

December 15, 2023

REQUEST FOR PROPOSAL

Hamilton Community Foundation is requesting a brief proposal to assist us with a project to design and implement an outcome evaluation of HCF's Participatory Granting pilot project. Submission date is January 13, 2024.

Background

Hamilton Community Foundation was established in 1954 as Ontario's first community foundation. Today, it is a member of over 191 community foundations across Canada and a rapidly expanding international network. In a nutshell, community foundations have three roles:

- Working with donors to build funds that support local charities.
- Giving grants across all sectors of the community: arts and culture, education, recreation, health and human services and the environment.
- Community leadership – bringing people together to address issues and opportunities facing their communities.

HCF is driven by its:

- Vision: A vibrant, diverse and inclusive Hamilton, and
- Mission: To drive positive change by connecting diverse people, ideas and resources.

The Participatory Granting Pilot project

In January 2024, HCF will begin delivery of a Participatory Granting pilot project. Participatory Granting is a trust-based, community-engaged approach to granting that shifts decision-making power to those most affected by the grants.

The project design, informed by research, community consultation and community co-design, will bring together equity-deserving community (EDC) members and organizations to take the lead in identifying funding priorities and allocating funding. The project will test a hybrid Community Panel and Closed Collective participatory granting model. Please see the attached Fact Sheet for a description of the model and draft project timeline.

The Participatory Granting Pilot is part of HCF's broader work of engaging in trust-based philanthropy towards increasing the capacity and health of equity-deserving organizations and communities to address systemic barriers.

Scope of work

For this project, HCF seeks highly skilled support for HCF staff, the Project Facilitator and participants to develop and implement an evaluation that examines the relevance, effectiveness and impact of the Participatory Granting pilot.

The scope of the work includes:

- Refining the project's theory of change and developing, in consultation with staff and pilot participants, indicators to measure project progress and impact
- Creating an evaluation framework to assess the process and outcomes of the Participatory Granting pilot
- Developing and administering evaluation tools, with a strong focus on qualitative data
- Supporting grantees to identify and collect relevant data related to the impact of their participation in the participatory granting process and of the funding received through this process
- Collecting, cleaning and analyzing qualitative and quantitative data to answer research questions
- Meeting with HCF as needed to guide and implement the evaluation, minimum every two weeks, unless otherwise agreed
- Producing a written report and summary slide deck of key findings

To provide context to the work, HCF staff will advise the successful consultant on existing reporting and evaluation mechanisms, and facilitate connections between the consultant, the project's third-party facilitator and participating organizations and individuals.

Outputs for the full three-year project should include two mid-project reports (years 1 and 2) and a final project report within two months of the pilot's completion, expected to be April 30, 2026.

This is a three-year project, and we are anticipating working with the selected consultant for the full duration. A one-year contract will be awarded to the successful consultant. The contract will be reviewed annually and, if both parties agree, renewed annually for the duration of the project.

HCF's average rate of compensation for evaluation activities is \$900.00 per day. Proposals must include a cost-per-year in line with this rate and the scope of activities for each year.

Experience and qualifications

The successful consultant will have an in-depth knowledge of program evaluation, qualitative research and community-engaged research approaches. Experience working with community groups and equity-

deserving communities is essential; experience working with local (Hamilton) groups is considered an asset.

Proposal content

If your firm is interested in bidding on this work, please provide a proposal to Elizabeth Webb, Grants Coordinator, at e.webb@hamiltoncommunityfoundation.ca

The proposal must include the following:

- Your understanding of the initiative and the scope of work to be accomplished.
- Brief bios of team members who would be involved in the work, and the roles they would play
- Examples of your work that demonstrate your experience in conducting similar projects; in particular we are interested in work conducted with non-profits/charities.
- Project plan and critical path/timeline. It is anticipated the work would commence sometime in February 2024, with the first project year completed March 31, 2025, and the full pilot project completed in April of 2026. Project plans should include a breakdown of tasks and timelines (e.g. number of days)
- Your expectations from the HCF team through each phase of work outlined in the project plan
- Deliverables. We expect that at a minimum this would include:
 - Research plan
 - Bi-weekly meetings with staff to share updates and guide the evaluation (may be more frequent as needed)
 - Written updates via email
 - Final report for year 1 including, at a minimum, executive summary, methods, and findings
 - Summary slide deck of key findings
- Fee proposal for each year of the three-year project, plus hourly and per diem rates for any additional services
- The names and contact information for two organizations for whom you have completed similar work in the past five years that we may contact.

