



Request for Proposals (RFP)

Measurement, Evaluation, and Learning Services

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Purpose and Objective

Invest in Our Future, a fiscally sponsored project of RF Catalytic Capital, Inc. (the Fund/IOF/we/our/us) solicits proposals for a Measurement, Evaluation, and Learning Consultant or firm to build an evaluation framework for measuring progress of existing grants and develop learning questions for the organization.

Overview

RFP Manager:	Luke Branscum
RFP Email:	lbranscum@investinourfuture.org
RFP Deadline:	January 24, 2024 5:00PM EST
Project Start/End Dates:	February 24 – May 23, 2025

About Invest in Our Future (IOF)

Invest in Our Future (IOF) is marshaling philanthropic resources in a national effort to build an inclusive, equitable clean energy economy. Over the last two years, the federal government has pursued a clean industrial strategy that is expected to catalyze \$1 trillion in public and private investments for clean energy manufacturing and deployment across the United States. These investments offer a unique opportunity to create high-quality, well-paying jobs for local residents, broaden access to clean energy for families and businesses, reduce air and water pollution, and build community resilience.

IOF launched as a pooled philanthropic fund to help communities across the country tap into this opportunity—by raising awareness of new programs and incentives, building capacity and providing technical assistance at the state and local level, accelerating new projects through complex approval processes, expanding America’s skilled clean energy workforce, and amplifying success stories.

The fund’s grantmaking focuses on place-based strategies to build enduring ecosystems of support that will facilitate the long-term work of effective, equitable implementation nationwide, prioritizing historically underserved communities. Strategic priorities for grantmaking include Forging and Expanding Project Pipelines, Addressing Siting and Permitting Barriers, and Building an Equitable and High-Quality Clean Energy Workforce.

At the same time, IOF also serves as a strategic hub for NGOs and funders working in the emerging space of climate and clean energy implementation. Leveraging connections to a broad funder network, IOF coordinates across philanthropy to identify gaps and direct funding to on-the-ground organizations that can fill those gaps.

Fiscal Sponsor: RF Catalytic Capital

Invest in Our Future is a fiscally sponsored project of RF Catalytic Capital, Inc. (“RFCC”). RFCC is a 501(c)(3) public charity, launched by the Rockefeller Foundation in 2020, whose work is to develop, support, and/or apply innovative solutions to address the world’s most intractable social and environmental problems impacting vulnerable people and communities.

Scope of Work

IOF seeks a Measurement, Evaluation, and Learning (MEL) Consultant or firm for a three part MEL strategy—to help the IOF team design and structure ongoing check in and evaluation of current grants, to analyze current grants to date including a report due by April 2025, and to develop learning questions for the organization. IOF has over eighty grantee partners and has begun collecting reports and learnings from our first few rounds of grantmaking. As the federal climate investments develop along with our work as a funder, IOF seeks to build out a strategy for consistent evaluation and learning across our portfolio to ensure continued impact towards our mission.

Our Approach

IOF seeks to build an approach to learning and evaluation that is focused on impact to our core constituencies, including communities at the heart of the clean energy transition. IOF expects that equity will be embedded throughout the process, including design, reporting, analysis, and shared learnings. We aim to align the evaluation process to the principles of the [Equitable Evaluation Framework](#). We also seek to build an approach that is immediately useful for IOF's decision making and to our network of funders aligned in this space with ongoing and actionable findings. We seek learnings that are shareable in a meaningful way.

IOF's MEL approach will be led by its program officers, who will be the primary points of contacts with our grantee partners. We may ask the consultant to engage with stakeholders including but not limited to our funders, our broader network of philanthropic organizations working alongside us, and specific grantees as directed by IOF staff.

Our Programmatic Work

IOF's singular focus on implementation of climate and clean energy programs allows us to identify gaps, opportunities, and effective organizations in this emerging space. We connect longstanding clean energy organizations with stakeholders new to climate to accelerate and scale partnerships. We drive coordination across sectors to test new models for accelerating equitable investment that can be scaled across hundreds of places.

In 2025, IOF will transition from the short-term sprint supporting the launch of federal programs, to medium- and long-term efforts needed to unlock the full potential of climate and clean energy investments and accelerate decarbonization nationwide. This coincides with a pivotal transition for the IRA, as the federal government passes the baton to state, local, and Tribal governments, community-based organizations, and the private sector to deploy investments at industrial, community, and household levels.

