



# REQUEST FOR PROPOSALS

AMERICAN FRIENDS SERVICE COMMITTEE

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## EVALUATION OF STRATEGIC PLAN GOALS

### 1.0 Background and Purpose

The American Friends Service Committee (AFSC) is a Quaker organization that includes people of various faiths who are committed to social justice, peace, and humanitarian service. Based on the Quaker belief in the worth of every person and faith in the power of love to overcome violence and injustice, the work of AFSC addresses local, regional, national, and international problems such as poverty, injustice, inequality, and discrimination. Established in April 1917 to provide young Quakers and other conscientious objectors an opportunity to serve those in need instead of fighting during World War I, AFSC encourages people toward self-empowerment, while urging them to find and use pragmatic and nonpartisan ways to share in the hope of reducing violent confrontations.

Together, AFSC programs align to accomplish goals in the areas of Economic Justice, Healing Justice, Human Migration and Mobility, and Peace and Conflict Resolution. To enable grassroots work around the world, AFSC has local offices in 14 regions, nine in the United States, and five international offices serving Africa, Asia, Europe, Latin America / Caribbean, and Middle East.

Over the past five years, AFSC has gone through considerable change with the aim of improving the effectiveness and impact of programs. These changes have included a refreshed strategic planning process. Key to this refreshing process was a review of the goals, objectives and intermediate results that set the direction of all AFSC work. The regional offices, being directly responsible for achieving the mission of the AFSC, have adjusted planning processes that now make it possible to relate all regional work to a goal and one or more strategic objectives.

AFSC has initiated an organization-wide evaluation process to assess impact toward meeting overall goals and strategic objectives. The initial stage of this evaluation process has recently been completed, an evaluation of the Peace and Conflict Resolution Goal. The focus of this evaluation is on determining impact of AFSC work, over the past five years, within the three remaining goal areas of the Strategic Plan: Human Migration and Mobility Goal, Healing Justice and Economic Justice.

Projects related to these goal areas occur within nine U.S. regional offices of the AFSC. Related advocacy work is carried out through the Public Policy and Advocacy Office in Washington, D.C. The five-year scope of work for this evaluation is outlined below by goal area:

Goal	Current # of Programs and Projects	Current Annual Budget	Approximate # of Full-time Equivalent Staff
Human Migration and Mobility	18	\$ 2.5 million	34.7
Healing Justice	10	\$.94 million	14.3
Economic Justice	12	\$.95 million	12.2

Evaluation findings and recommendations will inform future strategic planning and organizational learning processes. AFSC through its Strategic Planning Committee is seeking proposals to complete this evaluation of Strategic Plan Goals. The final report will contain evaluations of each goal and a summary of any cross-cutting findings and recommendations relevant to all goal areas.

## 2.0 Requirements

The primary driver for the Strategic Plan Goals evaluation is a heightened concern regarding the effectiveness and impact of AFSC work. The Strategic Plan Goals evaluation includes three broad areas to be assessed *for each goal area* with these overarching questions framing the approach:

- To what extent is the work of each goal contributing to a long-term positive effect on people?
- How is the AFSC making a difference (e.g., to what extent is the goal helping the AFSC to achieve its mission and vision?)

This section provides details for each of these three areas to be assessed and identifies primary evaluation foci. Appendix 1 provides a matrix that organizes the evaluation foci and will be used as a planning tool as a research methodology is finalized.

### Impact and Effectiveness

Assess the impact of each goal’s programmatic efforts to date in relationship to stated objectives and intended results. Discuss, as well, the effectiveness of the combined program work within each goal area, providing a systematic assessment of progress based on data for the stated goal and strategic objectives. (Data already collected should provide much of the basic information).

### Efficiency of Planning and Implementation

Assess whether resources available are sufficient to achieve program objectives in each goal area. Assess how the additional impact of the significant downsizing of AFSC in 2009 has affected the achievement of the goal and strategic objectives. Assess other program management and support factors that may be affecting program impact.

### Potential for sustainability, replication and magnification

Assess the key factors affecting sustainability toward achieving each goal. Assess and make recommendations on the key strategic options to strengthen or improve each goal in the future.

The evaluation will focus on the following goals and strategic objectives from the AFSC Strategic Plan 2003 – 2010 as revised in October 2008:

*Human Migration and Mobility Goal:* Immigrants, internally displaced persons (IDPS), and refugees achieve justice, dignified treatment and protection of their civil and human rights.

Strategic Objective 1: More immigrants, internally displaced persons (IDPS), and refugees exercise their civil and human rights.

