

Request for Proposals

Systems Baseline Report for Laudes Foundation's Theory of Change

Laudes Foundation seeks a team or organisation for undertaking systems baseline for Laudes Foundation's newly developed Theory of Change. **Complete proposals must be submitted by 5 March 2021.** More details are given below.

I. Introduction

[Laudes Foundation](#) is an independent foundation and part of the Brenninkmeijer family enterprise. Launched in 2020, we build on the six generations of entrepreneurship and philanthropy and stand next to the COFRA businesses and the family's other private philanthropic activities, including Porticus, Good Energies Foundation and Argidius Foundation. Although independent from them, we learn from their past and present experiences. In particular, Laudes Foundation will advance the industry-changing work of C&A Foundation.

Laudes Foundation is commissioning a systems baseline study to document the present entry-conditions into the systems of interest and aligned to the outcomes in the foundation's Theory of Change. The overarching objective of the baselining is:

To provide an assessment of the current status of the systems Laudes Foundation wants to influence in relation to the outcomes and impacts included in the foundation's Theory of Change.

In doing so, the baseline assessment will provide the foundation a snap-shot of the present conditions which will inform the depth and pace of change needed over the subsequent strategic period from 2021 to the end of 2025. **The study will be conducted from March through July 2021.**

The request for proposals presents a brief description of the theory of change; scope; objectives and key questions; proposed methodology; stakeholder involvement; roles and responsibilities; systems baseline process; deliverables; audience and dissemination; consultant qualifications and projected level of effort.

The systems baseline report is required to be completed and submitted to Laudes Foundation by 31 July 2021.

II. Laudes Foundation Theory Of Change

Laudes Foundation's 2030 ambition statement is:

‘An inclusive economy where ideas and incentives have shifted power to ensure that business and markets mitigate climate change and eliminate inequity’.

Within today’s context, the foundation is responding to the convergence of two global crises – inequality and climate breakdown, resulting from current global economic disfunction. The foundation’s vision is to enable and contribute to an economic system where ‘global markets that value all people and respect nature’. The mission is to support brave action to inspire and challenge industry to harness its power for good. The foundation primary mode of operating is to intervene and change industry behaviour.

The foundation strategy framework addresses both short-term and long-term actions needed to tackle climate and inequality crises. In doing so, it is important to understand the current system’s status, dynamics and context. The 2025 outcomes (see annex A) are the expected ‘half-time results’ for four groups of actors – (i) policymakers, (ii) financial actors, (iii) business, and (iv) workers, producers and communities – within the context of three industries: (a) finance and capital markets; (b) fashion; and (c) built environment.

Additional details will be provided to the consultants by the foundation.

III. Scope

The systems baseline will document the current conditions of the system relative to the outcomes and 2030 impacts listed in Laudes’ Theory of Change. The systems baseline report will be used to inform strategic and operational planning and the annual learning / adaptation process and will serve as a reference point to monitor and evaluate systems change across the programmes.

The systems baseline will provide an expert assessment triangulated with evidence from established sources to rating of current conditions in foundation’s industries and geographical scope for:

- the 2025 outcomes and
- the 2025 impacts.

IV. Guiding questions

- What is the current state of the system on the various outcomes and impacts represented in Laudes Foundation’s Theory of Change?¹
 - What are the current ‘pockets’ where the system is more advanced, that will aid progress towards Laudes’ outcomes?
 - What are current ‘pockets of concern’ within the system that will inhibit progress towards Laudes’ outcomes?

¹ In doing so, rating ‘how far the system is away from achieving the 2025 outcomes and trajectories towards 2030 impacts.

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- How adequate and valid is the evidence available to track and rate progress towards the 2025 outcomes and the 2030 impacts?
 - What are existing gaps in the literature and/or data that need to be addressed to improve the validity and robustness of the ratings?

The questions will be further developed and sharpened in a design workshop with foundation staff.

V. Methodology

Design and Method: The baseline study is expected to draw on a range of appropriate qualitative, quantitative and evaluative methods, including a real-time quasi-Delphi assessment and a review of key evidence / literature relating to climate and inequality, focusing, as much as possible on the geographical scope of the foundation.

