

# Community Health Funders Alliance

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## Request for Proposal (RFP)

### Community Health Funder Alliance (CHFA) Evaluation: Design, Plan, and Document

RFP Timeline	
RFP Announcement	Tuesday, March 30, 2021
RFP Submission Due Date	Tuesday, April 27, 2021
Target Contract Start Date	Friday, June 1, 2021

### About CHFA

The Community Health Funder Alliance is a collaborative of funders dedicated to improving health and wellness in Santa Fe and northern New Mexico. Launched in early 2020 by founding members, Anchorum St Vincent (ASV), CHRISTUS St. Vincent (CSV), and the Santa Fe Community Foundation (SFCF), the Alliance is committed to enhancing and strengthening the systems of care that address the community’s most challenging health and social needs with a unified funding strategy. The Alliance was founded on the belief that we can be more effective in achieving better health outcomes by aligning our strategies and investments as funders. For many nonprofit providers, a siloed funding process—and the reporting requirements of multiple funders—undermine their capacity to deliver essential services. By combining our community health funding resources and processes, the Alliance intends to work with community partners more effectively while decreasing the administrative burden, strengthen the system of care in our community, and achieve greater impact in priority health indicator outcomes.

### Our Goals

The Alliance’s goals are:

- **GREATER EFFICIENCY:** Decrease grantee administrative burden by aligning funding with a joint funding application and reporting.
- **DEEPER IMPACT:** Increase impact of our grantees through larger, multi-year “Health Impact Grants” and smaller, general operating “Community Grants.”
- **STRONGER SYSTEM:** Strengthen the system of care across the lifespan and use CSV’s [Community Health Needs Assessment](#) to inform collective work and funding priorities.
- **BETTER RESULTS:** Improve accountability toward results by using data to inform decisions and monitor performance using Results-Based Accountability.

- **STRONGER CAPACITY:** Increase grantee capacity by supporting the development of skills, capacity and sharing knowledge.

## Program Design

The Alliance has developed **two tiers** of grants as part of its funding strategy, creating multiple pathways for grantee partnerships:

- 1) *Health Impact Grants:* Proactive (Invitation Only), multi-year grant for strategic partners that provide critical services with demonstrated outcomes; and
- 2) *Community Grants:* Open, competitive, annual grant to strengthen broader nonprofit ecosystem with general operating support and create “larger” door for entry.

The Alliance targets health outcomes across the life span and social determinants of health using CSV’s [Community Health Needs Assessment](#) and the Results-Based Accountability (RBA) approach for identifying and tracking population health outcome indicators and performance measures.

Alliance members have pooled their funds and participate in a single funding process including joint application, review, recommendations, and reporting. In addition, the funders jointly contribute and participate in collaborative project management (with the support of a consultant), continuous learning, and external communications. An aspiration for future years is to cultivate other donors/funders to raise additional funds, expand the number of funder partners, and to increase our impact through strategic partnerships.

## Current Program Status and Activities

The Alliance is in Year 1 of an initial three-year collaborative funding program commitment (July 2020 – June 2023). In 2020, approximately \$1.8 million was awarded to 44 grantees including \$1.5 million to 17 *Health Impact Grantees* and \$350,000 to 27 *Community Grantees*. Over the three-year funding period, the Alliance expects to award at least \$4.8 million in grants.

The unfolding of Covid-19 soon after launch of the program required the Alliance to respond quickly to the crisis and grantee concerns by allowing flexibility in applications as needed, streamlining the review process, and providing emergency-response funding to specific grantees. The Alliance funder partners also engaged in a strategic learning process based on grantee applications and funded programs to assess gaps and opportunities to improve outcomes.

Grantees are expected to submit a report to the Alliance on their progress and performance measures for the 9-month period ending March 31, 2021 which will also serve as basis for decision making for the 2nd year funding of current grantees. An RFP for new 2021 Community Grant was announced in Spring 2021.

