

# Steelcase<sup>®</sup> Foundation

Executive Summary of  
Research and Evaluation Needs for the  
Investment in Families (IIF) Initiative

Request for Proposals (RFP)

August 2023



## A. Steelcase Foundation Context

Vision: We acknowledge the inherent brilliance of community and work to ensure ours is one in which all can participate, grow, and thrive.

Mission: We collaborate and connect resources with people and movements that advance, advocate for, and accelerate us toward a more just and liberated community.

Our focus is to increase access to quality public education and cultivate communities that create conditions for children, birth through young adult, to thrive through:

- Accessible, quality learning experiences;
- Multi-generational support, advocacy, and engagement;
- Removal of barriers and systemic impediments; and,
- Arts and culture opportunities that enhance young people's learning, engagement, and belonging.

### Guiding Principles:

- *People* – We believe our humanity, fate, and liberation are interconnected. We know that talent lives in community and that solutions are often among the people most impacted by unjust systems.
- *Partnerships* – We build authentic partnerships while addressing power dynamics through deep listening, co-creation, and mutual accountability to advance positive change.
- *Diversity & Inclusion* – We believe that organizations operate best when there is clear representation at all levels from the communities within which they work and when diverse voices are sought, heard, elevated, and honored.
- *Integrity* – We honor our word and treat all people with respect, dignity, and fairness.
- *Humility* – We invest and partner with gratitude and appreciation and seek to lift up and center community brilliance.
- *Innovation* – We encourage risk-taking, courageous leadership, actions rooted in the indigenous wisdom of the community, and new approaches to achieve long-term impact and systemic change.
- *Learning* – The issues we face are complex and intersectional. Adaptive learning, continuous improvement, and mutual accountability helps move us toward meaningful results.

### Systemic Change + Movement Building:

The Steelcase Foundation has three community investment strategies based on best and most innovative approaches to philanthropic efforts gleaned from stakeholder interviews and experience. They advance the Steelcase Foundation's mission and are supported by the above guiding principles. The Investment in Families (IIF) Initiative is the leading component of the Systemic Change + Movement Building (SC+MB) community investment strategy. This strategy focuses on partnerships and Foundation-led initiatives that directly leverage the Foundation's power to influence, inform philanthropy and policy, and use expertise to drive and support larger-scale social change.

## B. Investment in Families (IIF) Initiative Abstract

The Investment in Families (IIF) Initiative is a ten-year investment in a cohort of 30 Black and Latina mothers in Kent County, Michigan with the dual goals of:

- Supporting their individual and collective well-being, and

- Changing the behavior of systems and institutions that continue to enact harm upon them and their communities.

This is a shift from historic program delivery models in that we are intentionally decentering the interventions and instead centering the agency, well-being, and reduction of the “cognitive load” of participants. We hypothesize that by creating additional “room to breathe,” participants will meet or exceed their goals, increase their self-defined well-being and will support identifying the appropriate change levers to focus our internal growth, philanthropy, influence, and advocacy work.

### C. IIF Guiding Frameworks & Core Components

The frameworks guiding the design and implementation of this initiative currently, including research and evaluation, are:

1. *Two-Generation (2Gen)* approach and components build family well-being by intentionally and simultaneously working with children and the adults in their lives together. The [2Gen](#) approaches center the whole family to create a legacy of educational success and economic prosperity that passes from one generation to the next.
2. *Harm Reduction* is a set of practical strategies and ideas aimed at reducing negative consequences typically associated with drug use. While this work is not focused on people who use drugs, many of the principles outlined by the [National Harm Reduction Coalition](#) align with our work to help transform systems that perpetuate harm. Thus, it is critical that we both reduce the harm people experience in the present and support the work of repairing previous harms.
3. *Productive Tension Model* frames tension as an emotional “signal” that there is work to be done. It then maps two paralleled tracks of creation to imagine the future, and repair to attend to past and present experiences. We chose this design model to ensure harm reduction and advocacy efforts rely on the experience and testimony of the people most regularly harmed by systems in addition to technical/professional fixes.
4. *Scarcity Mindset* research as outlined in the book, *Scarcity: The Science of Having Less and How It Defines Our Lives*, by Sendhil Mullainathan and Eldar Shafir who argue that the “cognitive load” carried by those living in poverty has very real implications on decision-making. That families are making the decisions that make sense, given the context in which they are making them. Scarcity of resources reduces cognitive capacity and executive control of choices, thus increased resources will provide cognitive “room to breathe” or slack to have more capacity and control of choices.
5. *Narrative Change* to push against what Tressie McMillan Cottom writes in her book, *Thick: And Other Essays*, “structural assumptions of incompetence” surrounding Black women. While application to the IFF initiative and the Black and Latina mother cohort is not fully fleshed out, we recognize the need to identify clear narrative demands (i.e.. Black and Latina mothers are worthy of trust and respect) and narrative targets that will shift away from discourse and practices that reproduce structural assumptions of incompetence.
6. Lessons from the book, *Black Feminist Thought*, by Patricia Hill Collins, will be applied to the IIF program design, narrative change strategy and evaluation. Collins writes, “The methods used to validate knowledge claims must also be acceptable to the group controlling the knowledge validation process. Individual African-American women’s

