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Request for Proposals: Facilitating ongoing learning for, and outcomes evaluation of California Regional Initiative for Social Enterprise (CA RISE)

Organization Overview

REDF (Roberts Enterprise Development Fund) is an intermediary organization that supports entrepreneurial leaders and their organizations through the investment of financial and human capital (capacity building, community building, and technical assistance). REDF invests solely in employment social enterprises (ESEs), businesses that achieve transformative social impact by providing employment, job training, and support. As mission driven businesses, ESEs employ and provide job training to individuals who have encountered barriers to gaining and maintaining employment due to experiences such as homelessness, incarceration, substance abuse, immigration, and educational disruption.

Launched in 2023, CA RISE (California Regional Initiative for Social Enterprise) marks the nation's first statewide capital and capacity-building investment in employment social enterprises. In partnership with the California Office of the Small Business Advocate (CalOSBA) and Lendistry, REDF serves as program lead for this \$25 million investment and will deliver customized technical assistance to businesses across the state that employ, train, and support talented Californians overcoming barriers to employment (see this [link](#) for details on how CA RISE defines these barriers). Together, these capital and capacity investments will grow the sector – and accelerate economic inclusion and mobility across California.

REDF is seeking a consultant/team of consultants to lead an evaluation of CA RISE as a pilot program that provides both direct services to ESEs and that seeks to build an ecosystem supporting these businesses. Primary deliverables for the evaluation will include developing materials for and potentially facilitating touchpoints to engage staff in learning as insights are surfaced, and a final report on the effectiveness and outcomes of CA RISE. Through this evaluation REDF is seeking to better understand:

- the outcomes for ESEs participating in programming and how those eventually contribute to the economic wellbeing of their employees,
- outcomes on our efforts to develop a network amongst these enterprises in California and a public sector ecosystem that supports ESEs, and
- lessons learned on implementing this pilot program.

CA RISE Program Model Overview

CA RISE support of Employment Social Enterprises includes the following activities:

Core programming --

- Grant Funding: Just over 60 ESEs have been selected to receive grant funding between \$150,000 and \$500,000, to support the sustainable growth of their business, increased economic mobility among their participant employees, or, in some cases, both.

- **Cohort Meetings and Workshop-Based Technical Assistance:** Selected ESEs will engage in bi-monthly cohort meetings that provide content, networking, and technical assistance.
- **In-person gatherings:** ESEs will meet with their peers two to three times over the course of the program during in-person gatherings with capacity building programming, and opportunities for peer-learning and deepening their network of ESE leaders.

Optional programming --

- **Customized Technical Assistance:** Based on an assessment of their current business operations and programming, selected ESEs will opt into engaging in either a structured technical assistance project, or a more flexible advisory period with expert consultants or ESE leaders to support the ESEs in moving towards their goals that align with CA RISE funding, and help them in addressing unique challenges.
- **Workshops:** These sessions will be open to any ESE in California who applied to CA RISE (regardless of whether they are in CA RISE), and will address common challenges (e.g., fundraising strategy).
- **Self-Service Tools:** Information and tools on specific topics (e.g., pricing) will be made available on [REDFworkshop](#).
- **Government Programs:** Support in identifying and accessing government programs (e.g., SNAP E&T), in the form of customized technical assistance, workshops, or self-service tools.

CA RISE ecosystem development -- CA RISE will also engage in assessing opportunities for connecting ESEs to the public sector while also seeking to develop a statewide ecosystem that fosters the development of an ESE network and increases support for ESEs. This work will include the following services, and development of content and recommendations:

Core Programming --

- **Education & Training:** Webinars and workshops for ESEs and public sector entities that enhance knowledge for both parties that can lead to successful partnerships. For ESEs, content will focus on building knowledge around public funding opportunities that can support ESE operations and program outcomes. Trainings for public entities will provide information on the benefits and opportunities for partnering with ESEs to improve outcomes for focus populations.
- **Convenings and site visits:** REDF will coordinate opportunities for public sector representatives and staff to engage with ESEs, visit their businesses, or for both parties to convene and connect.
- **Developing sustainability plans:** Based on the identification of available public resources, CA RISE will develop individualized sustainability plans for ESEs to explore government partnerships over the next three years.
- **Mapping and content development:** CA RISE will oversee consultants to assess the current landscape of public funding opportunities or programs that ESEs can leverage to bolster their businesses or programming that supports employees from focus populations. Information will also result in content development to strengthen ESEs' competitiveness and eligibility for government funding.
- **Strategy recommendations:** The aforementioned assessment of current opportunities and the public sector landscape will also result in the development of recommendations for strategies to better align service delivery between ESEs and the public sector and improving employment outcomes for focus populations.

