

TO: Prospective Bidders

FROM: United Way of South Central Michigan

Contact: Natalie O'Hagan, Senior Director of Strategy and Culture

RE: Request for Proposal (RFP) to provide an evaluation of UWSCMI's small business programming

DATE: December 2, 2024

### **ABOUT UNITED WAY OF SOUTH CENTRAL MICHIGAN**

United Way of South Central Michigan (UWSCMI) gathers the power of three legacy organizations—Capital Area United Way, United Way of the Battle Creek and Kalamazoo Region, and United Way of Jackson County—to mobilize financial and volunteer resources, partners, and voices, creating equitable and lasting change for the most vulnerable people in our communities.

Our vision: Strong, caring communities where every person is valued, thriving, and connected for the common good.

Our path: Our work lifts our local communities by reducing racial and economic disparities; addressing the needs of ALICE (Asset-Limited, Income Constrained, Employed) households in financial stability, education, health, and basic needs; and creating opportunities for every person to reach their full potential.

### **EQUITY, DIVERSITY, AND INCLUSION**

UWSCMI is committed to dismantling systemic inequities that continue to cause harm for Black, Indigenous, and other People of Color (BIPOC), Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) people, women, and people with disabilities. We believe that these communities must be centered in the work we do. We strongly encourage applications from people with these identities or who are members of other marginalized communities. Together, we will continue to build capacity and accountability into our policies, practices, and partnerships.

Full UWSCMI Equity Statement can be read here: <https://unitedforscmi.org/equity-diversity-and-inclusion/>

#### **Summary:**

UWSCMI is seeking proposals from qualified consultants or firms to provide a qualitative and quantitative evaluation of the life of the following small business programs: Kalamazoo Micro-Enterprise Grant Fund (KMEG) and the Kalamazoo Small Business Loan Fund (KSBLF). Only Michigan based firms or consultants need apply.

#### **Scope of Work:**

The consultant will be responsible for leading a comprehensive evaluation process with the primary objective of creating an evaluation document that contains key learnings, highlights, successes, and opportunities for UWSCMI to improve programming and partnerships. The consultant will be expected to provide strategic support through:

1. Conducting a thorough review of the KMEG and KSBLF program investment data.
2. Collaborate with key stakeholders within our organization to understand historical context, challenges, and opportunities for each program.
3. Analyze relevant industry trends and best practices to inform evaluation outcomes.

4. Facilitate a series of community conversations with prior applicants, funding recipients, and community partners to gain a comprehensive understanding of the program's impact.
5. Provide a complete evaluation to UWSCMI at the conclusion of the work that contains a summary of key findings based on investment data, internal stakeholder and external partner and stakeholder conversations, and integration of leading industry best practices to inform future investment and partnership opportunities.

**REPORTING:** Reports to UWSCMI Senior Director of Strategy and Culture with support from UWSCMI's Executive Impact and Equity Officer and UWSCMI's Director of Community Impact – Investments and Community Partnerships

**Proposal Submission Guidelines:**

1. **Executive Summary:** A brief overview of your firm, qualifications, and relevant experience in evaluation practices and methodology. Industry-specific experience (i.e. small business, entrepreneurship, and/or economic development) is strongly desired.
2. **Methodology:** An outline of the approach you would take to complete the described evaluation, including facilitation practices and approach and research methodology. Please include how your practices are aligned with UWSCMI's values and focus on equity, diversity, and inclusion. For more information on UWSCMI's vision, mission, and values, please review our website [here](#).
3. **Relevant Experience:** Details of previous projects that demonstrate your expertise in supporting projects of this scope and size and in relevant subject matter.
4. **Team Expertise:** A summary of the qualifications and experience of the individuals who will be directly involved in the project.
5. **Timeline:** A proposed timeline for completing the evaluation, including key milestones and deadlines.
6. **Budget:** A detailed budget that includes all costs associated with the project, including consultant fees, travel, accommodation, community conversation costs, and any other relevant expenses. **(Not to exceed \$20,000)**
7. **References:** Contact information for at least three professional references from clients who can speak to your experience in evaluation and facilitation.

**Qualified entities shall provide a proposal to UWSCMI via email to [smallbusiness@uwscmi.org](mailto:smallbusiness@uwscmi.org) with the above materials by January 3, 2025 at 5PM EST. Questions about the RFP should be directed to Natalie O'Hagan, Senior Director of Strategy and Culture through the above mentioned e-mail account.**