Strategic Objective 2: Humane and fair immigration and refugee policies are established at local, state and national levels.

Strategic Objective 3: Public attitude change (in specific communities) toward acceptance, respect and the equal participation of immigrants, internally displaced persons (IDPS), and refugees.

Strategic Objective 4: Public understanding has increased on trade and corporate globalization, and the detrimental impact of these and other economic policies on workers.

*Healing Justice Goal:* The system of justice has shifted from a paradigm of retribution to one of healing and transformative justice that seeks to restore wholeness to individuals and communities and is informed by: Quaker philosophy, models developed in Indigenous communities and communities of color, and that is informed by prisoners and formerly incarcerated individuals and their families.

Strategic Objective 1: Reliance on retributive justice practices is reduced in seven states by 2012.

Strategic Objective 2: By 2011, healing and transformative justice programs are implemented in two states.

Strategic Objective 3: Increased challenge to racism and inequality within the justice system occurs in a minimum of three communities by 2012.

*Economic Justice Goal:* Government and institutional policies and practices rooted in dignity and human rights that improve social and economic well-being are adopted and maintained.

Strategic Objective 1: One hundred percent cancellation of odious illegitimate debt in 20 African countries.

Strategic Objective 2: Two free trade agreements and one new aspect of the U. S. trade agenda that threaten the economic rights of the vulnerable are substantially modified or defeated.

Strategic Objective 3: Small and large scale alternative trade practices and policy models are advanced.

Strategic Objective 4: Percentage of U.S. budget devoted to human needs has increased.

Strategic Objective 5: Millions more workers receive a living wage or a higher minimum wage for their work.

Strategic Objective 6: Collective action to promote economic justice policies or infrastructure is strengthened in eight states.

Strategic Objective 7: U.S. residents receiving publicly supported healthcare is increased.

Strategic Objective 8: Just policies and practices are adopted by employers and investors.

Resources available from AFSC to assist in this evaluation include:

- The 2003 – 2010 strategic plan.
- Quarterly reports.
- Available plans, monitoring reports and evaluations of specific programs and projects related to each goal.
- Other organizational resources such as the website: [afsc.org](http://afsc.org), organizational charts, newsletters and press releases.
- Access to program staff, Strategic Planning Committee members, and other appropriate stakeholder groups.

The evaluation methodology will be developed by the evaluator(s) in consultation with the Evaluation Review Team. The methodology should use a combination of quantitative and qualitative methods that are most appropriate for addressing the evaluation questions.

Where possible, existing region and unit data and other secondary sources should be used. The methodology developed should note evaluation participants, the geographic scope of the sampling and any cultural conditions that may affect the methodology.

While the evaluation will be designed for the Strategic Planning Committee as its primary audience, the report should be useful as well to other policy makers and program staff.

### **3.0 Scope of Work**

The evaluator(s) will work with the Evaluation Review Team for the Strategic Plan Goals; membership includes members of the Strategic Planning Committee (SPC) and senior management of the Programs Division, as well as the Director for Planning and Evaluation. The project leader is the Director for Planning and Evaluation. An Evaluation Working Group composed of a couple of senior staff members along with related program staff representatives will provide operational guidance and support to the evaluator(s).

A full report on the three goals and the summary will be delivered to the SPC. After SPC review, the full report, as well as an executive summary, will be made available to the Board of Directors and other interested parties within AFSC.

The report will also be used as a basis for organizational learning, including processing specific findings and recommendations in a variety of organizational settings such as:

- Board Program Committee
- Regional Executive Committees
- Programs Leadership Team
- Global Program Planning Group;
- Program staff;
- Goal Leadership staff; and
- Partner organizations, where appropriate.

By March 18, 2011, the evaluator(s) will meet with the Evaluation Review Team to present the evaluation design; an outline and timeline of how the three goal areas will be evaluated; the evaluation matrix or matrices; and a sampling strategy based on strategies developed by the evaluator(s) working with the Evaluation Working Group. Proposals should include an expanded time line with appropriate status reports to the Evaluation Review Team as well as dates for key deliverables. While the exact time line is flexible, a final report must be delivered by September 15, 2011. We encourage proposals to consider separate final reports on individual goal areas that can be completed sooner. Proposals may also include other activities deemed necessary by the evaluator and specified within the work plan.

## 4.0 Proposal Submission Requirements

All proposals must be received by 5:00 pm EDT on Tuesday, February 15, 2011. Proposals received after this date and time will not be given primary consideration. A transmittal letter and proposal should be sent to [mbase@afsc.org](mailto:mbase@afsc.org) as an Adobe PDF. Other formats will not be accepted.