CA RISE will launch in June 2024 and will run through September 2025. Program introductions will take place in May, followed by an in-person kick-off in June. Subsequent programming will be implemented along the following timeline:

- Bi-Monthly Cohort Meetings / Workshop-Based TA: August 2024 – August 2025
- TA, Advising and mentorship: September 2024 – September 2025
- Workshops: September 2024 – September 2025
- In person convenings: August, February 2024, June 2025

For more information on the program, please visit [REDF's CA RISE site](#). Note that additional details on implementation will be shared with the selected consultant(s).

Project Overview, Evaluator Expectations & Deliverables

As the program lead for an innovative, pilot program to provide services for ESEs in California, and foster the development of an ecosystem in the state that supports ESEs, REDF is seeking a consultant or team of consultants to evaluate the program. The evaluation should identify outcomes for participating ESEs within the context of greater model efficiency, outcomes pertaining to strengthening the network or ecosystem in California between ESEs and the public sector, and assess the successes in and challenges to implementing CA RISE. REDF will leverage this information to strengthen our understanding of what is required to sustain and scale such an initiative. The evaluation framework and process should also include regular learning opportunities for REDF during the program. The consultant(s) will collaborate with REDF's Learning and Evidence team to develop and implement a robust evaluation framework for CA RISE that incorporates the three following learning priorities:

- 1) Help REDF determine its effectiveness in implementing the CA RISE program to inform future program development and implementation, and identify successes and challenges in providing direct support to ESEs, and in developing trust and partnerships with various stakeholders (include public sector entities) to strengthen the ESE ecosystem.
 - a. Expectations of the evaluator: Engage REDF staff in iterative learning on this focus area by a) facilitating regular learning and reflection opportunities for the CA RISE team supported by learning materials/analyses of current findings; b) surfacing insights on successes and challenges in regards to program implementation; c) helping the team align on a set of tactical recommendations to improve effectiveness and efficiency in future program implementation or in scaling the current program; and d) supporting REDF in generating insights on these learning areas on a regular cadence so that REDF can integrate these into its quarterly reports for CalOSBA.
 - b. Time/priority expectations: we expect this might consume 20-30% of budgeted time (excluding the final report)
- 2) Support REDF in understand to what extent ESEs grew on business outcomes, in building peer networks, and in engaging with public sector stakeholders throughout the course of the program. If feasible, the evaluation should attempt to assess the extent to which ESE participant workers experience economic mobility outcomes. REDF is seeking to deepen its understanding of whether and to what degree, a more streamlined and efficient program model of providing capital, capacity building and community connections, benefit ESEs (or a subset), and their

workers. Our aim is to learn from this assessment to inform and improve future programming, and to support REDF's efforts in determining and sharing with external stakeholders how to best sustain and scale this work.

- a. Expectations of the evaluator: a) Coordinating with REDF on data sharing, b) defining whether additional data should be collected (such as qualitative information through ESE leader interviews), with what cadence and coordinating with REDF on data collection, c) supporting or leading on data analysis and triangulation to surface learnings and insights, d) developing materials on a regular cadence (e.g., case studies, outcome reports) that convey learnings to REDF staff (these may be leveraged to facilitate learning process described in section 1 above).
 - b. Time/priority expectations: we expect this might consume 70-80% of budgeted (excluding the final report).
- 3) Developing a final evaluation report that combines key themes from both elements above to share with REDF staff. The report should be comprehensive and enable REDF to use information and findings in a variety of communications to multiple audiences, including with CalOSBA and other stakeholders (ESEs, funders, etc.). The report should convey findings and contextualize them within the contexts of REDF's more streamlined program model, and external stakeholders' engagement and interest in developing a stronger ecosystem for ESEs.

