

Evaluation of the Nonprofit Marketplace Initiative

Request for Proposals

August 22, 2011

THE WILLIAM AND FLORA
HEWLETT
FOUNDATION

The Philanthropy Program at the William and Flora Hewlett Foundation seeks an independent research consultant or team of consultants to lead an evaluation of the Program's Nonprofit Marketplace Initiative.

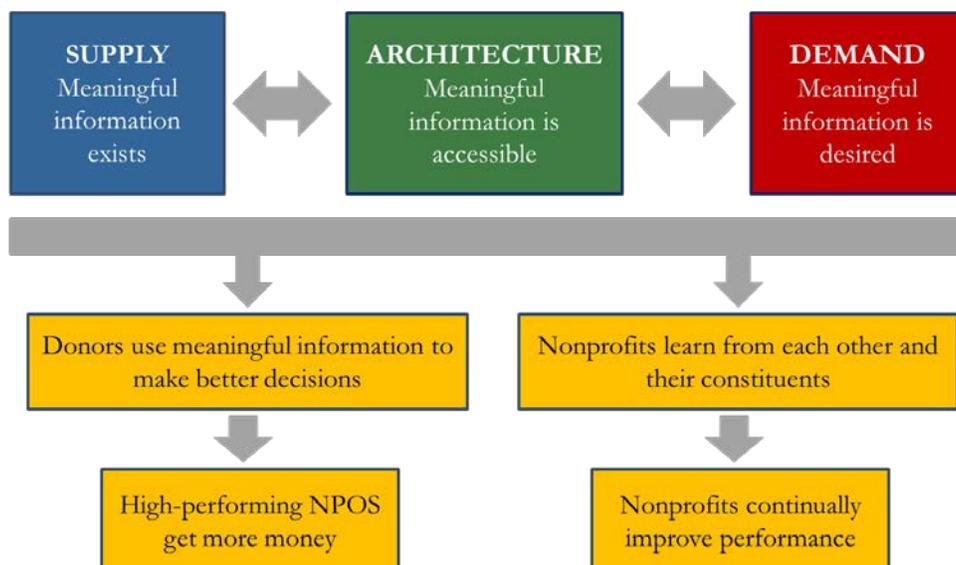
Initiative description

Since 2001 the Hewlett Foundation has invested about \$16.5 million to build a stronger marketplace for philanthropic giving through the Nonprofit Marketplace Initiative. We believe that a strong philanthropic marketplace is one where a significant proportion of donor decisions informed by high-quality data about nonprofit performance. We would consider it success if 10% of individual philanthropic donations in the United States (approximately \$20 billion per year) were influenced by high-quality performance information by 2015.

We believe that three things must happen for us to reach this goal:

1. High-quality nonprofit performance information must exist (“supply”)
2. Donors must desire such information (“demand”)
3. Donors must be able to access the information (“architecture”)

Nonprofit Marketplace Initiative – Conceptual Framework



The Initiative's strategy directly maps to these three prerequisites, with specific clusters of grants under each sub-strategy. The Nonprofit Marketplace Initiative has included both general operating support grants to anchor organizations like GuideStar and project grants for work like Hope Consulting's for research on donor behavior. In addition to grants, the Program's staff has dedicated a significant amount of time to research, writing, speaking, and convening to advance the Initiative's work.

From 2001-2009 the Philanthropy Program also had a related strategy—what we called “Donor Education”—dedicated to helping wealthy individuals become more effective philanthropists. This was a separate component, but it supported prerequisite #2 above by building donor demand for high-quality performance information.

Evaluation description

We seek a study that analyzes the Initiative's impact (or lack thereof) and helps guide our future strategic and tactical decisions. Optimally, we would prefer an analysis that was longitudinal, quantitative, and demonstrated direct attribution (or lack thereof). We recognize, though, that it may not be realistic to achieve all three characteristics immediately. We seek help to:

- **Assess the Initiative's overall progress.** Is there yet evidence of changed donor behavior or belief? Has the supply of information about nonprofit performance changed in a meaningful way? Is it easier for donors to access good information? If there is evidence of progress in any or all of these areas, is there reason to believe that the Nonprofit Marketplace Initiative contributed to that progress?
- **Assess the Hewlett Foundation Philanthropy Program's performance in guiding this Initiative.** Has our strategy been coherent? Has it relied on the best available evidence? Have our grants been aligned with that strategy? Have Hewlett staff been effective in supporting and aligning efforts among grantees and allies?
- **Establish a quantitative, longitudinal evaluation framework for the Initiative going forward.** Ultimately, this strategy hinges on changes in donor behavior (whether conscious or unconscious) so we need to solidify an assessment framework to help us track how that behavior may or may not shift over time. The 2010 Hope Consulting “Money for Good” study offers one potential starting place: survey questions on donor use of performance information that may offer a quantitative baseline that could be made longitudinal with future studies. If the consultant finds data that would immediately offer a retrospective, longitudinal view, that would, of course, be even better.
- **Strengthen the monitoring system used to track progress in the Initiative.** The Program currently has a monitoring system in place for the Initiative.¹ However, that system could be intellectually and operationally strengthened and we seek recommendations for doing so.

¹ Currently, we annually track four metrics for the Initiative: (1) total giving through high-quality philanthropy portals, (2) total usage of those sites, (3) the number of available profiles of nonprofits, and (4) the number of back-end interconnections among the key platforms.

Process and Timeline

The timeline to the right indicates our hopes for this process. If circumstances warrant, we will consider requests to shift this timeline.

We ask that interested parties indicate interest so that we can fairly and efficiently communicate with all potential bidders. Indications of interest are not an obligation to submit a proposal.

Target Timeline	
Release RFP	August 24, 2011
Deadline to indicate interest	September 9, 2011
Bidders' call	September 12, 2011
Deadline for proposals	October 12, 2011
Announcement of winner	October 20, 2011
Kick-off meeting	November 8, 2011
Mid-project report	January 20, 2011
Final deliverables due	March 30, 2012

Deliverables

We anticipate that the core deliverable will be a summary document of 10-40 pages.

Generally, we believe that monitoring and evaluation should be externalized as much as possible. By “externalized,” we mean that the information generated in evaluative processes should be made available to stakeholders outside of the funder or evaluated organization. Accordingly, we would hope to make the results of this project public.

With that said, we recognize that there are some types of analysis best kept private. The Program and the evaluator will decide together whether it is appropriate to redact some sections and have a separate public version of the summary document. We would anticipate a conversation with the evaluator to clarify the intellectual property plan for the public version of the summary document.²

Partnerships

This is a complex project on a complex topic. Some organizations or individuals may feel qualified to execute part but not all of the project. Accordingly, we welcome partnerships among organizations or individuals in the bidding process. To facilitate potential partnerships we will compile a list of interested parties (including contact information) and send it to the group ahead of the bidders' call.

Audiences

This evaluation will inform conversations about the future direction of the Initiative. The primary audiences for the evaluation's results are select Hewlett Foundation staff and the Foundation's Board of Trustees. The secondary audience is other stakeholders in the field of philanthropy to use as input as they plan and evaluate their own work to strengthen philanthropy.

² Generally, we prefer that public deliverables be released under open licenses, typically the Creative Commons Attribution-only license. <http://creativecommons.org/licenses/by/3.0/>

Resources

A set of the Philanthropy Program's internal strategy, evaluation, and planning documents will be made available to those considering participation in the bidding process. Additional documents will be made available to the winning bidder(s).

Also, in the fall of 2011, the Program is launching a public "philanthropic infrastructure dashboard" with basic information about the nonprofit sector and the organizations that support it. The dashboard includes information on philanthropic funding flows, usage rates of philanthropy websites, donor behavior patterns, etc. This database underlying the dashboard may serve as a useful baseline for data collection and will be shared with bidders.

We will also make whatever introductions we can to facilitate interviews.

Budget

Total bids should not exceed \$200,000, inclusive of an estimate for expenses.

Proposal Guidelines

The proposal should be no longer than 10 pages in length and should include the following components:

- Narrative description, including but not limited to:
 - Overview of proposed methodological approach for the evaluation
 - Rationale for using that approach
 - Planned methodology for collecting data
- Work plan
- Preferences (if any) regarding intellectual property
- Biographies of research team and estimated hours
- Projected budget

Contact

Please contact Jacob Harold, Program Officer, Philanthropy Program, at jharold@hewlett.org or 650-234-4617 with any questions.

Please RSVP for the bidders' call by September 9th to Sara VanLear at svanlear@hewlett.org or 650-234-4631.