Supporting outreach
  - Advocacy and implementation of Challenge Grant policies?
- How does the advisory board accelerate the Partnership's impact by leveraging the investment fund (Bay's Future Fund) to accelerate the policy change within the Challenge Grant jurisdictions?
- How do advisory board members mentor and support fellows? And what is the impact of those relationships?

### III. QUALIFICATIONS

The San Francisco Foundation is seeking experienced and skilled evaluators that can demonstrate the following:

- an orientation towards racial equity;
- experience with developmental evaluation and in utilizing evaluation within fast-moving collaboratives;
- existing knowledge about housing (issue), the Bay Area Region (geography), and the history of racialized housing policies;
- existing knowledge about policy change, policy processes and the intersection with politics, history of policy change (including movement organizing) and how policies have been used as an obstacle to racial equity; and
- willingness and experience in documenting learnings that are shared with the broader field.

### IV. PROPOSAL SUBMISSIONS

Proposals should be no more than six pages with an additional eight pages allowed for work samples. Proposals should include the following:

#### EXPERTISE, BACKGROUND & QUALIFICATIONS

- i Please describe the specific skills and experience of each team member. Provide a brief narrative that describes the individual or team's familiarity and demonstrated expertise in racial equity and economic inclusion, developmental evaluation, rapid learning, and policy change.

#### APPROACH, FRAMEWORK, DESIGN, AND TIMELINE

- i Briefly describe your experience in and approach to codesigning an inclusive and equitable evaluation.
- ii Propose an initial framework that could be used to cocreate and refine the design.
- iii Propose an initial design which 1) illustrates stakeholder engagement, 2) monitors impact, 3) and supports ongoing learning.
- iv Propose a timeline with milestones.

#### BUDGET

- i We estimate the budget to be up to approximately \$225,000, but we want to understand the costs that match your proposed scope. Please propose a budget and include breakdown of costs as well as allocations for sub-consultants if applicable.

#### WORK SAMPLE

- i Submit no more than three work samples which illustrate your experience and expertise as it relates to this RFP.

Please submit your proposal to Wendy Guzman at [wguzman@sff.org](mailto:wguzman@sff.org) by Friday, February 14<sup>th</sup>. Decisions will be made by Tuesday, March 10<sup>th</sup>. Estimated project start date is Monday, March 30<sup>th</sup>.