The framework and methodology for the CA RISE learning and evaluation project should account for:

- The innovative nature of the program (as the nation's first statewide capital and capacity-building investment in employment social enterprises), and the significant opportunity available to learn from the pilot to support expansion or duplication.
- The short timeframe of program delivery (June 2024-December 2025).
- The variety of programmatic components that include providing direct services to ESEs, and building the foundation to better connect ESEs to one another and to the public sector.
- The program's focus on serving ESEs in rural, low-wealth, and disaster-impacted areas (amongst others), and those led by, and/or serving individuals with barriers to employment (defined [here](#)). As such, the evaluation design should reflect the program's aims to account for inequities impacting ESEs and their leaders.

Project Deliverables

In summary, the evaluator should meet the expectations described above, which include the following deliverables:

- Based on the discovery phase and initial discussions with REDF's Learning & Evidence team, a jointly agreed-upon evaluation plan that meets the goals of the evaluation as outlined in the project overview.
- Per the finalized evaluation plan, execute on gathering additional data, analyzing and triangulating with existing data collected by REDF, and developing materials (e.g., case studies, outcome reports) on a regular cadence to share learnings with REDF staff (see element 2 for more details).

- Facilitating a series of learning touchpoints with the CA RISE team that engage staff in reflecting on, or surfacing findings and themes, aligning on recommendations and developing insights and learnings to share with external stakeholders (see element 1 for more details).
- Developing a final report on the learnings and findings from the evaluation (see element 3 above for more details).

Additional Information

REDF Key Staff: The consultant will be working closely with two team members, [Gemma North, Senior Manager](#), Learning & Evidence and Jeff Bergquist, Senior Director, Capacity Building, to design and implement the evaluation (including coordination on data collection, interpretation, learning and analysis). The initial evaluation plan, and touchpoints or timelines for developing and sharing materials and facilitating learnings with program staff will also be informed by [Greg Erikson, Director](#) who oversees the CA RISE program and other senior leadership team members who oversee key program components. Depending on the approach and methodology, the evaluator(s) may interact with other CA RISE core staff members.

Anticipated Budget range: \$150,000-\$200,000

Anticipated Timeline: June 2024 - January 2026

Response Submission Process

To be considered for this project, **interested consultant(s) must first submit a complete response to the [CA RISE Request for Information, Opportunity 7](#)**. Any RFP applications that do not submit a response to the CA RISE RFI cannot not be considered.

Once this step is complete, the consultant(s) should submit a proposal that includes the information below. While there is no page limit, the proposal should be clearly written, persuasive, and focused with an emphasis on substance over length. Responses will be evaluated based on quality of content, rather than quantity.

1. Proposed Approach – provide a description of the approach you would take for this consultation and experience with different types of evaluation types that would lend themselves well to this work. Include how you would incorporate an equity lens into the evaluation.
2. Detailed Scope of Work – provide a description of anticipated activities and proposed timeline.
3. Roles and Responsibilities – describe the key roles that will execute the proposed activities and relevant experience and skills of key staff member(s).
4. Two to three work samples that exhibit relevant experience and quality in achieving project goals.
5. Budget – a line-item budget for the project.

Evaluation Criteria:

1. Strength of the proposed approach and Scope of Work (50 points):



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- a. Approach and SOW are clearly described and the activities and timeline should achieve the desired results.
- b. Approach incorporates elements of collaborative engagement and learning, and strong means of regularly surfacing insights during program implementation, supported through appropriate touchpoints and development of learning materials.
- c. Evaluation type(s) or approach(es) are conducive to the aims of the project, demonstrating flexibility and accounting for the particularities of CA RISE as a pilot initiative, succinct timeframe, and multi-pronged work in directly supporting ESEs and engaging in ecosystem development.
- d. Approach explains how the evaluation will be informed by an equity lens.

Experience evaluating workforce employment related initiatives would be an advantage, but not required.

2. The key personnel identified for the project has relevant experience, relevant skills to adapt to the fluid needs of a pilot project evaluation, and seems sufficient to carry out the proposed tasks and complete the project deliverables within the proposed time frame (20 points).
3. The scope of work and work samples are relevant to the opportunity, and demonstrate a quality in development of work product and evaluation implementation (10 points).
4. Price is reasonable for the proposed Scope of Work and within acceptable range. Proposals outside of range may possibly be considered provided there is a clear and strong rationale that supports meeting the evaluation goals. (20 points).

Proposals should be sent to Gemma North at gnorth@redf.org and are due by 11:59 PM Pacific time on Friday, June 14. Consultant(s) will receive notice of whether they are being considered by June 21, and interviews for finalists will be conducted June 24-28.