narratives about being single mothers are often rendered invisible in quantitative research methodologies that erase individuality in favor of providing patterns of welfare abuse. Thus, one important issue facing Black women intellectuals is the question of what constitutes adequate justification that a given knowledge can, such as fact or theory, is true.” There will be 30 experts (mothers) in the IIF cohort that know what is true, what works and will learn and co-design the IIF experience alongside the Foundation’s Director for Family-Centered Philanthropy, DHHS, Program staff, the research and evaluation partner, and systems leaders.

7. *The Bridge to Self-Sufficiency Model* developed and used by Empath for their Mobility Mentoring program will be used for mothers to establish and track movement on their goals. “The Bridge” is backed by emerging brain science and will most likely be used by IIF to help families achieve long-term economic mobility. The Bridge helps families plan, reach, and sustain their personal goals in five essential areas: family stability, well-being, education and training, financial management, and employment and career management. This model takes a comprehensive approach, because difficulties in one part of someone’s life can create difficulties in another. Fortunately, the opposite holds true, as well. Success in one part of someone’s life can reinforce success in another.

Additional core program design and delivery components were established through research and engagement with local Black and Latina mothers matching the cohort profile. These core components of program design include, but are not limited to:

1. Well-being Pillars (identified by mothers)
  - Material Resources:
    - *Guaranteed Basic Income (GBI)* to help cover costs such as housing, food, transportation, education & training, and childcare. Each participant will receive up to \$1,000 per month throughout the duration of the 10-year initiative.
    - *Health Savings Account* to help cover healthcare costs and reduce negative health outcomes.
    - *Child Savings Account* to create long-term savings account and economic mobility.
  - Social Capital:
    - *Cohort* of families to journey together.
    - *Relationships* with coach, the Michigan Department of Health and Human Services (MDHHS) case worker, therapist, and other support systems.
    - Mutually supportive relationships.
  - Individual and Family Well-Being:
    - Coach available to assist in setting goals, offer encouragement and support the navigation of systems.
    - Therapist using a trauma-informed family systems approach to support families.
    - MDHHS case worker to help navigate benefits and the benefits cliff.
2. Interventions/IIF program offerings need to be consistent and predictable to combat the cognitive load that comes with uncertainty.
3. Create space for mothers to experience rest, respite, joy and to play and be fully present with children.
4. Black and Latina mothers are worthy of respect and trust.

5. Program design and offerings support the mothers' self-determination, choice and agency.
6. Center felt difference for mothers and families and decenter "attainment" of goals.

## D. Basic Cohort Profile

Black and Latina mothers who:

- Live in Kent County, Michigan.
- Have one or more children under the age of 12.
- Are currently employed.
- At the ALICE (Asset Limited Income Constrained but Employed) threshold, earning between \$30,000 and \$45,000 per year.
- Potentially face the threat of a public benefits cliff (when an increase income would result in a loss in assistance that outweighs the additional earnings).
- Have a high school diploma or GED.

## E. Foundational Research & Evaluation

The Steelcase Foundation seeks a research & evaluation (R&E) partner to design and implement a mixed-methods evaluation strategy for this longitudinal pilot program that is grounded in principles of equity, cultural responsiveness & relevance, and participatory evaluation, and centers the "felt difference" and well-being of participants.

While Guaranteed Basic Income (GBI) is a component of this initiative, this is not a GBI pilot. This is a more comprehensive strategy that incorporates the framework and components listed in Section C of this document, "IIF Guiding Frameworks & Core Components."