Sampling: The consultant team or organisation will be expected to propose appropriate experts for the assessment with the assistance of foundation staff.

Documentary Review: Select 'expert' literature on climate and inequality will be reviewed. It will be gathered, in part, through recommendations from foundation staff and external experts (polled sample).

Rating system: The consultant team will employ Laudes Foundation's rubrics system to rate the current conditions and how far away the foundation 2025 outcomes are from being achieved. The ratings will be applied by the evaluation team in consultation with the Effective Philanthropy team.

VI. Stakeholder Involvement

Stakeholder involvement is critical to the successful execution of the systems baseline. The consultancy is expected to employ participatory and collaborative approaches for meaningful involvement of foundation staff and external experts in implementing the study and reaching evaluative conclusions. The consultant team should ensure sufficiently diverse perspectives and expertise in the baseline process.

The draft baseline report will be discussed in a workshop and also circulated to relevant foundation staff and management for review and comments prior to finalisation.

VII. Roles and Responsibilities

Director of Effective Philanthropy / Senior Evaluation Manager (joint-Task Managers) are responsible for:

- Coordination of the selection of the consultant team;
- Overall responsibility and accountability for management and delivery of the baseline assessment up to and including approval of the final report;

- Facilitation on the systems baseline process including access to foundation and other relevant data, all documents, and access to stakeholders/actors (internal and external) as appropriate;
- Technical guidance for the consultants throughout the systems baseline up to and including participation in data collection;
- Coordination between the consultant team and foundation programme teams.

Programme Directors are responsible for:

- Technical guidance for the consultants throughout the systems baseline up to and including advice on selection of experts (to be polled / interviews);
- Participation in key systems baseline related meetings (kick off meeting, inception report meeting and draft findings meeting etc.)
- Reviewing and commenting on drafts of the report;

The consultant team are responsible for:

- Conducting all necessary literature review, expert polling and interviews;
- Day-to-day management of the systems baseline;
- Regular formal and informal reporting to Effective Philanthropy and Programme Directors;
- Production of deliverables (inception, and draft and final systems baseline report) in accordance with the RFP and contractual arrangements.

The consultants will report to, Effective Philanthropy on all issues related to the systems baseline, contracts, fees and expenses, and deliverables and commenting / responses processes.

VIII. Systems Baseline Process

The consultants will prepare an **inception report and work-plan** that will operationalise the Request for Proposal and outline the use of rubrics rating system in the systems baseline. The inception report will be based on initial documentary review and preliminary interviews and a workshop (virtual) with foundation staff.

The inception report and work-plan will address the following elements: expectations of the systems baseline; roles and responsibilities within the consulting team; any refinements and elaboration to questions; literature review; methods – qualitative and quantitative data collection, including possible constraints; outline of the final report and a matrix linking questions – methods – evidence sources and rubrics.

The inception report and work-plan will be approved by the Director of Effective Philanthropy and Programme Directors and act as an agreement between the consultants and the foundation on how the systems baseline is to be conducted.

The consultants will prepare the **draft and final systems baseline reports** that clearly present well-evidenced conclusions, based on foundation’s rubrics, as well as describe the methodology and key lessons and / or strategic implications.

The main activities and timetable for this consultancy is set out below:

Systems Baseline Process	Deadline	Responsibility
Submission date of proposals	5 March 2021	Consultant team
Selection of Consultancy	12 March 2021	Effective Philanthropy and Programme Teams
Design Workshop (to be held virtually)	24 March 2021	Consultant Team, Effective Philanthropy, and Programme Team
Inception report	17 April 2021	Consultant Team
Draft report for comment	30 June 2021	Consultant Team
Final report	31 July 2021	Consultant Team
Dissemination of the systems baseline report	August 2021 onwards	Effective Philanthropy and Programme Team(s)

IX. Deliverables

The systems baseline exercise requires the external consulting team to submit the following deliverables:

- Design workshop
- Inception report
- Draft Systems Baseline Report
- Sensemaking meeting to discuss findings (virtual meeting with relevant Laudes Foundation staff)
- Final Systems Baseline Report, with a three-page executive summary

X. Audience and Dissemination

Main audiences for the systems baseline report will be foundation’s staff and governors. The systems baseline report will be published by the foundation and disseminated through its website and social media as appropriate.

