

Request for Proposals

Developmental Evaluation of Laudes Foundation's Strategy (2021-2025)

Laudes Foundation is commissioning a developmental evaluation of its five-year strategy. More details about the objectives, scope and consultant requirements are outlined below. **Complete proposals must be submitted by 15 December 2021.**

I. Introduction

Laudes Foundation (hereafter 'the foundation') is an independent foundation and part of the Brenninkmeijer family enterprise. Launched in 2020 to address the climate and inequality crises working with and through the finance, fashion and built environment industries. The foundation builds on the six generations of entrepreneurship and philanthropy and stands next to the COFRA businesses and the family's other private philanthropic activities, including Porticus, Good Energies, and Argidius Foundations.

The foundation is commissioning a developmental evaluation (hereafter 'the evaluation') to provide regular actionable and critical feedback and learning about the effectiveness of its strategy¹. Learning will feed into the foundation annual adaptation cycle. The evaluation will cover the full duration² of the Laudes Foundation strategy (which started in January 2021) through till December 2025.

The request for proposals presents a brief description of Laudes Foundation's strategy and our work; the purpose, objectives and scope; guiding questions; methodology; roles and responsibilities; developmental evaluation process; stakeholder engagement; consultant requirements and level of effort.

II. Laudes Foundation Strategy

The foundation is responding to the convergence of two global crises – inequality and climate breakdown, resulting from current global economic disfunction.

The foundation's vision is to contribute to an economic system –

“Where global markets value all people and respect nature.”

The mission is to support brave action to inspire and challenge industry to harness its power for good.

The foundation primary mode of operating is to intervene and change industry behaviour working with and across four groups of actors; policymakers; financial actors; business; and workers, producers and communities – within the context of three programmes focused on industries: (a) finance and capital markets (4 interventions); (b) fashion (labour rights and materials) (6 interventions); and (c) built environment (4 interventions).

In doing so the foundation strategy identifies several approaches to intervene in the system from accelerating advocacy to reimagining the economic system *inter alia* (see ToC)³ The

¹ See: <https://www.laudesfoundation.org/what-we-do/our-strategy>

² Beginning with a retrospective assessment of 2021 and then real-time assessment from 2022 onwards.

³ <https://toc.laudesfoundation.org/>

approaches aim to contribute to delivering 2025 outcomes ('half-time results') and 2030 impacts for the four groups of actors:

2030 Impact ("The Reality We Want to See By 2030")	2025 Outcome A (Climate) ("How Each Actor Helps Create This Reality")	2025 Outcome B (Equality) ("How Each Actor Helps Create This Reality")
1. Bold policy and regulatory frameworks have created the foundation for a new economy grounded in climate-positive practices, inclusion and equality.	1a. Policy-makers reform, implement, enforce and protect critical laws and policies that require climate-positive practices.	1b. Policy-makers reform, implement, enforce and protect critical laws and policies that require equity and inclusion.
2. An accountable financial sector that enables, conditions and rewards climate-positive practices, inclusion and equality.	2a. Financial sector actors use their influence, policies, practices and valuation methodologies towards ensuring climate-positive practices.	2b. Financial sector actors use their influence, policies, practices and valuation methodologies towards ensuring equity and inclusion.
3. Responsible businesses and industries are climate-positive and ensure inclusion and equality for workers, producers and communities.	3a. Businesses promote and implement bold, climate-positive policies, models and practices.	3b. Businesses promote and implement bold policies, models and practices that contribute to equity and inclusion.
4. Active, organised workers, producers and communities exercise power to secure climate-positive practices, inclusion and equality.	4a. Workers, producers, and communities claim rights and build power to organise and advocate for climate-positive policies and practices.	4b. Workers, producers and communities claim rights and build power to organise and advocate for equity and inclusion.

III. Purpose, Objectives & Scope

The main purpose of the evaluation will be to:

To provide ongoing assessment and learning to Laudes Foundation on the effectiveness of its strategy and progress towards 2025 outcomes.

The **key objectives** of the developmental evaluation will be to:

1. To facilitate intentional learning through on-going assessment of the effectiveness of the foundation strategy that informs decision-making and strategic adaptation. In doing so, the evaluation will play a key role helping the foundation to iterate and learn to ensure the strategy remains relevant and maximises effectiveness.
2. To assess and test the foundation theory of change (TOC) and help identify any changes to the TOC as the strategy is implemented including uncovering unexpected casual-pathways and results.

3. To identify which approaches⁴ in the strategy work well and those that do not work well and require adaptation.

The **scope** of the developmental evaluation is the full duration of the foundation strategic period from 2021-2025. The evaluation will cover foundation grant-making made during 2021 through an initial retrospective assessment to be completed in 2022.

IV. Guiding Questions

The evaluation is to be guided by the foundation *Learning Agenda*. In addition, the evaluation is also expected to identify further questions at the inception stage and during ongoing work with the participation and in consultation with foundation staff.

Key mission and strategy level questions are provided below.