Our place-based investments—in regions, states, cities, counties, Tribal land, and local communities—will both increase capacity for development and build public demand for projects. And while the potential for industrial and utility-scale projects is drawing private sector resources, IOF is facilitating the community engagement necessary to navigate siting, permitting, and workforce needs, making projects more successful and supporting an equitable clean energy transition.

Our strategy centers on forging and accelerating equitable investment, removing barriers and bottlenecks holding existing projects back, while developing a high quality and equitable clean energy workforce. Embedded across these strategies, IOF will support targeted strategic communications and

mobilization capacity to continue building durable support for federal investments. Our strategic objectives are:

1. Forging and Expanding Project Pipelines
2. Addressing Siting and Permitting Barriers
3. Developing an Equitable Clean Energy Workforce

As we launch into this new phase of programmatic work, we seek to organize and develop the learnings from our early stages of grantmaking, focused on driving uptake and launching signature clean energy programs, supporting Tribal, state, and local governments, expanding the clean energy pipeline, and building public demand for decarbonization.

Evaluation Scope

IOF seeks a partner to refine existing processes and build new tools for ongoing learning and evaluation of our grantmaking. We seek a set of evaluation tools and criteria that provide dynamic feedback and learnings. We want to understand outcomes of our funding and identify considerations for further scaling of our grantees' impact. This evaluation will include three workstreams; one to refine our process for collecting data and feedback from our grantees through regular check ins and grant reports, one interim analysis of our grantmaking and programmatic work to date, and one to develop learning questions for IOF. We seek proposals that address the following areas of importance:

- Develops an approach with actionable results for real-time learning and evaluation
- Prioritizes equity and delivers a low-burden process for capturing grantee insights and reflections
- Acknowledges IOF's unique role as an intermediary that also provides strategic direction for a broad range of partners beyond our direct pool of funders
- Produces learning questions that drive meaningful opportunities for evaluation and insight of the full range of IOF's activities and serves IOF, its staff, and funders alike

Proposed Deliverables

Evaluation Tracking System

- Proposal of regular reporting systems based on grantee programs and goals
- Tools to manage and track ongoing evaluation, possibly including evaluation templates
- Recommendations on variables to track, which may include progress to date, on scope/on budget, progress towards deployment, et cetera

Analysis of Work to Date

- A complete evaluation plan and scope for reviewing progress to date
- Collaborative approach to analysis of work to date through interviews, review of grant reports, etc
- Report of evaluation findings (full report for Invest in Our Future and a short version for partners) by April 2025

Learning Questions

- Framework for developing learning questions through consultation with IOF staff and stakeholders
- Report on findings from stakeholder engagement to inform creation of learning questions
- Learning questions
- Worksheets and/or recommendations for ongoing use of learning questions in IOF's work

The RFP Process

In furtherance of its core commitment of Expanding Equity and Economic Opportunities, IOF actively seeks partnerships with a diverse set of suppliers of goods and services. This includes, but is not limited to, minority-owned businesses (MBEs) and women-owned businesses (WBEs), as well as veteran-owned, service-disabled veteran owned, and LGBTQ-owned businesses. This also may include socially and environmentally aware businesses, and businesses that make diversity, equity, and inclusion important components of their business models.

Accordingly, IOF seeks input from potential suppliers about their business ownership and their commitment to diversity, equity and inclusion. The information provided will assist IOF in choosing suppliers who maintain practices that align with IOF's diversity, equity, and inclusion policies and, at the same time, are best positioned to provide high quality, competitively priced goods and services.

A commitment to the mission of IOF is required. Prior work on climate, clean energy, and/or conservation is preferred but not required, as is specific awareness or knowledge of the federal climate investments we work towards implementing. Knowledge of and connections with major stakeholders in our mission space is preferred but not required.

Sustainability

IOF is committed to procuring sustainable, ethical and responsibly sourced materials, goods and services. We seek to partner with suppliers who maintain practices that align with these values and practices and, at the same time, are best positioned to provide high quality, competitively priced goods and services.

