



REQUEST FOR PROPOSALS

Evaluation Services Delivered to the City of Philadelphia for “Philly Joy Bank”

Issued by:

The Philadelphia City Fund
On behalf of The City of Philadelphia, Department of Public Health

Questions about this RFP should be submitted to cityfund@phila.gov and Yuan.He@phila.gov by June 30, 2023 at 11:59pm EST. Answers to questions will be posted online by July 5, 2023.

Proposals must be received no later than July 10, 2023 Philadelphia, PA, 11:59pm EST. A pdf version of the proposal must be emailed to: cityfund@phila.gov and Yuan.He@phila.gov.

SECTION I – INTRODUCTION

A. Statement of Purpose

The Philadelphia City Fund (“Fund”) and the Philadelphia Department of Public Health (“PDPH”) seek an evaluation partner for the Philly Joy Bank, a guaranteed income pilot for 250 pregnant and postpartum people in Philadelphia. The Philly Joy Bank will provide \$1000 of monthly no-strings-attached cash to participants throughout pregnancy and through 12 months postpartum, with the goal of improving financial stability for participants and reducing infant prematurity. This RFP is for an evaluation partner who will work closely with the Philly Joy Bank steering committee to design the pilot and develop an evaluation plan.

B. Department Overview

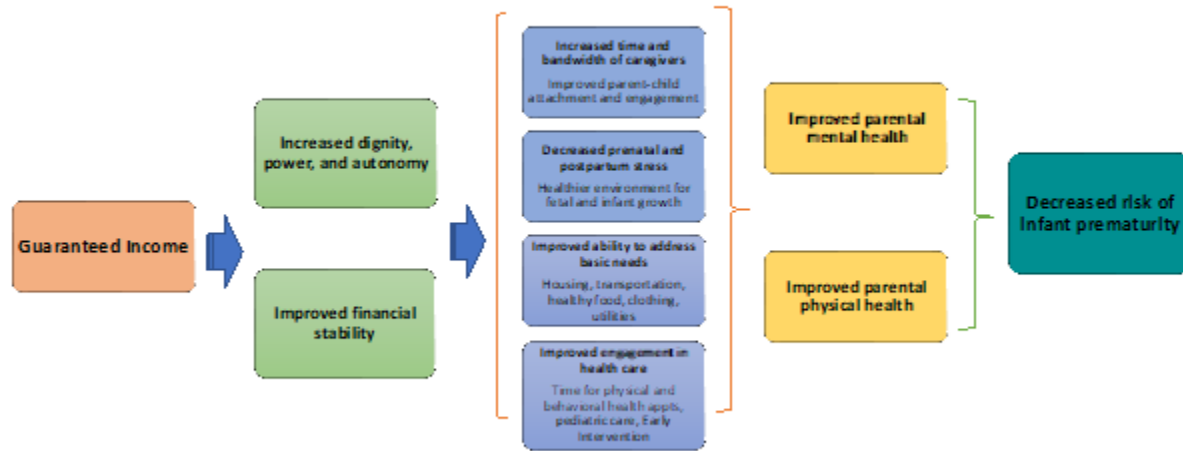
The Philadelphia City Fund works in close partnership with the City of Philadelphia (“City”) and private sector partners to develop and run initiatives that reflect City priorities and seek to improve the quality of life for all Philadelphians. The Fund will serve as the fiscal administrator for this opportunity, and will hold the contract awarded to the winning applicant, on behalf of PDPH. The Philadelphia Community Action Network (“CAN”) is leading and implementing the Philly Joy Bank, with the PDPH Division of Maternal, Child, and Family Health (“MCFH”) serving as the backbone. MCFH will serve as the project manager for this effort on behalf of the Fund, and is responsible for initiatives to improve the lives of childbearing people and help every child get a healthy start in life.