Proposals should be no more than fifteen pages in length and must address the complete scope of work and deliverables, and include the following sections:

### A. Organization/Evaluator Background

State the name of the organization and / or evaluator. If an organization, describe the general nature of its work and specifically name the evaluator that will be conducting the work. Describe the education, skills, and experiences that uniquely qualify the evaluator for this work. Proposals must include three examples of related work completed with contact information for the organizations served.

### B. Statement of Proposed Work

State in succinct terms an understanding of the work to be completed. Describe the methodologies proposed to complete the three goal evaluations and a final report including a timetable for completion of specific tasks, the personnel needed to complete tasks, and expectations for support and assistance from AFSC. Describe the integrated work plan for the three evaluations and note any synergies that are gained from considering all three together as well as any important differences in approach. Complete the matrix (or matrices, if you believe that different approaches are required for each goal area) in Appendix 1 to support the proposed methodology and timetable. Proposals may also include other activities deemed necessary by the evaluator and specified within the work plan.

The evaluator(s) should include consultation with the Evaluation Working Group and Evaluation Review Team throughout the evaluation process. Specific consultations should include a meeting with the Evaluation Review Team early in the process to present the evaluation design; the evaluation matrix or matrices; and a sampling strategy based on strategies developed by the evaluator(s) working with the Evaluation Working Group. Consultations to review milestones, draft reports and the final report should be anticipated, as well.

While the evaluator(s) is expected to work independently, the Evaluation Review Team, the Evaluation Working Group, and, in particular, the project leader, will assist in facilitating access to stakeholders, providing needed documents, and solving problems and concerns that may develop throughout the course of the evaluation. The evaluator(s) is expected to care for general support in the act of carrying out the evaluation. Logistics such as travel and accommodations are the evaluator(s) responsibility and will be

reimbursed by AFSC according to policy, and with prior approval of the Director for Planning and Evaluation.

### **C. Budget and Deliverables**

Provide a detailed budget as well as a description of the specific deliverables that will be submitted, the time line (with dates for completion of individual evaluations), and expected schedule of compensation.

### **D. Additional Information and Comments**

Include any other information deemed important, but not specifically required elsewhere.

## **5.0 Proposal Evaluation Procedures**

The evaluator(s) will be hired by senior management of the AFSC. The project leader will provide direct contract supervision and shall be the Evaluation Review Team contact with the evaluator(s).

The evaluator(s) should demonstrate:

- Experience designing and leading impact evaluations using a logic framework;
- Experience applying qualitative and quantitative evaluation methods where data constraints exist;
- Facilitation and interviewing skills;
- Experience working with U.S. organizations doing social justice work in areas of human migration and mobility, economic justice and/or healing justice.
- Proficiency in English and ability to work with translators.

Criteria for evaluating proposals will include:

- Strength of qualifications
- Understanding of the work to be completed
- Strength of work plan
- Cost
- Time

Evaluators selected for further consideration must be available for a telephone interview on Friday, February 18, 2011.

## **6.0 Inquiries**

Questions that help clarify the work to be completed can be submitted to the Director for Planning and Evaluation at [mbase@afsc.org](mailto:mbase@afsc.org). Telephone calls will not be entertained.

**Appendix 1**

Evaluation Matrix

As referenced on page 6, complete the matrix (or matrices, if you believe that different approaches are required for each goal area) to support your proposed methodology and timetable.

Issues	Key Questions/Line of Investigation	Specific Research Questions/Line of Inquiry	Data Sources	Methods /Tools	Indicators/ Deliverables
Impact and Effectiveness	<p>Assess the impact of each goal’s programmatic efforts to date in relationship to stated objectives and intended results.</p> <p>Discuss, as well, the effectiveness of the combined program work within each goal area, providing a systematic assessment of progress based on data for the stated goal and strategic objectives. (Data already collected should provide much of the basic information).</p>				

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Efficiency of Planning and Implementation	<p>Assess whether resources available are sufficient to achieve program objectives in each goal area.</p> <p>Assess how the additional impact of the significant downsizing of AFSC in 2009 has affected the achievement of the goal and strategic objectives.</p> <p>Assess other program management and support factors that may be affecting program impact.</p>				
Sustainability, Replication and Magnification	<p>Assess the key factors affecting sustainability toward achieving each goal.</p> <p>Assess and make recommendations on the key strategic options to strengthen or improve each goal in the future.</p>				

REV January 25, 2011