

# **Enterprise Community Partners, Inc.**

## **REQUEST FOR PROPOSALS**

### **Evaluation Consultant to Support the New York State Mobility Counseling Program Expansion**

April 2022

#### **PURPOSE**

Enterprise Community Partners, Inc. (Enterprise) has initiated a Request for Proposal (RFP) process to support the evaluation of the expansion of the New York State Mobility Counseling Program.

#### **OVERVIEW**

Enterprise seeks a contractor to support the evaluation of the New York State Mobility Counseling Program (the Program). The Program provides financial support and technical assistance to community-based organizations working with tenants in underserved communities to ensure that families using Housing Choice Vouchers (HCVs) can access housing options in communities with low poverty rates, high-performing schools, and other crucial resources that meet their needs. The Program also offers support through tenant and landlord outreach and education, housing search assistance, and pre- and post-move support services. The Program has been operating in Buffalo and Long Island and is now expanding statewide.

The contractor will serve as an evaluation consultant, facilitating the evaluation of the statewide expansion of the Program. The contractor will work closely with the Enterprise team in designing and conducting the evaluation.

The selected contractor must demonstrate experience with program evaluation of this type and the ability to deliver on the proposed scope of work. In particular, the consultant (or consultant team) should have demonstrable experience with mobility counseling and/or voucher programs and the provision of community-based services, particularly among low-income populations.

#### **Important Dates**

RFP Open: April 28, 2022

Proposals Due: 8:00PM ET on May 27, 2022.

Award Notification: June 10, 2022

Period of Performance: June 15, 2022 – March 31, 2023

## **I. ABOUT ENTERPRISE**

The mission of Enterprise Community Partners, Inc. (Enterprise) is to make home and community places of pride, power and belonging, and platforms for resilience and upward mobility for all. Enterprise is the only national nonprofit that addresses America's affordable housing crisis from every angle, combining 40 years of experience, thousands of local partners and the expertise of over 1,100 employees nationwide. We bring together nationwide know-how, policy leadership, partners, donors and investors to multiply the impact of local affordable housing development.

## **II. PROGRAM OVERVIEW**

Enterprise currently supports the administration and management of the New York State Mobility Counseling Programs (the Program). The Program pilot, launched in early 2020, provides financial support and technical assistance to community-based organizations working with tenants in underserved communities to ensure that families using Housing Choice Vouchers (HCVs) can access housing options in communities with low poverty rates, high-performing schools, and other crucial resources that meet their needs. The Program also offers support through tenant and landlord outreach and education, housing search assistance, and pre- and post-move support services. The Program has been operating in Buffalo and Long Island and is now expanding statewide in partnership with New York State. This program is made possible by a grant from the Housing Trust Fund Corporation, which is funded through Section 8 Housing Choice Voucher Program grants from the U.S. Department of Housing and Urban Development.

Enterprise's support of partnering community-based organizations includes the administration of passthrough grants, facilitation of technical assistance, program monitoring and evaluation, and the creation of regular peer-sharing opportunities. To support this work, Enterprise has partnered with Mobility Works, a consortium of nonprofit members led by the Poverty Race Research Action Council (PRRAC), to administer additional technical assistance to each program and to leverage best practices from their national network of mobility counseling programs.

The contractor will serve as an evaluation consultant, designing an evaluation of the statewide expansion of the Program and creating related data collection tools, processes, and reporting templates. The contractor will work closely with the Enterprise team throughout the process of implementing this scope of work.

## **III. SCOPE OF WORK AND DELIVERABLES**

### **Evaluation Overview**

Evaluation and continuous improvement are important priorities for Enterprise's work. Throughout the pilot phase of the Program, Enterprise identified a range of metrics associated with the four basic categories (input, activity, output, and outcome) of performance measures that are being tracked by the mobility program teams within the partner community-based organizations. The program teams report on these quantitative and qualitative performance measures on a quarterly basis. Examples of the performance measures relevant to the Program may include:

- Families Supported (# of families targeted for outreach, # of families moved to eligible opportunity areas, cost per successful placement, types of service access, utilization of services, etc.)
- Landlord Engagement (# of landlords engaged, # landlords participating, # landlords new to HCV program)

- Effective Landlord Incentives (monetary, non-monetary incentives, mix of monetary/non-monetary)
- Educational Achievement (academic enrollment, educational referrals, percentage of school-aged children maintaining passing grades, etc.)
- Employment (percent of employed heads of households with increased earnings, employment referrals, etc.)
- Exposure to Healthier Neighborhoods (poverty rate, improved mental and physical health, healthcare access and utilization, etc.)