- How effective is the foundation in moving the four actors across its strategy towards the 2025 outcomes?
 - How well are the approaches driving finance, fashion and built environment industries towards mitigating climate change and reducing inequality?
- How well is the foundation set up to deliver against its mission?
- How well is the foundation influencing the field of philanthropic funding around the issues of climate change and inequality?

V. Methodology

Design and Method: The evaluation design and methods will be dynamic, appropriate and complementary for the context within which the foundation operates and the existing measurement and learning framework which uses evaluative rubrics⁵. Therefore, the foundation encourages methodological flexibility and use of mixed method data collection techniques alongside the use of agile and adaptive approaches to conduct the evaluation. The evaluation inception period will be expected to set-out the design and methods in detail. In addition, to collecting primary data when needed, the evaluation will draw information and provided by the foundation to prevent a duplication of efforts and to minimise burden on staff, partners and stakeholders and to ensure the design is fit for purpose and utility-focused.

Documentary Review and Evidence: The evaluation will have access to strategy documents, learning agenda, systems map, systems baseline report⁶, financial and budgetary data, partner learning reports, after action reviews, external initiative and cluster evaluation reports, research studies, partner perception reports⁷, evidence map as needed.

Rating system: The evaluation will use the rubric rating system to facilitate assessment of the foundation's contribution to 2025 outcomes while generating lessons for adaptation and learning. The evaluation will work with the programmatic teams to co-sense rubric ratings through appropriate synthesis of evidence during each year.⁸

⁴ Accelerating advocacy; strengthening accountability; scaling research and innovation; cultivating alliances; amplifying narratives and redefining value.

⁵ <https://www.laudesfoundation.org/grants/rubrics>

⁶ To be published in December 2021 – systems baseline report can be made available to potential bidders prior to publication.

⁷ Produced by CEP in Q12023

⁸ Typically, sensemaking of B&C rubrics will take place in Q2 of each year.

VI. Roles and Responsibilities

The roles and responsibilities for the evaluation are as follows:

Director of Effective Philanthropy / Senior Evaluation Manager (joint-Task Managers) are responsible for:

- Coordination of the selection of the evaluation team;
- Overall responsibility and accountability for management and delivery of the evaluation against annual work-plans;
- Facilitation of the evaluation team access to foundation and other relevant data, all documents, and access to stakeholders/actors (internal and external) as appropriate;
- Coordination between the evaluation team and foundation programme teams;
- Technical guidance for the evaluation through inception and implementation; and
- Support adaptative management based on learning emerging.

Programme Directors are responsible for:

- Ensuring the evaluation team has full access to the programme staff, partners and where necessary facilitate access to other funders and stakeholders to carry out and support evaluative learning. This is critical for accurate, candid and relevant feedback that can be utilised by the foundation;
- Participation in key developmental evaluation related meetings (kick off; inception; learning and sense-making meetings; informal and formal meeting as requested);
- Support adaptative management based on learning emerging; and
- Reviewing and commenting on drafts of the learning reports.

The Evaluation Team are responsible for:

- Appropriate overall design and implementation of the evaluation, ensuring use and utility to the foundation;
- Facilitation of kick-off / inception workshop(s) for the foundation, which will conceptualise and develop the evaluation design and approach that is appropriate for assessment, co-sensing and learning;
- Developing annual work-plans for the evaluation including an agreed set of deliverables;
- Collect and conduct analyses of data (qualitative and quantitative) – primary and secondary;
- Develop, facilitate and present analyses in engaging and digestible ways to foundation staff. Being responsible for selection of appropriate communication channels (a) written (e.g., short learning reports); (b) interactive (e.g., workshops / sense-making with foundation staff) and verbal means (e.g., audio podcasts / data-visualisation briefs) in person and virtually;
- Regular formal and informal reporting to Effective Philanthropy and Programme Directors on progress that informs timely strategic and operational decision-making;
- Day-to-day management of the developmental evaluation;
- Provide quality assurance of all deliverables.

The evaluation team will report to the Director of Effective Philanthropy on all issues related to the evaluation – contracts, fees and expenses, and deliverables and commenting / response processes.

VII. Principles of Engagement

The principles of engagement are intended to guide the behaviour of the evaluation team as they engage with the foundation and other stakeholders.

Working with the foundation and its partners

- Create a trusting and open relationship informed by mutual respect where the candid exchange of viewpoints on evidence is established and maintained, and where success and failure are treated with equal curiosity;
- Demonstrate often how the measurement, learning and evaluation process can “improve” and add value to the foundation and its partners;
- Balance the focus on prove (e.g. assessing outcomes and contribution to early/late changes in the ToC) and improve (e.g. adapting interventions / approaches), as well as knowledge (e.g. identifying and sharing lessons).
- Sharing info and ideas in an inclusive, engaging, succinct and accessible manner;
- Regular meeting schedule, balancing online and in-person; formal and informal;
- Use technology, as needed, to enhance efficiency, accuracy and privacy;

Utilising a Gender, Social Equity and Inclusive (GESI) Approach

- Overlay a GESI lens to the entire process;
- Recognise that the implementation will vary by intervention, approach, partner context and geography;
- Describe any limitations to the process, or adjustments over time.