Learning products will be developed after the completion of the systems baseline report as appropriate and necessary.

XI. Consultant Requirements and Level of Effort

Applicants will be a group of individual consultants with a designated team lead, or consulting companies with relevant expertise in conducting baselines and / or delphi assessments.

Applicants must have at a minimum the following qualifications:

- Experience in conducting baseline and / or Delphi assessments to a high standard in Europe and globally;
- Knowledge of fashion, finance and built environment industries is desirable but not a prerequisite;
- Knowledge of systems change and transformative change;
- Additional experience is expected in:
 - Evidence review;
 - Rubrics methodology and evaluative reasoning (i.e., drawing explicitly evaluative conclusions supported by evidence and reasoning, combined in a systematic and transparent way);
 - Mixed methods, including the synthesis of multiple types and sources of evidence to draw clear conclusions
- Strong facilitation skills (virtual and in-person) and proven ability to lead participatory processes;
- Fluency in English (spoken and written) is essential; and
- No conflict of interest with Laudes foundation

The expected level of effort for the evaluation is approximately 60 - 80 working days. This is an estimate – the level of effort proposed must be aligned with the proposed approach.

Please submit the following to Lee Alexander Risby, Director of Effective Philanthropy (l.risby@laudesfoundation.org) and Joao Martinho, Evaluation Manager (j.martinho@laudesfoundation.org)

A. Technical Proposal

- A narrative proposal (no more than 5 - 6 pages excluding annexes) and including the following sections:
 - a) Systems Baseline methodology: Describe your overall approach and systems change baseline methodology including use of the Real-Time Delphi technique.
 - b) Relevant Experience: Provide details of projects of similar scope, complexity and nature you or your organisation have worked on previously. Please include any experience with systems change in climate and/or inequality.
 - c) Specific Expertise: Describe your level of knowledge and expertise conducting systems change assessments or baseline studies, including the use of evaluative reasoning, rubrics methodology and the Real-Time Delphi technique.
 - d) Key Personnel and Staffing: Describe the key personnel. Include CVs (no more than 2 pages each and attached as annex) of key personnel who would be part of the proposed plan.
 - e) Timeline: Include a detailed timeline of key activities.
 - f) Sample reports: Two sample reports authored by the team lead (will be treated as confidential and used for purposes of selection)

B. Financial proposal

- The financial proposal should include a line-item budget and a budget narrative. The cost estimates used to prepare the budget should be presented in Euros.

Annex A: Laudés Foundation 2030 Impacts and 2025 Outcomes:

2030 Impact ("The Reality We Want to See By 2030")	2025 Outcome A (Climate) ("How Each Actor Helps Create This Reality")	2025 Outcome B (Equality) ("How Each Actor Helps Create This Reality")
<p>1. Bold policy and regulatory frameworks have created the foundation for a new economy grounded in climate-positive practices, inclusion and equality.</p>	<p>1a. Policy-makers reform, implement, enforce and protect critical laws and policies that require climate-positive practices.</p>	<p>1b. Policy-makers reform, implement, enforce and protect critical laws and policies that require equity and inclusion.</p>
<p>2. An accountable financial sector that enables, conditions and rewards climate-positive practices, inclusion and equality.</p>	<p>2a. Financial sector actors use their influence, policies, practices and valuation methodologies towards ensuring climate-positive practices.</p>	<p>2b. Financial sector actors use their influence, policies, practices and valuation methodologies towards ensuring equity and inclusion.</p>
<p>3. Responsible businesses and industries are climate-positive and ensure inclusion and equality for workers, producers and communities.</p>	<p>3a. Businesses promote and implement bold, climate-positive policies, models and practices.</p>	<p>3b. Businesses promote and implement bold policies, models and practices that contribute to equity and inclusion.</p>
<p>4. Active, organised workers, producers and communities exercise power to secure climate-positive practices, inclusion and equality.</p>	<p>4a. Workers, producers, and communities claim rights and build power to organise and advocate for climate-positive policies and practices.</p>	<p>4b. Workers, producers and communities claim rights and build power to organise and advocate for equity and inclusion.</p>