For more information about the Community Health Funder Alliance, please visit [www.communityhealthfunder.org/](http://www.communityhealthfunder.org/).

For more information about the Alliance’s funder partners, visit the following websites:

- Anchorum St. Vincent – [www.anchorum.org](http://www.anchorum.org)
- CHRISTUS St. Vincent - [www.christushealth.org/st-vincent](http://www.christushealth.org/st-vincent)
- Santa Fe Community Foundation – [www.santafecf.org](http://www.santafecf.org)

## Evaluation Project/Funding Opportunity

As the Alliance is planning its first-year grant reporting and the second-year funding cycle, the funder partners agree that it is time to identify an external consultant with expertise in evaluating philanthropic funding programs to help ensure that the work of the Alliance can be assessed with relevant data and information for impact and continuous learning and improvement.

The Alliance is seeking proposals from qualified and experienced consultants for evaluation services to design, plan, implement and document an evaluation of the Alliance’s approach and activities **over a 30-month period from June 2021 - November 2023**.

## Proposed Project Timeline and Deliverables

*Exact Contract Period and Proposed Project Timeline and Deliverables may be negotiated/adjusted if needed.*

<b>May 2021</b>	<b>Consultant selected and project begins</b>
<b>June 2021 - August 2021</b> (Initial 3 months)	<b>Phase 1: Orientation &amp; Evaluation Plan Development</b> <ul style="list-style-type: none"> <li>• Orientation to program</li> <li>• Review and recommend data collection instruments and protocols</li> <li>• Gather and review existing program records and performance measures data</li> <li>• Detailed evaluation plan proposed and accepted</li> <li>• Provide initial feedback in program design and first year implementation for learning and improvement</li> </ul>
<b>Sept 2021 – June 2023</b> (approx. 22 months)	<b>Phase 2: Ongoing Data Collection, Evaluation &amp; Learning</b> <ul style="list-style-type: none"> <li>• Identify and establish baseline information</li> <li>• Implement new data collection, analysis, and evaluation in accordance with evaluation plan</li> <li>• Conduct interviews and facilitated meetings with stakeholders including grantees and funder partners</li> <li>• Provide interim/progress evaluation reports and feedback for continuous and strategic learning and improvement</li> </ul>
<b>July 2023 – November 2023</b> (approx. 5 months)	<b>Phase 3: Final Report and Deliverables</b> <ul style="list-style-type: none"> <li>• Produce and submit final evaluation and learning report including executive summary (draft report to be provided to CHFA working team in advance)</li> <li>• Present and discuss lessons learned and reflections with funder partner staff, leadership, and external stakeholders as appropriate</li> <li>• Support generating derivative products for website, annual report, and other communication channels as appropriate</li> </ul>

## Project Scope

The contractor will develop and execute a purposeful evaluation and learning plan for the two programs, Community Grants and Health Impact Grants - to assess our approach, processes, and partnerships and the impact of our intervention and investment in the communities we serve. The plan should include an assessment of what is and is not working toward achieving our intended goals and help identify opportunities to enhance the program and impact with information from variety of sources. Recognizing that the Alliance is in its early stage of implementation, the evaluation should support continuous learning agenda and improvement in strategy and implementation over the three-year funding period as well as the final evaluation report.

We expect the evaluation services to include:

- 1) Evaluation framework and plan – Develop evaluation design and implementation plan including purpose, key evaluation questions, program description and the criteria and standards to be used.
- 2) Existing material review - Review key program materials, including program strategy, grant application and review process, and grantee reports.
- 3) Baseline information - Help to identify and establish any baseline information including population outcome indicators and/or program performance measures.
- 4) Data collection – Collect data from a variety of sources to answer both quantitative and qualitative evaluation questions about the activities of the Alliance programs, the various results it has had, and the context in which it has been implemented.
- 5) Analysis and learning - Analyze the data for common themes and key areas of learning (i.e., learning for funder collaborations, grant recipients, local stakeholders, etc.).
- 6) Overall assessment/conclusion - Combine data assessments to assign value regarding Alliance performance and share recommendations for future work.
- 7) Report and Presentation – Draft, submit and present findings/lessons learned with progress and final reports; early releases of information may help to inform mid-course corrections.
- 8) Other - Evaluation services and efforts should provide a sense of how we are doing as a funder collaboration, what's working and not working toward achieving our intended goals and inform our practices as they evolve with any short-term or interim measures of success and continuous learning to identify opportunities for improvement and growth.

