



REQUEST FOR PROPOSALS (RFP)

Building a Strategic Learning and Evaluation System for the American Indian College Fund

RFP #0001 Part 1 and Part 2, Issue Date: January 11, 2022

This project is grounded in Indigenous culture and identity. We want to recognize several key concepts - learning and relationships - that are central to this work in Native languages to help us walk together in a good way as we do this work.

Íhoo' aah (Navajo) - To learn or gain knowledge

Mitakuye Oyasin (Lakota) - All my relatives; to be in relationship with all things.

Woksape (Lakota) - Wisdom, knowledge, and experience

Unspe (Lakota) - To learn

Nanda-gikendan (Ojibwe) - To learn

Kkendaswen (Potawatami) - The process of learning

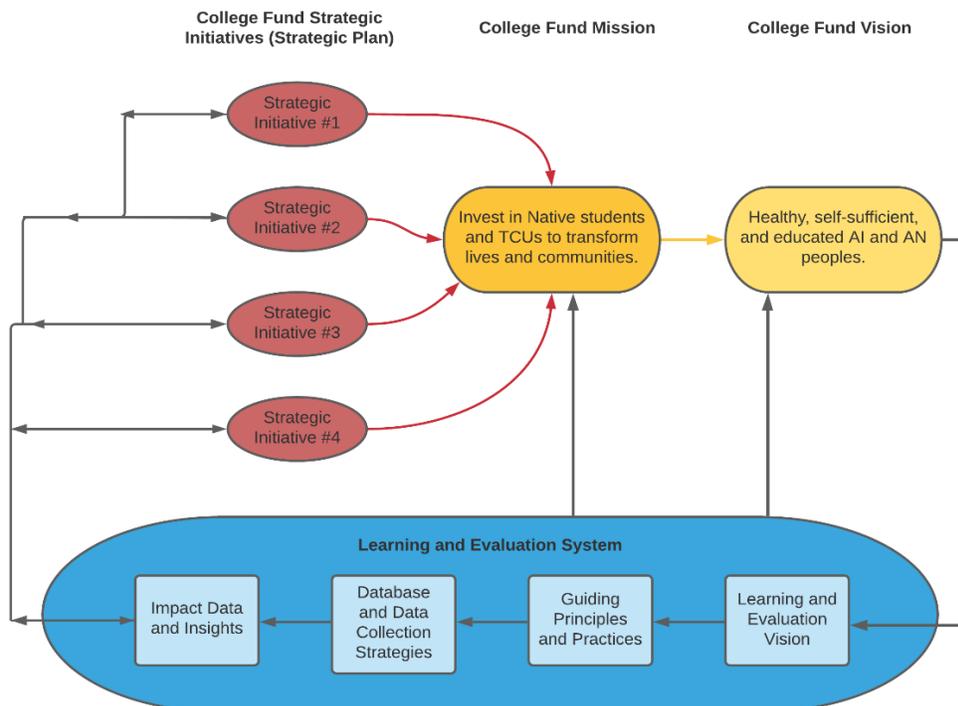
I. Project Overview

Founded in 1989, the American Indian College Fund (the College Fund) is a national non-profit organizational that invests in Native students and tribal college education to transform lives and communities. The College Fund focuses on developing and delivering programming to strengthen the institutional capacities of the thirty-five accredited tribal colleges and universities in the United States. It also provides over 5,000 scholarships annually and holistic student supports to help Native students access and thrive in college and move into meaningful employment. The College Fund practices strategic and adaptive philanthropy that is evidence driven. As part of its focus on strategic philanthropy, the College Fund views scholarly research and actionable insights as central to its mission and organizational learning. Through its Office of Research and Evaluation, the American Indian College Fund conducts impact evaluation and leads important research about Native American experiences in higher education to guide, inform, and improve the organization's approaches to its work. These insights aid the College Fund in learning and designing equitable and culturally responsive programs and strategies that more effectively support Native

students and tribal colleges. These insights are also critical for the College Fund’s relationships and accountabilities to its partners, donors, funders, and Board.