Enterprise also collects quarterly narrative reports that provide important context on overall program performance, existing program protocols, needed program refinements, client testimonials, and lessons learned through the pre-move, housing search, and post-move process.

The evaluation consultant will build on this work to design an evaluation plan and accompanying data collection and reporting infrastructure for the Program as it prepares to enter into state-wide expansion across several jurisdictions with varying HCV programs, family needs, housing markets, and socioeconomic conditions. As such, the consultant should have demonstrable experience with mixed-methods evaluations focused on economic mobility initiatives, affordable housing programs, mobility counseling and/or voucher programs, and the provision of community-based services, particularly among low-income populations.

### **Primary Evaluation Tasks**

The following section describes the anticipated evaluation tasks that the consultant would complete. As part of the proposal process, we welcome consultant recommendations for modifications or additions to these evaluation tasks that would generate additional value and further advance the overall project goals. Consultant proposals must clearly address each of the following tasks in their proposal, even if alternative tasks or methods are proposed.

- 1. Review existing program metrics and data collection approach** | The evaluation consultant will be able to review the existing program materials, existing metric and narrative reports, and data collection approaches as a foundation for the rest of the scope.
- 2. Refine evaluation goals and intended metrics and create a draft evaluation plan** | The consultant will use the information gained in Task 1 to refine the Program's evaluation goals and theory of change, as well as to develop an updated set of output and outcome metrics to measure program performance. This process may include establishing specific performance benchmarks for the program. In addition to ongoing performance measures, Enterprise is interested in assessing program performance as well as short- and long-term program outcomes related to education, health, income, service needs, and tenant and landlord engagement. The consultant will provide recommendations for a variety of program outcomes, including those stemming from a participant move to an opportunity area, as well as outcomes from related counseling services.

The evaluation plan created as part of this task should reflect the use of both quantitative and qualitative data to inform Enterprise and its partners understanding of Program performance, participant and landlord outcomes, and lessons learned through implementation.

- 3. Convene an advisory group to provide input on the evaluation plan, theory of change and**

**intended metrics** | In partnership with the Enterprise team, the consultant will convene an advisory group of stakeholders and experts to provide input on the refinement of the Program's theory of change, intended measures, performance benchmarks and data collection strategies that will be reflected in the draft evaluation plan described in task 2. It is expected that the advisory group will convene 2-4 times as part of this process.

4. **Develop & test updated data collection tools and protocols** | To facilitate data collection that will enable measurement of selected metrics against program goals, the consultant will develop a data collection plan and protocols. The consultant will also develop the necessary data collection tools to use in implementation of the evaluation or provide recommendations for use of third-party software for data collection. Data collection tools may include client intake forms and surveys, quantitative and qualitative reporting templates for service partners, or use of third-party software reporting. This process will include working with the partner organizations that currently deliver the Program's services to explore the most effective ways to collect baseline data and set partners up to track longer-term outcomes. The consultant should identify opportunities for collecting both quantitative and qualitative information as part of the data collection approach.

As part of this effort, the consultant will identify improvements to existing data collection systems and identify opportunities for standardization in metrics and data collection across multiple service providers. The consultant should rely on current best practices and tools for managing mobility counseling program data to ensure that programmatic challenges can be adequately addressed and that a comprehensive analysis and report of the programs can be created for internal and external stakeholders as needed.

The consultant will test the data collection tools with the two existing Program partners over a three-month period, and then refine the data collection plan and protocols as well as the data collection tools based on the lessons learned through the piloting process.

5. **Produce a reporting template** | The evaluation consultant will create a reporting template that Enterprise and partners can use on a quarterly or annual basis to summarize output and outcome data collected through the implementation of the consultant's proposed evaluation plan. The report should provide a mechanism for Enterprise to report on both qualitative and quantitative information gathered through the evaluation.
6. **Develop a long-term evaluation plan** | The evaluation consultant will develop a long-term evaluation plan for the Program. The plan will reflect ongoing data collection, Program reporting and opportunities for continuous improvement, as well as recommendations for milestones at which Enterprise should undertake a deeper analysis of program implementation and impact.

