Partners for Rural Transformation

Request for Proposals:
Evaluation / Research Partner
Develop Shared Impact Measurement Framework and Model Capture for Six Community Development Financial Institutions working in Persistent Poverty Regions

Responses due by: September 15, 2020

Background
Perhaps nowhere else in the United States is the structural exclusion by place and race more self–evident than in persistent poverty America. Of the 395 persistent poverty counties, 8 out of 10 persistent poverty counties are non-metro – home to nearly seven million people. Additionally, nearly all rural majority black, Latino and Native American counties are also persistently poor. Notably, significant overlap between persistent poverty and the nation's highest rates of county unemployment and unbanked households exists. Likewise, a strong relationship between persistent poverty and low health outcomes also occurs. In fact, 85% of the nation's persistent poverty counties rank in the bottom half of counties in health outcomes in each respective state as measured by the *County Health Rankings*.

Guided by a vision of a future where persistent poverty no longer exists, six Community Development Financial Institutions (CDFIs) located in and serving regions with a high prevalence of persistent poverty have been working together for a number of years to advance the vision through the Partners for Rural Transformation. Collectively, the Partners for Rural Transformation serve 75% of the nation's persistent poverty counties with a diverse set of development finance approaches informed by the voices and priorities of local people. Over the last 10 years, the partner CDFIs have deployed over $2 billion and have changed the lives of millions of people.

Purpose of Request for Proposals (RFP)
The purpose of this RFP is to identify a research partner(s) (herein "researcher") who will conduct a rigorous analysis of the work of the Partners for Rural Transformation, collectively and individually, and document the common, yet unique aspects of the work in places where the development degree of difficulty is high and resources are scarce. Ultimately, the product(s) created by the researcher will be used to fuel a policy agenda directed towards the expansion of public, private and philanthropic investment in places of persistent poverty to advance economic mobility and health equity.

The researcher will complete two distinct, but complementary, bodies of work – a Shared Impact Measurement Framework and Model Capture.

Shared Impact Measurement Framework

Develop a shared impact measurement framework identifies metrics and a methodology to document the impact of the work of CDFIs in persistent poverty counties. Development of a successful framework will include the following:

1. Documentation of the capacity and core activities of each Partner—including CDFI activities such as loan provision across multiple sectors, technical assistance, financial coaching, and leadership development;
2. Research of frameworks for measuring the effects of community development on local and regional economies, as well as other conditions that promote advancement of racial and health equity;
3. Formalization of a framework for measuring the shared impact at the individual, household, community and regional level of PRT members within the context of the PRT Theory of Change
4. Drawing on data procured from individual CDFIs and community level indicators garnered from the U.S. Census Bureau and other sources, implementation of the framework to gauge the effects of community development activities to measure community level change.

Deliverables:

- An analysis and inventory of the capacity and core activities of each of the Partners. Develop and share a template for each organization to complete that captures each line of business, specifically identifying capacity and core activities. Synthesize the information and provide a descriptive analysis.
- A framework (including metrics and a methodology) to measure and document the shared impact of the Partners' collective efforts. The framework will capture change at the community level centered on social and economic opportunity, healthy equity, and development of local leadership capacity facilitated by the CDFIs across their regions.
- A synthesis of the research and data gaps that need to be filled in order to move the field forward. This will be used by the Partners as an input to inform the development of a research agenda.

Model Capture

Using the shared impact measurement framework, the research partner will assess and document the organizational model used by each CDFI to achieve impacts in persistent poverty places through engagement with PRT leadership. In collaboration with the organizations, and drawing on a mixed methods approach, the successful proposal will outline an approach to capturing the organizational model of each Partner, and will include the following:

1. Description of the unique conditions of place facing communities and individuals in rural and small cities centered in persistent poverty counties served by the CDFIs;
2. Analysis and documentation of each Partner organization's theory of change and organizational models, including the collection of strategies and

approaches taken to advance social and economic opportunity and health equity in their respective region.

3. Identification and description of how opportunities to serve persistent poverty places and individuals living in them take place within the Partner organizations;
4. Documentation of strategies and approaches taken to fund opportunities;
5. Capture of strategies for monitoring impact and documenting how information captured is used to advance the missions of the Partner's organizations;
6. Dissemination of findings to key audiences and development of a common vocabulary across persistent poverty regions for communicating what improves conditions in persistent poverty places.

Deliverables:
- Drawing on case study methods, production of a white paper that describes each of the six Partner's organizational models and compiles the major impact lessons learned from each of the six organizations individually and as a collective - to advance social and economic opportunity and health equity in their respective region.

Proposals
Respondents should propose a research plan, timeline, and budget. The proposal will also discuss the plan for collaborating with the CDFI partners, credibly addressing the challenges of working with a nationwide group of rurally located stakeholders. Each proposal should include the following sections:

- Cover letter;
- Proposed research design and timeline with proposed benchmarks and deliverables;
- Statement of qualifications of key individuals who will execute the project including:
    1. Background working with nonprofit organizations / CDFIs and in persistent poverty communities;
    2. Experience conducing quantitative and qualitative research;
    3. Resume and / or C.V. of each member of the research team;
- Estimated budget (including fees and expenses);
- Samples (2) of similar, relevant work;
- References from two or three previous clients;

Strong consideration will be given to diverse research teams based in / with experience working in rural communities and regions of persistent poverty. The budget allocated to this project is $350,000.

Project Period: October 15, 2020 - October 30, 2021

Timing:
- *Proposals will be accepted beginning **September 1, 2020**,*

- *Closing date is **September 15, 2020**,*
- *Successful applicant will be notified **September 30, 2020**.*

Proposal Submission / Questions:

Proposals should be submitted as single .pdf documents via email by closed of business (5pm Eastern Time) on **September 15, 2020.** Fahe is an Equal Opportunity Employer. Please direct proposals or questions to Sara Ball, Director of Strategic Planning and Internal Systems (sball@fahe.org) with copy to Jose Quinonez, Director, Partners for Rural Transformation (jose@pfrt.org)