The primary focus of the R&E partner's work centers on the change in the individual's (mother's) and family's well-being, agency and the "felt difference" of the mothers. The R&E partner is asked to select metrics and design measurement of potential primary data points, such as:

- Change in sense of agency and self-efficacy.
  - Impact of choice and agency approach for mothers to select interventions vs. prescribed metrics of social success.
- Change in cognitive load/bandwidth to consider and make choices about their future.
- Change in healthy and rewarding relationships.
- Impact of the three Well-Being Pillars (Having Material Resources, Social Capital, and Individual & Family Well-Being).
  - Change in social capital, and understanding of benefits of leveraging it to fulfill personal and professional needs.
  - Change in time and quality of time spent with child(ren).
- Change in overall economic self-sufficiency as measured by the Bridge to Self-Sufficiency.
- Change in anxiety levels: Generalized Anxiety Disorder 7-item (GAD-7) is a possible measurement tool.
- Impact of this comprehensive and long-term investment in each of the six Two-Generation (2Gen) components have on the individual (mother) and family.
- Qualitative and quantitative data on impact on individual and family.
- Additional research questions to consider:
  - What impact of creating respectful, reciprocal, culturally responsive, and meaningful relationships between families, community partners, researchers and philanthropy have on all family members?

- How might families identify/define success?

The secondary focus areas of research and evaluation is around building a case and advocacy campaign for systemic change among the philanthropic sector and other systems with the goal to have systemic change that reduces or eliminates harm on these families and their communities and constrain their choice and agency. The R&E partner is asked to strategize on the selection and measurement of potential secondary data points, such as:

- Track investment into the IIF effort and per family, quantify the return on investment, and compare to the financial costs and savings in the community at large.
  - Determine what types of savings this type of investment could contribute to long-term in public assistance, health care costs, future earnings, and subsequent increase in taxes, and more.
- Capture qualitative and quantitative data for IIF staff to incorporate as part of the work around advocacy, policy change and replicating the model, fully or in-part, across systems. The Foundation plans to use the Midwest Academy Strategy Chart to build specific advocacy campaigns that correspond to the system behaviors sought.
- Participant wage growth and change in financial security.
- Participants' access and utilization of IIF program offerings and of additional resources needed to support their career, education, and life goals.
- Additional research questions:
  - How does Guaranteed Basic Income impact public benefits?
  - Does having a Health Savings Account (HSA) increase access to health care services and/or overall health?
  - Based on cohort experience and needs, what are the top behavior changes needed of systems within our spheres of influence: 1) nonprofit program delivery, 2) philanthropic funding behaviors, 3) legislative decision-makers and policy creation?
  - How might we leverage learning to positively change the discourse surrounding Black and Latina mothers?
  - What factors affect families' ability to succeed?
  - What are key change levers?

Children of the mothers in the cohort are a big consideration when evaluating IIF initiative impact. The Foundation is interested in discussing the best way to assess their “felt difference” of the primary R&E strategy, as well as their overall outcomes, such as increase in academics, feelings of safety and connectedness with family and social networks, etc.

The data points listed above are examples, and not a directive. The R&E partner will propose metrics, create or identify data collection tools/strategies, and platform to store and analyze:

- Administrative data: i.e. Participant contact and demographic information, household information, attendance and program data that can be collected by program staff.
- Evaluation surveys: i.e. Participant and family impact surveys, program feedback surveys pre and post surveys/assessments that can be administered by program staff and/or coded secondary data gathered by mental health provider (if authorized).
- Qualitative evaluation data: i.e. Gathered by R&E partner via focus groups, interviews, videos, voice memos, etc.
- Research and quantitative analysis data: i.e. Quantifying long-term cost savings to community, wage growth, change in financial security and future earning potential,

The R&E plan should include providing periodic data briefs and presentations to the IIF team for reflection and deepening the preliminary analysis of the data. The R&E partner should have

data visualization capacity to create charts and graphs that can communicate the findings to different types of audiences.

Regarding participatory methods, the R&E partner will collaborate with the IIF team to co-design metrics and research questions, survey and interview instruments and other aspects of the design and implementation. We seek a similar approach with the cohort participants and ask that the R&E partner include opportunities for the interested participants to get involved with R&E if they wish. Examples of options:

- Join an evaluation working group for the IIF initiative.
- Help develop research questions.
- Help test instruments.
- Collect data – send out surveys or lead focus groups.
- Help develop coding frameworks.
- Help identify interesting learnings for reports.

## F. Estimated Timeline

Our goal is to launch the program with the first gathering of the cohort by March 2024 and between now and then, the program and processes – including evaluation plan – needs to be as complete as it can be knowing there will be built in flexibility to provide the mothers an opportunity to finalize and adapt as the initiative unfolds.