Evaluation

Proposals will be evaluated on:

- The consultant(s) understanding of the Participatory Granting Pilot and its goals
- The proposed approach to achieving the goals of the project
- Past performance – demonstrated expertise in providing similar projects, in particular working as a collaborative partner and resource to staff in completing the work, plus references.
- Fees

Short-listed firms may have an opportunity to expand on their proposal via zoom. This will consist of a 30-minute zoom meeting to ask and answer questions about the proposal.

Process

<i>Task</i>	<i>Date</i>
Submission deadline	12 pm, January 13, 2024
Shortlisted candidates meet with staff	Week of January 15, 2024
Successful candidate informed	January 23, 2024
Contract begins	February 1, 2024 (subject to change as needed)

RFP Terms

1. The proponent firm shall bear all costs associated with responding to this RFP.
2. HCF is not bound to explain its decision regarding submitted proposal.
3. By accepting a proposal, HCF does not intend to bind itself legally in any way.

HCF intends solely to begin negotiating a contract on the subject matter of the proposal. Unless HCF states otherwise in writing at the time, oral or written communications between the firm and HCF on the subject matter of the proposal are always to be considered as subject to the execution of a formal written agreement. In addition, the execution of this contract in no way binds HCF to an ongoing relationship with the vendor. This contract should be considered as a standalone.

4. Prior to the closing date of this RFP, respondents should not establish contact with anyone (staff or board) inside the organization regarding this RFP, other than the representative identified. Failure to abide by this requirement could be grounds for rejection of your proposal.

Background materials

A fact sheet is attached; our website is hamiltoncommunityfoundation.ca; Twitter: @HamCommFdn, Facebook: @HamCommFdn. A copy of our annual report is available [here](#).

HCF contact

Please direct all questions to:

Elizabeth Webb, Grants Co-ordinator

Phone: 905-523-5600 x 249

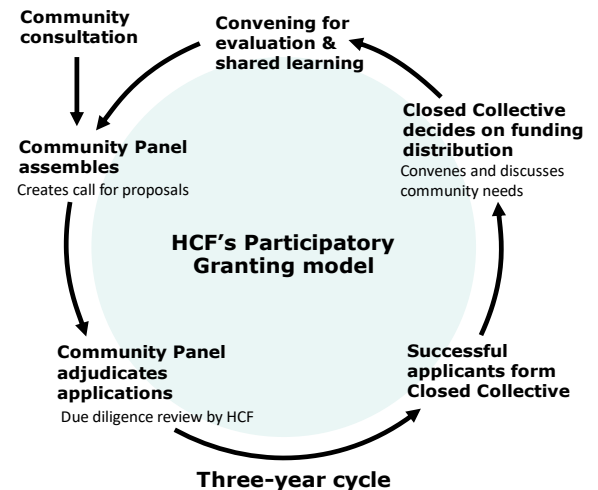
Email: e.webb@hamiltoncommunityfoundation.ca

Hamilton Community Foundation, Participatory Granting Pilot Fact Sheet

HCF is launching a three-year project to pilot participatory granting in Hamilton. The project will engage equity-deserving community (EDC) organizations in a participatory process to distribute HCF funding. Funding will be directed to EDC-led organizations with budgets less than \$1 million, to support capacity building.

The project model:

The project will use a hybrid model, which combines the Community Panel and Closed Collective models of participatory granting¹. The Community Panel will design the call for proposals and application (working within parameters already established through community consultation) and adjudicate applications. The Community Panel will then select 8-10 organizations who will form a Closed Collective. The Closed Collective will then meet and decide together, through a facilitated process, how to distribute the funding (approximately \$500,000) among Collective member organizations.



Anticipated Project Timeline, Year 1:

January 2024	Community Panel assemblies, develops call for proposals. Call for proposals opens. Community Panel designs adjudication and decision-making process.
February 2024	Call for proposals closes. Community Panel reviews and makes decisions.
March 2024	Closed Collective assembles, makes funding decisions over three facilitated meetings.
April 2024	Funding is disbursed. Convening of Community Panel and Closed Collective for shared learning.
November 2024	Convening of Community Panel and Closed Collective for shared learning.

For more information, please contact: Elizabeth Webb, Grants Coordinator, 905-523-5600 x249
e.webb@hamiltoncommunityfoundation.ca

¹ Additional information on participatory granting models can be found here:
https://participatorygrantmaking.issuelab.org/?publisher=&wikitopic_categories=&keywords=&pubdate_start_year=1&pubdate_end_year=1&sort=&categories=&offset=0&pageSize=12