While the College Fund has a strong and established commitment to evaluation and strategic learning within the organization, it has not yet developed a shared vision and purpose for this work or articulated shared principles and practices to guide its implementation. These are critical building blocks to becoming a learning organization with a thoughtful vision, plan, and supportive tools to guide our learning and evaluation (a learning system), which will position us as a leader in Native philanthropy. We need to have an open and constructive discussion about the assumptions, needs, and expectations that different College Fund staff, leaders, and partners hold for this area of our work so that we can establish a shared vision and shared set of principles and practices to guide our approach. This work should foreground Indigenous perspectives and methodologies to create a learning and evaluation system to uniquely serve the needs of the College Fund as a Native-led and Native-serving non-profit organization. Western methodologies should also be considered as a resource and drawn upon, where needed, to support the College Fund’s response to contemporary learning and evaluation environments in the non-profit sector.

Figure 1. The Vision for the College Fund’s Strategic Learning System



Ultimately, the proposed project will help the College Fund become a more focused and intentional Native-led and Native-serving learning organization that collectively values learning and measuring impact, has a shared vision and understanding in this space, and has the capacity to gather insights, learn with the Native people we serve, and integrate these insights into our programming to transform lives and Native communities.

II. Glossary of Key Terms

Evaluation - the systematic collection, analysis, and sharing of information with our staff, partners, and leaders to understand the effectiveness of our strategies and programs; and the application of those insights to improve the College Fund’s work with Native communities.

Learning and Evaluation Vision - a big picture statement and an illustrative figure that succinctly describe why the College Fund is committed to learning and evaluation as an organization. Our L&E vision will be grounded in shared values and will establish common ground around how evaluation and learning help us to fulfill our mission.

Learning and Evaluation Principles and Practices - a set of agreed upon approaches that translate our vision and shared values into evaluation and learning practices that support who we are as a Native-led and Native-serving organization and establish shared expectations for how we will do this work at the College Fund. The First Nations Development Institute has developed a model research policy that recognize Indigenous data sovereignty and the need for research and evaluation to be culturally appropriate and beneficial to Native peoples and communities.¹

Strategic Learning - The College Fund embraces the definition of strategic learning offered by Coffman and Beer (2011, p. 1): “strategic learning integrates information from a wide variety of [data] gathering activities, including evaluation, into decisions about strategy. Although evaluators have a key role to play, so do programmatic staff and leaders who determine when and how strategy is planned, executed, and adjusted.”² The College Fund views strategic learning as essential to practicing strategic philanthropy and to being a high-impact and intentional learning organization.

¹ First Nations Development Institute. 2015. Research Policy. Available online: https://www.firstnations.org/wp-content/uploads/2019/04/First_Nations_Research_Policy_2016.pdf

² Coffman, Julia and Tanya Beer. 2011. Evaluation to Support Strategic Learning: Principles and Practices. Washington, D.C.: Center for Evaluation Innovation. Available online: http://www.pointk.org/resources/files/strategic_learning_coffman_beer.pdf

Strategic Learning and Evaluation System (SLES) - A strategic learning and evaluation system builds and brings together all of the components that are needed to advance organizational learning for philanthropic effectiveness: it anchors learning and evaluation in the College Fund’s mission and values through a shared vision; it builds the capacity, culture, and processes for staff learning; and it creates a knowledge system and supportive strategies - centered on the College Fund’s newly updated databases and its strategic plan - that clearly delineate how, when, and to what level insights will be gathered, analyzed, and applied to our work; what indicators will be tracked; and how data will be shared. This definition is based on FSG’s SLES framework developed by Preskill and Mack (2013) and key concepts described by Grantmakers for Effective Organizations (2019).³

III. Need for Consultant Services

The College Fund seeks up to two consultants with experience building successful learning and evaluation systems, and sound understandings of culturally responsive evaluation and learning in Native contexts, to help us build a shared framework, facilitate our discussions, setup our knowledge system, and make this work more seamless. This project is divided into two parts, which encompass different phases of work. Interested firms and individuals can propose on one or both parts.