## **Expected Deliverables**

Expected deliverables include:

- Monthly progress reports
- Draft evaluation plan, including a theory of change, performance metrics, short-term and long-term outcomes, recommended program benchmarks, recommendations for ongoing reporting and opportunities for continuous improvement. The evaluation plan should highlight relevant best practices and learnings from the advisory group that informed the evaluation plan.
- Final evaluation plan, refined based on feedback from Enterprise and core partners
- Draft data collection tools and protocols (or recommendations and protocols for use of third-party data collection software)
- Final data collection tools and protocols that have been refined based on lessons learned through pilot implementation of the tools.
- Example reporting template for Enterprise's use, reflecting initial pilot data collected
- Recommendations for long-term program evaluation and reporting

## **IV. BUDGET**

Enterprise anticipates selecting one evaluation consultant (or consultant team) to complete the tasks described in this RFP. The anticipated budget is between \$75,000-\$125,000. The submitted budget narrative should identify the cost per evaluation task to complete the above scope of work. The contract will be structured on a cost reimbursement basis.

## **V. PROPOSAL MATERIALS**

All proposal materials will be submitted via SlideRoom (link included below). Responses should include the following materials:

1. Cover Letter: Please include a cover letter on company letterhead (should include the name, title, address, telephone number, and e-mail address for point of contact for the applying organization).
2. Small, Minority and Women's Business Enterprises (please select all that apply):
  - Minority Business Enterprise
  - Native American Business
  - Small Business
  - Women-Owned Business
  - Veteran-owned small business
  - Service-disabled veteran-owned small business
  - SBA certified small disadvantaged business
  - SBA certified 8(a) firm
  - SBA certified HUBZone firm
3. Qualifications: Please provide information on the organization's relevant experience with:
  - Evaluating programs that focus on housing, community-based services, voucher programs, or mobility counseling programs, with a focus on low-income populations
  - Mixed-methods evaluation approaches
  - Developing robust evaluation plans with accompanying data collection procedures and tools
  - Evaluations focused on a program being implemented across multiple community-based

- organizations and geographies
  - Embedding racial equity into program evaluation
- 4. Resumes and Bios: In one document, please list resumes and bios for each individual on the team, including information about experience with similar projects and professional qualifications. Please identify individuals that will provide technical assistance to grantees as part of the proposed scope of work.
- 5. Past Project Work Samples: Based on the past projects identified in the qualification section, attach samples of completed work (no more than three).
- 6. Past Project Work Sample #1.
- 7. Past Project Work Sample #2.
- 8. Past Project Work Sample #3.
- 9. Narrative: Please describe your organization's planned approach to each of the evaluation tasks outlined in this RFP. (limit 4 pages)
- 10. Budget: Provide a proposed budget that includes the breakdown of cost for each task described in this RFP, Include labor rate or price listing of all rates for all individuals who will work on the project.
- 11. Contact Information of Clients: Based on the past projects identified in the qualification form, attach current contact information of clients for whom similar services were provided (no more than three).
- 12. Contact Information of Client #1.
- 13. Contact Information of Client #2.
- 14. Contact Information of Client #3.

## **VI. SELECTION CRITERIA**

Applicants will be evaluated on the following characteristics:

- a. Qualifications– 30%
  - The applicant has the qualifications necessary to successfully implement the proposed evaluation tasks.
  - The applicant has prior experience working on similar evaluation projects
  - The applicant has prior experience designing evaluations for programs that are implemented across multiple community-based organizations
- b. Past Projects and Staff Experience – 15%
  - Quality and relevance of submitted work samples.
  - Demonstrated expertise of key personnel, including experience with and knowledge of mobility counseling programs (or related programs)
- c. Approach – 35%
  - The proposal demonstrates an understanding of the objectives of the evaluation of the

- Program and desired results of the key evaluation tasks.
  - The proposal illustrates an approach to the scope of work that will likely lead to successful results.
  - The proposal illustrates the contractor's ability to successfully execute the proposed approach in line with the project's goals.
- d. Budget – 20%
- The proposal includes a detailed budget for each of the tasks described within the scope of work.
  - The proposed costs are reasonable for services offered.