VIII. Process

The evaluation team will be expected to deliver the following key products:

- Developmental evaluation inception report and work plan in Q1 2022; subsequent work plans will be submitted in Q1 of each year until Q1 2025 (final work plan).
- Initial and ‘lite’ retrospective review of 2021 (1st year of strategy implementation) by end of Q2 2022;
- Regular review and testing of the foundation Theory of Change as needed (ongoing);
- Two learning / evidence reports per year to feed into strategic adaptation processes (May thru July) and progress towards outcomes and lessons (Nov-Dec);
- Facilitate and/or participate in on-going adaptation processes, rubric-rating co-sensing with the foundation as requested.

Precise milestones will be developed with Effective Philanthropy and the foundation management team at the time of the inception report.

IX. Stakeholder Engagement

Stakeholder involvement is critical to the success of the evaluation. The evaluation team is expected to employ participatory and collaborative approaches for meaningful involvement of foundation staff and partners in the evaluation. The evaluation team should ensure sufficiently diverse perspectives and triangulation during engagement.

The learning reports and other evaluative evidence generated by the evaluation will be discussed in meetings with foundation management and staff to allow for co-sensing and to contribute to use and utility.

The primary users and audiences of the evaluation are:

- Governing bodies of the foundation
- Foundation Management Team
- Foundation staff
- Partners
- Co-funders

Learning products will be developed after the completion of the reports as appropriate and necessary by Effective Philanthropy and Communication teams. Products will be published by the foundation and disseminated through its website and social media as appropriate.

X. Consultant(s) Requirement and Level of Effort

The evaluation will be carried out from January 2022 until December 2025. The level of effort per quarter is expected to be approximately 30 – 40 days (120 – 160 working days per year). However, it is expected that in the first year of the evaluation (2022) the level of effort will be higher, taking into account the inception period and the need to complete a retrospective review of 2021.

Please submit the following to Lee Alexander Risby, Director of Effective Philanthropy (L.risby@laudesfoundation.org) and Ms. Savi Mull, Senior Evaluation Manager, Laudes Foundation (s.mull@laudesfoundation.org) by 15 December 2021.

Interested teams should submit clarifying questions as needed during the request for proposals period.

A. Technical Proposal

A narrative proposal (no more than 10 pages excluding annexes) including the following sections:

- a) Developmental Evaluation Outline Methodology: Describe your overall approach and methodology.
- b) Relevant Experience: Provide details of projects of similar scope, complexity and nature you have worked on previously. Please include any experience with developmental evaluation and real-time, utility-focused learning evaluations.
- c) Specific Expertise: Describe your level of knowledge and expertise in the context, practice, and interventions in built environment, materials, labour rights and financial and capital markets and experience in Europe, Asia and Brazil.
- d) Key Personnel and Staffing: Describe the key personnel. Include CVs (no more than 4 pages each and attached as annex) of key personnel who would be part of the proposed team.
- e) Timeline: Include a detailed timeline of key activities in 2022 and an outline for 2023 thru 2025.
- f) Sample reports: Two sample evaluation reports (ideally developmental evaluation-based/real-time assessment/learning based products) authored by the team lead (will be treated as confidential and used for purposes of selection only).
- g) References: Provide two references who can give insights into your relevant previous experience.

B. Financial proposal

The financial proposal should include a line-item budget and a budget narrative for 2022 only (initial contract will be for 1 year (renewable)). Subsequent years for the evaluation will be based on annual work-plan. The expected level of effort for the evaluation should be aligned and justified based on the proposed approach. The cost estimates used to prepare the budget should be presented in Euro.

C. Consultant Requirements

Applicants will be a group of consultants with a designated team lead, or consulting companies with relevant expertise in conducting developmental / real-time evaluation with a strong understanding of philanthropy. It is also essential that they have subject matter expertise in built environment, fashion (with particular reference to labour rights and sustainable materials) and finance and capital market transformation.

Consulting teams must have the following qualifications and mix of experience / skills:

Evaluation Experience and Skills:

- Demonstrated technical experience in evaluation design and implementation in complex and changing contexts.
 - Experience in designing and leading developmental or real-time evaluations;
 - Strong qualitative and quantitative analytical and synthesis skills;
 - Familiarity with the use of rubric-based measurement and evaluative approaches; and
 - Experience in incorporating and using a gender, equity and social inclusion lens in evaluations.
 - Ability to organise and communicate complex evidence from multiple sources in succinct and engaging learning briefs, so that findings inform decision-makers and decision-making;

Technical Experience:

- Proven knowledge and understanding of the climate and inequality challenges across the finance, fashion and building industries;
- Familiarity with the philanthropic field, grant-making mechanisms, and philanthropic partnerships.

Non-Technical Experience (ways of working):

- Excellent facilitation in virtual and in-person settings, active-listening and communication skills related to programmatic and organisational learning;
- High emotional intelligence required to set and manage expectations around roles and outcomes;
- Ability to build trust and engagement among diverse groups of stakeholders inside and outside the foundation, in order to plan and implement developmental evaluation activities.
- Fluency in English (spoken and written) is essential