Part 1 (RFP 0001 - Part 1, Project Phases 1 and 2)

The College Fund is soliciting responses from qualified Indigenous-led firms and Indigenous individuals to help the College Fund develop its learning and evaluation vision and translate that vision into a set of actionable principles and practices to guide its work in this space. The consultant selected for Part 1 will lead phase 1 (the development of a learning and evaluation vision) and phase 2 (the development of learning and evaluation principles and practices) for the project and advise on phase 3 (learning and evaluation system design and implementation). **The College Fund has budgeted up to \$100,000 for this work.**

Part 2 (RFP 0001- Part 2, Project Phase 3)

The College Fund is also soliciting responses from qualified firms and individuals to help it design, train staff around, and implement a strategic learning and evaluation system (SLES). The consultant selected for Part 2 will lead

³ Preskill, Hallie and Katelyn Mack. 2013. Building a Strategic Learning and Evaluation System for Your Organization. San Francisco, CA: FSG. Available online: <https://www.fsg.org/publications/building-strategic-learning-and-evaluation-system-your-organization#download-area>

Grantmakers for Effective Organizations (GEO). 2019. Learning in Philanthropy Guidebook. Washington, D.C. Available online: <https://measureresults.issuelab.org/resources/34950/34950.pdf>



phase 3 of this project, the development of the College Fund’s learning and evaluation system. **The College Fund has budgeted up to \$200,000 for this work.**

All phases of work are detailed in *Section V. Scope of Services* of this RFP. The College Fund envisions selecting up to two consultants for this work. Interested firms and individuals can propose on one or both parts. Each firm or individual selected will work with the College Fund’s project lead, project manager, and staff advisory team to advance and complete this work in a timely manner and gather stakeholder insights.

IV. Timeline

The RFP process will proceed according to the following schedule. These dates are targets and may be subject to change.

Target Date	Description
January 11, 2022	RFP made available to consultants and posted on the College Fund’s website.
February 1, 2022	Responses are due to rgarvoille@collegefund.org by 5 p.m. Mountain time.
February 4, 2022	College Fund requests any supplemental information.
February 11, 2022	Deadline for vendors to provide additional information.
February 28, 2022	Finalists selected and notified for presentations.
March 7-11, 2022	Finalist presentations held.
March 16, 2022	Consultant(s) selected and notified
April 1, 2022	Part 1, Phase 1 Project Kick-Off (Learning and Evaluation Vision Development)
August 1, 2022	Part 1, Phase 2 Project Kick-Off (Principles and Practices)
November 7, 2022	Part 2, Phase 3 Project Kick-Off (Learning and Evaluation Knowledge System)

V. Scope of Services

This project is designed to achieve the following goal:

By the end of this project, the College Fund will be a leading Native-led, Native serving learning organization with a strong culturally rooted learning and evaluation vision, a clear set of principles and practices to guide this work, and a knowledge system that will support the equitable gathering of impact data on

its new strategic plan and strategic directions. This project will build on the College Fund's staff knowledge, areas of strategic focus, and existing tools and processes - such as the WizeHive database - so that the organization can more efficiently and effectively measure success, identify high impact practices, and enhance its programming to fulfill its mission. The College is accountable to its donors and funders, its Board, and the Native communities it serves in this space.

To meet this project goal, this project is comprised of three phases of work. An emphasis on staff and stakeholder engagement cuts across all project phases.

Evaluation and Learning Vision Development (Part 1, Project Phase 1)

An Indigenous evaluation consultant will guide the College Fund through a process to co-create an intentional evaluation and learning vision. This brief vision statement will articulate why the College Fund engages in strategic learning, how learning and evaluation insights are grounded in the organization's values, and what benefits these insights provide to the organization and its partners. The vision will also speak broadly to how the College Fund's evaluation approach reflects Indigenous worldviews and methodologies. The College Fund's learning and evaluation vision should align with its new strategic plan and its guiding principles.

The consultant will be responsible for facilitating project meetings, collecting staff and partner feedback for the vision, guiding the development of the vision statement and the design of a culturally appropriate figure for representing this work, and producing a final vision statement. The vision statement will allow the College Fund to establish common ground around how evaluation and learning help us to fulfill our mission.

Defining Evaluation and Learning Principles & Practices (Part 1, Project Phase 2)

The Indigenous evaluation consultant selected for Part 1 will translate the College Fund's evaluation vision and shared values into a set of clearly defined evaluation and learning practices that support who we are as a Native-led and Native-serving organization and establish shared expectations for how we will approach our learning and evaluation work. An example of a set of model principles and practices is the [First Nations Development Institute's research policy](#).

Learning and Evaluation Knowledge System (Part 2, Project Phase 3)

Building on the shared values and the “why” and “how” established in phases 1 and 2 of this project, the consultant selected for Phase 3 will help the College Fund build a learning and evaluation knowledge system connected to our strategic plan that allows us to systematically collect and analyze information about our impacts. This knowledge system will be built around a set of agreed upon key indicators linked to our strategic initiatives. It will help us understand what we should measure at an organizational and program-level scale, when we should collect those insights, who will assist with data collection, how those insights will be captured using our WizeHive database, and where we will apply those insights to foster reflection on organizational strategy and programming.