Securing the R&E partner, one or more, early in the planning process is critically important as the processes, paperwork and programming for the initial year will be based on the evaluation plan. Ideally, the Foundation seeks to contract with one R&E partner. Given the breadth of the IIF Initiative and R&E needs, we recognize that the R&E partner may need to subcontract with additional R&E experts.

Below is an estimated timeline. We acknowledge that organizations have internal processes and timelines for such research and evaluation. We offer this information as a guide that is moderately flexible.

### IIF Initiative Years

Year 0 (2023): Planning Year	Year 4 (2027)	Year 8 (2031)
Year 1 (2024)	Year 5 (2028): Mid- Project Milestone	Year 9 (2032)
Year 2 (2025)	Year 6 (2029)	Year 10 (2033)
Year 3 (2026)	Year 7 (2030)	Year 11 (2034): Post initiative

<b>Year 0 (2023 – Planning)</b>	<b>R&amp;E Related Activities &amp; Milestones</b>
August	<ul style="list-style-type: none"> <li>• Research &amp; Evaluation (R&amp;E) RFP Released</li> <li>• Conversations with perspective R&amp;E partners</li> <li>• RFP response proposals accepted</li> </ul>
September	<ul style="list-style-type: none"> <li>• Conversations with perspective R&amp;E partners</li> <li>• RFP response proposals accepted</li> </ul>
October	<ul style="list-style-type: none"> <li>• RFP response proposals accepted through 10/6/23 or until partner(s) selected</li> <li>• Meet with selected R&amp;E partner(s) to finalize scope and contract</li> </ul>
November	<ul style="list-style-type: none"> <li>• Research, adapt and finalize data collection tools and methods for Year 1 with a long-term strategy for the subsequent years.</li> </ul>

	<ul style="list-style-type: none"> <li>Meet with Foundation as needed by either party to finalize data collection tools/methods.</li> </ul>
December	<ul style="list-style-type: none"> <li>Research, adapt and finalize data collection tools and methods for Year 1 with a long-term strategy for the subsequent years.</li> <li>Meet with Foundation as needed by either party to finalize data collection tools/methods.</li> <li>Finalize cohort sign up process and eligibility criteria that aligns to agreed upon R&amp;E strategy</li> </ul>
<b>Q1 of Year 1 (2024)</b>	<b>Activities &amp; Milestones</b>
January	<ul style="list-style-type: none"> <li>Outreach to eligible mothers through local community partners.</li> <li>Cohort “applications” or commitment/interest forms accepted*</li> </ul>
February	<ul style="list-style-type: none"> <li>Cohort participants selected and invited to the initial 1:1 intake meeting.</li> <li>1:1 intake meetings with participants* and gather initial administrative data and pre-survey evaluation data.</li> </ul>
March	<ul style="list-style-type: none"> <li>Finish 1:1 intake meetings with participants and gathering of pre-survey evaluation data.</li> <li>First Cohort gathering</li> <li>1:1 meetings with participants to establish goals</li> </ul>
April	<ul style="list-style-type: none"> <li>Co-Create with cohort and involve cohort on committees ranging for R&amp;E, IIF Advisory Team, etc.</li> </ul>

\*The application and intake process is to be determined. The process will most likely include some written sign up/interest paperwork to determine eligibility and commitment to the 10-year program and a 1:1 meeting with the Program Coordinator to confirm eligibility and understanding of IIF Initiative components.

**G. Contact Information and Next Steps**

Potential research & evaluation (R&E) partners are encouraged and invited to explore this opportunity further via virtual or in-person meeting with the Director of Family-Centered Philanthropy with the Steelcase Foundation who is the organizational lead on this initiative.

Interested parties should reach out to Stacy Stout, Director of Family-Centered Philanthropy, at [sstout@steelcase.com](mailto:ss Stout@steelcase.com) to schedule a time to connect in August or early September.

Prospective R&E partners will then submit a preliminary proposal with evaluation plan, proposed metrics and data collection tools/methods, timeline, budget, and qualifications of the main R&E team on this project (primary and sub-contract R&E team). The proposals are due by October 6, 2023 via email to [sstout@steelcase.com](mailto:ss Stout@steelcase.com) with the email subject heading: R&E Proposal.

Potential R&E partners are welcome to submit a proposal to address all or a portion of R&E needs, and/or can sub-contract with another entity to cover all the R&E needs for this project. The initial contract shall not exceed 5 years and is eligible for renewable based on performance and status and R&E needs of the IIF initiative at that time.

###