In addition, Enterprise may contact references to confirm quality of work and a history of responsiveness and good communication skills.

Enterprise will select the proposal which it determines will deliver the highest quality deliverable at the best value. Proposals will be evaluated using the weighted criteria identified above. The award will be made to the highest scoring applicant.

Enterprise, in its sole discretion, may request proposal interviews or presentations by meeting with any and all applicants to clarify or negotiate modifications to proposals and inform final proposal scoring for consultant selection. However, Enterprise reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, that the applicant can propose.

## **VII. SUBMISSION INSTRUCTIONS**

Proposals are due by 8:00PM ET on May 27, 2022.

Inquiries concerning this RFP should be directed to Lindsay Eilers ([leilers@enterprisecommunity.org](mailto:leilers@enterprisecommunity.org)) no later than May 11, 2022.

Proposals must be submitted in SlideRoom by clicking here:  
<https://enterprise.slideroom.com/#/permalink/program/66394>

All costs incurred in the preparation of a response to this RFP are the responsibility of the applicant and will not be reimbursed by Enterprise.

By submitting a proposal, applicant commits to the terms and conditions outlined in this RFP. Requests for exception to any terms or conditions must be submitted with the proposal. Enterprise reserves the right to deny requests for exception to any terms and conditions. Requested exceptions will be factored into Enterprise's consideration of award.

## **VIII. RIGHT TO REJECT**

Enterprise reserves the right, in its sole discretion, to reject any and all responses received in response to this RFP. A contract for the accepted response will be based upon the factors described in this RFP.

## **IX. SMALL BUSINESSES, MINORITY-OWNED FIRMS, AND WOMEN'S BUSINESS ENTERPRISES**

Enterprise will make efforts to utilize small businesses, minority -owned firms, and women's business enterprises.

## **X. CONFIDENTIALITY**

If the applicant deems any materials submitted to be proprietary or confidential, the applicant must indicate as such in the relevant section(s) of the response.

## **XI. NOTIFICATION OF SELECTION AND TIMELINE**

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## **XII. CONFLICT OF INTEREST**

The applicant must disclose, in an attachment to the proposal, any possible conflicts of interest that may result from the award of the contract or the services provided under the contract. Except as otherwise disclosed in the proposal, the applicant affirms that to the best of its knowledge there exists no actual or potential conflict between the applicant, the applicant's employees or their families' business or financial interests ("interests") and the services provided under the contract. In the event of any change in either interests or the services provided under the contract, the applicant will inform Enterprise regarding possible conflicts of interest, which may arise as a result of such change and agrees that all conflicts shall be resolved to Enterprise's satisfaction or the applicant may be disqualified from consideration under this RFP. "Conflict of interest" shall include, but not be limited to the following:

1. Giving or offering a gratuity, kickback, money, gift, or anything of value to an Enterprise official, officer, or employee with the intent of receiving a contract from Enterprise or favorable treatment under a contract;
2. Having or acquiring at any point during the RFP process or during the term of the contract, any contractual, financial, business, or other interest, direct or indirect, that would conflict in any manner or degree with applicant's performance of its duties and responsibilities to Enterprise under the contract or otherwise create the appearance of impropriety with respect to the award or performance of the contract; or
3. Currently possessing or accepting during the RFP process or the term of the contract anything of value based on an understanding that the actions of the applicant or its affiliates or interests on behalf of Enterprise will be influenced.

## **XIII. APPLICABLE REQUIREMENT**

The selected applicant(s) will be required to comply with the Standard Terms and Conditions attached to this RFP as Attachment 1, including (submitting prior to contract execution) proof of insurance as set forth in the Standard Terms and Conditions. The selected applicant(s) will also be required to comply with the Additional Provisions attached to this RFP as Attachment 2. The Additional Provisions apply to the eventual contract that will be awarded.

## **XIV. ATTACHMENTS**

Attachment 1: Enterprise Standard Terms and Conditions

Attachment 2: Additional Provisions