Staff and Partner Engagement (All Phases)

The proposed project will foreground College Fund staff and partner knowledge, perspectives, and resources to develop a learning and evaluation vision, principles and practices, and a learning system that supports the College Fund as a Native-led and Native-serving organization. Thus, this highly collaborative project will engage all staff at the College Fund and key College Fund partners for feedback and insights. Consultants will be expected to design stakeholder engagement processes (focus groups, surveys, participatory workshops) to gather insights from staff and partners that reflect their experiences with and thoughts on existing learning and evaluation work within the College Fund; their thoughts on the role and practice of learning at a Native-led non-profit organization like the College Fund; and their expectations for an effective learning system at the College Fund. College Fund staff will also be given the opportunity to review and provide feedback on the draft deliverables created through this project, so the consultant should allow for these feedback periods in their project timeline. This project should also help build staff capacity around strategic learning and evaluation.

VI. Milestones and Deliverables

The proposed project has three key deliverables and six milestones as detailed in the table below. Part 1 of the project entails leading, managing, and completing deliverables 1 and 2 and advising on deliverable 3. Part 2 of the project entails leading, managing, and completing deliverable 3.

Table 1. Key Deliverables and Milestones

Deliverable	Description	Expected Elements	Expected Milestones and Dates for Completion
#1: College Fund Learning and Evaluation Vision (Consultant 1 leads)	Written description of the learning and evaluation vision unique to the College Fund, which will be informed by staff feedback, and integrated into the College Fund’s strategic plan to demonstrate how we understand our role as a learning organization.	Learning and evaluation vision statement; learning and evaluation metaphor/figure; summary of core values and stakeholder feedback.	DRAFT: June 1, 2022 FINAL: July 1, 2022 *with the intent that this will be folded into final College Fund Strategic Plan, 2022-2026
#2: College Fund Learning and Evaluation Principles and Practices (Consultant 1 leads)	Statement of Guiding Principles and Practices based on the College Fund’s learning and evaluation vision, which will more concretely spell out how the organization will conduct evaluation and learning.	Clearly defined set of principles and practices with examples, summary of stakeholder feedback	DRAFT: October 3, 2022 FINAL: November 1, 2022
#3: A Strategic Learning and Evaluation System (SLES) tailored to the College Fund as a Native-led and Native-serving organization (Consultant 1 advises; Consultant 2 leads)	A comprehensive and culturally responsive strategic learning system and implementation plan, which builds on the College Fund’s strategic plan, and determines what to measure, when, why, by and with whom, and with what resources, and where to apply these insights to enhance learning and organizational decision-making. This work will directly align the College Fund’s learning and evaluation system with its strategic plan and support impact data collection using its WizeHive database.	Strategic learning and evaluation knowledge system, implementation plan and strategies, staff training modules, and database alignments	April 3, 2023: Final SLES system is designed, training modules and database integrations are complete, and an implementation plan is finalized. June 19, 2023: Staff training complete; hand-off to College Fund for SLES implementation

VII. Vendor Eligibility

To be eligible to participate in this process, a vendor must meet the following criteria:

- Vendors will pay all appropriate taxes and social security contributions

- Vendors must be legally capable of entering into a contract
- Vendors should not have any conflict of interest
- Vendors are not the subject of any legal proceedings for bankruptcy or insolvency

VIII. Vendor Selection Criteria

All proposals will be evaluated based on the following criteria:

1. Demonstrated knowledge of project requirements as detailed under PART V: *Scope of Services* and a strong project plan detailing how a vendor will meet the described and desired project tasks and approaches listed there. The project plan should clearly state the processes, methods, and philosophies the vendor will use and demonstrate how the vendor will be culturally responsive.
2. A clear and detailed project schedule outlining the key steps in the development of each project phase and dates for their completion. The project schedule should include the milestones and deliverables described in *PART VI: Milestones and Deliverables*.
3. Demonstrated experience successfully developing similar high-level learning and evaluation systems and strategies.
4. Demonstrated experience translating findings, ideas, and insights into culturally responsive metaphors and visuals. This is a skill critical to helping us develop a visual to represent the College Fund's unique learning and evaluation vision.
5. Favorable client references, including references from BIPOC organizations.
6. Experience engaging and gathering feedback from BIPOC communities and stakeholders.
7. Demonstrated understanding of culturally relevant and responsive learning and evaluation practices.
8. Excellent facilitation skills and experience.
9. Demonstrated experience working with Native organizations.
10. Project costs and overall value.