## Proposal Requirements

The contract will be approximately 30 months in duration from June 2021 – November 2023. Applicants are expected to submit a work plan and budget that is right-sized, appropriate and aligns with the program being evaluated as well as the project scope, timeline and expected deliverables. The submission should include:

- **Organization Name and Primary Contact Information**
- **Brief Cover Letter**

- **Proposal Narrative** including:
  - **Approach to Services for the Scope of Work** including the process, data sources and methods you propose to achieve the deliverables.
  - **Overall Work Plan and Key Milestones for Deliverables** over the course of the 30-month contract period.
  - **Organizational History and Qualifications** describing relevant experience and qualifications, especially for collaborative funding and other philanthropy programs. Provide a summary of qualifications and/or bio of your organization’s key staff and specific evaluator(s), personnel or subcontractors(s) who will have a role in this project.

*[Guidelines for length for this section: please do not exceed six pages]*
- **List of Recent Clients**, especially for evaluation services of collaborative funding or other philanthropic programs, particularly in the areas of health.
- **3 Professional References**. Provide names, position and contact information including a short description of your relationship with the reference.
- **Additional information** depending on the organization type:
  - For nonprofit organizations, please submit:
    - Most recent annual audit report if available; if not, most recent annual financial statements including income statement and balance sheet
    - Most recent IRS Form 990 or 990-EZ tax return
    - Current year approved annual budget, income statement, and balance sheet with breakdown
  - For for-profit organizations and independent contractors, please submit:
    - Completed W-9 form
    - Note that payment for services will be made upon submission of invoices, if selected
- **Proposed Project Cost/Budget and Expected Payment Schedule** with total and detailed breakdown for the evaluation services over the course of the 30-month project duration. Budgets may be presented using basic expenditure categories or costs-per-activity including descriptions for expected hourly rate and number of hours, travel related to the project, and other direct and indirect costs. Provide information on preferred payment method and expected payment schedule if selected by date or by key phases/milestones. *The Alliance reserves the right to negotiate proposed costs and payment schedule.*

## Submission Deadline and Point of Contact

Prospective contractors are requested to submit applications via email to [info@communityhealthfunder.org](mailto:info@communityhealthfunder.org) by **Tuesday, April 27, 2021, 5pm MDT**.

Please title your email subject line as **“RFP: CHFA Evaluation – [Your/Organization Name]**.

If you have questions or would like to discuss this Request for Proposal further, please contact Loe Marcoline, Program Manager for Community Impact at Anchorum St. Vincent at [Imarcoline@anchorum.org](mailto:Imarcoline@anchorum.org) or (505) 310-9559.

## **Qualifications and Eligibility Requirements**

The Alliance will accept and review proposals from a range of organizations and contractors, both locally and nationally based. Applicants may submit a proposal to work independently or with a partner organization; however, one lead contact should be designated for the application process. Preference will be given to prospective contractors with experiences in evaluating collaborative funding and/or other philanthropic programs, particularly in the area of health.

## **Proposal Review and Evaluation**

Proposals will be reviewed in accordance with the requirements of this RFP in a two-step process with joint decision making by the Alliance funder partners – 1) Initial Review by the Alliance Working Team, and 2) Finalist Review and Decision with the Alliance's Executive Team.

Applicants/finalists may be invited for interview or we may request additional information to ensure full understanding of the proposal. The Alliance reserves the right to negotiate modifications to an applicant's proposal prior to final award for the purposes of obtaining the best and final offers with mutual agreement.