Accessibility

IOF is committed to ensuring that our RFP process is accessible, and we may be able to offer some adjustments to enable interested vendors to better participate in the process. For support during the RFP process, contact the listed RFP Manager.

Key RFP Activity Dates

Key Activity	Target Date*
Issue RFP	Friday, January 10, 2024
Intent to Bid and/or Vendor Questions due to RFP Manager via email at lbranscum@investinourfuture.org	Friday, January 17, 2025 by 5:00pm EST; additional questions may be answered thereafter as necessary
Response to Vendor Questions	Wednesday, January 22, 2025 by 5:00pm EST, then rolling basis
Proposals due to RFP Manager via email at lbranscum@investinourfuture.org	January 27, 2025 by 5:00pm EST <i>Please inquire regarding late submissions.</i>
Evaluation of Proposals	January 28-January 31, 2025
Selection of finalists and proposal presentations, if needed	February 3-7, 2025
Selection Announcement	No later than February 28, 2025

*dates are subject to change, vendors will be notified of any changes

The Proposal

All proposals must include the following:

1. Cover Letter Summary of Company Background, key project personal, cost and expectations, etc.
2. Company Background Please provide a brief description of your company including its office size, history, resources, types of services customarily provided, location(s) and portfolio size.
3. Attributes and Approach A narrative that addresses how the Scope of Work, as outlined above, will be accomplished, including a timeline with benchmarks and the number of hours required to accomplish the work (hours per week and how flexible your availability is).
4. Experience Experience and qualifications of the consultant and include the resume of the principal individual(s) providing direct service.
5. Pricing Overview Project budget inclusive of fees and reimbursable expenses payable by IOF must be clearly defined.
6. Subcontracting The proposal and budget must identify any subcontracted services and identify the subcontractor by name.
7. Vendor References Please provide a minimum of three references from projects with similar scopes and budgets.
8. Other Information Please provide any additional information that you think supports your firm's credentials and qualifications.

All proposals should be submitted electronically in PDF form to Luke Branscum, Director of Strategic Initiatives and Operations, at lbranscum@investinourfuture.org.

Terms and Conditions

Reservation of Rights

IOF reserves the right to reject any or all proposals submitted if it is deemed to be in the best interest of IOF.

All proposals and supporting documentation shall become the property of IOF, subject to claims of confidentiality in respect of the proposal and supporting documentation.

IOF reserves the right to check the accuracy of all information and to request official supporting documents. Applicants who provide inaccurate information can always be excluded from the RFP process.

Confidentiality

IOF reserves the right to require any respondent to enter into a non-disclosure agreement.

Costs and Ownership

The RFP does not obligate IOF to pay for any costs of any kind that may be incurred by the applicant or any third parties, in connection with your response. All responses and supporting documentation shall become the property of IOF, subject to claims of confidentiality and copyright, in respect of the response and supporting documentation.

Intellectual Property

Applicants should not use any intellectual property of IOF, RFCC and The Rockefeller Foundation including, but not limited to, all logos, registered trademarks, or trade names of IOF, at any time without the prior written approval of IOF, as appropriate.

Responses

All accepted responses shall become the property of IOF and will not be returned.

Governing Law

This RFP and your response to it shall be governed by the laws of the State of New York.

No Liability

IOF shall not be liable to any respondent, person, or entity for any losses, expenses, costs, claims, or damages of any kind:

- Arising out of, by reason of, or attributable to, prospective vendors responding to this RFP; or
- As a result of the use of any information, error, or omission contained in this RFP document or provided during the RFP process.

IOF assumes no obligation, no responsibility and no liability for costs incurred by vendors responding to this RFP prior to the issuance of a contract.

Privacy

Personal information collected from any respondent is subject to the following privacy policy, available at <https://www.rockefellerfoundation.org/privacy-policy/> and will be used by IOF in accordance with



this privacy policy. For international respondents, please be aware that the information submitted is collected in the United States of America. In addition to being subject to the privacy policy, the collection, storage, and use of a respondent's personal data will be subject to U.S. laws and regulations, which may be different from the laws and regulations of other countries. By participating in this RFP, the respondent consents to this collection, storage, and use.

Entire RFP

This RFP, any addenda to it, and any attached schedules, constitute the entire RFP. If it becomes necessary to revise any part of this RFP, IOF will contact all participants.