IX. Instructions for Proposal Submission

The College Fund will review all proposals submitted by the deadline. If a firm or individual is invited to make a presentation to the College Fund, the costs for such a presentation will be the responsibility of the firm. The College Fund plans to select all vendors within 30 business days after the submission deadline and reserves the right not to select any firm if conditions change between the time of the RFP release and completion of the review process. No contractual obligation on behalf of the College



Fund whatsoever shall arise from the RFP process. Additionally, this RFP does not commit the College Fund to pay any cost incurred in the preparation or submission of any response to the RFP.

If your organization would like to respond to this RFP, please email your RFP response to Rebecca Garvoille at rgarvoille@collegefund.org with a subject line of "SLES RFP0001-Part 1 and/or SLES RFP 0001-Part 2. Please include the following in your response:

1. Proposer Information and References

- a. Provide primary contact information, including name of organization, phone number, email, and main point of contact.
- b. Provide a description of your firm and the names and qualifications of the project team members who will assist with this project. Please include the descriptions of any proposed subcontractors, if applicable.
- c. Provide a list of two to three professional references that the College Fund can contact. Include the following information for each reference: the name of the client; the value of the contract; the duration and year(s) of the contract; a summary of the work provided; a main point of contact, phone number, and email address for the client.
- d. Specify three of the following one-hour timeslots between March 7 and March 11, 2022 that would work for you to provide a presentation, if selected as a finalist.
 - i. Monday, March 7 at 10 a.m. Mountain
 - ii. Monday, March 7 at 2 p.m. Mountain
 - iii. Tuesday, March 8 at 11:30 a.m. Mountain
 - iv. Tuesday, March 8 at 3 p.m. Mountain
 - v. Wednesday, March 9 at 1 p.m. Mountain
 - vi. Wednesday, March 9 at 3 p.m. Mountain
 - vii. Thursday, March 10 at 9 a.m. Mountain
 - viii. Thursday, March 10 at 11 a.m. Mountain
 - ix. Friday, March 11 at 9 a.m. Mountain
 - x. Friday, March 11 at 11 a.m. Mountain

2. Qualifications and Response to Scope of Services

Please detail the firm's qualifications to perform the services outlined in *PART V: Scope of Services*. Additionally, respond on how your firm will perform the duties outlined in *PART V: Scope of Services*. Include at least two examples of final reports or presentations completed for similar clients.

3. Project Schedule and Project Management Plan

Please detail how your firm will complete the required scope of services and include the relevant key milestones and deliverables listed in *PART VI. Milestones and Deliverables*.

4. Cost Proposal

The College Fund has a budget of up to \$100,000 for Part 1, Phases 2 and 2 of this project and a budget of up to \$200,000 for Part 2, Phase 3 of this work. Using these guidelines, please provide the estimated cost of your services and their implementation.

- a. Provide a firm fixed-price cost proposal showing the associated cost to deliver the services outlined in *PART V: Scope of Services and provide all relevant deliverables in Part VI. Milestones and Deliverables*. Costs should be itemized, and a budget narrative should be included describing and justifying all costs.
- b. Indicate if your organization can invoice the College Fund monthly.

Closing Date and Time:

The College Fund must receive PDF copies of all proposals *by email* no later than Tuesday, February 1, 2022, at 5 p.m. Mountain time.

The College Fund Point of Contact:

Rebecca Garvoille, Ph.D.
Senior Learning and Evaluation Officer
rgarvoille@collegefund.org
303.426.6664

Proposal Preparation Guidelines:

- All proposals must be submitted in writing as an Adobe PDF document not to exceed ten standard 8 ½ X 11-inch single-spaced pages in 12-point type font. Any pages submitted beyond 10 standard 8 ½ X 11-inch pages will not be read.
- All proposals must be emailed to the College Fund point of contact listed.
- Proposals may not be changed after the submission deadline. Additional information may be requested by the College Fund after initial review.

Other considerations: The College Fund may waive a technicality in any proposal and make awards in a manner deemed in the best interest of the company.