C. Project Background

The Philly Joy Bank is co-led and co-designed by the CAN Holistic Mental Health group, which is a diverse group comprising of Lived Experience Experts (people with lived experience as a birthing person or parent of color) and community-based organizations that work together to improve mental health of birthing people with the goal of reducing racial disparities in infant prematurity and mortality. Through the Perinatal Periods of Risk (PPOR) process, the CAN Holistic Mental Health group found that financial instability is a major source of stress during pregnancy, and that there are large racial and socioeconomic disparities in infant prematurity and mortality. In order to reduce stress, improve financial stability, and support birthing parents in addressing social and structural determinants of health, the CAN Holistic Mental Health group decided to launch the Philly Joy Bank, which will provide guaranteed income of \$1000/month throughout pregnancy and 1 year postpartum, and will also offer voluntary support services including benefits counseling, financial coaching, and programs through the Philly Loves Families website (e.g. doulas, home visiting, lactation support, and other pregnancy-centered supports). In order to select for pregnant people at risk for infant prematurity, the Philly Joy Bank will recruit 250 participants based on the following eligibility criteria: 1) currently pregnant; 2) living in neighborhoods of Cobbs Creek, Strawberry Mansion, or Nicetown-Tioga (the 3 neighborhoods with highest rate of very low birth weight, a proxy for prematurity); and 3) individual income below \$100,000. The Philly Joy Bank will be one of 3 known pregnancy guaranteed income pilots in the United States, joining the Abundant Birth Project in California and the Hummingbird Pilot in Seattle, Washington. An evaluation will be conducted to assess feasibility and acceptability of guaranteed income for pregnant and postpartum people, as well as impacts of the program on participants’ ability to address basic needs, physical and health outcomes, relational health and attachment with their

infant, parenting and caregiving stress, wealth generation, and overall well-being (see draft conceptual model below).

Philly Joy Bank Conceptual Model



D. General Disclaimer

This RFP does not commit the Fund or the City of Philadelphia to award a contract. This RFP and the process it describes are proprietary to the Fund and the City and are for the sole and exclusive benefit of the Fund/City. No other party, including any Applicant, is intended to be granted any rights hereunder. Any response, including written documents and verbal communication, by any Applicant to this RFP, shall become the property of the Fund/City and may be subject to public disclosure by the Fund/City, or any authorized agent of the Fund/City.

SECTION II – PROPOSED SERVICES

A. Scope of Work

PDPH’s objective for this project is to provide 250 Philly Joy Bank participants with monthly guaranteed income throughout pregnancy and postpartum, and to demonstrate positive impacts on the parent-infant dyad that may advance policies that use guaranteed income as a lever to improve birth equity. We seek an evaluation partner with experience in community-based participatory research, content expertise around maternal/child health and/or reproductive justice, and methodological expertise in both quantitative and qualitative methods. We expect this partner to work with the implementing team to conduct an evaluation that will systematically gather data about the experiences of participants and their families, share findings with the implementing team and participants along the way, help elevate the stories of how guaranteed income impacts families, and contribute evidence that advances the broader guaranteed income movement, especially as it relates to the perinatal population. The proposed evaluation plan should assess feasibility and acceptability of guaranteed income for pregnant and postpartum people, as well as impacts of the program on participants’ ability to address basic needs, physical and health outcomes, relational health and attachment with their infant, parenting and caregiving stress, wealth generation, and overall well-being (see draft conceptual model above).

In the design phase, the evaluation partner will work together with the implementing team to inform critical choices in the pilot design, including participant recruitment and enrollment processes, and to finalize an evaluation plan that reflects a data collection and analysis process that is informed by the knowledge, lived, and professional expertise of the Philly Joy Bank Steering Committee and community members.

We anticipate that the evaluation plan will involve a mixed methods approach to elicit qualitative data from participants and quantitative data regarding maternal and child health outcomes, financial security/wealth generation, and other intermediate outcomes determined to be impactful for reducing infant prematurity and promoting early childhood development. While the specific scope of the evaluation will be informed and finalized in collaboration with the implementing team and funders of the Philly Joy Bank, we seek an evaluation partner whose practices are grounded in research justice, with thoughtful and sensitive approaches to working with community members, gathering and using community data, and who would be willing and able to train and support community researchers who are an integrated part of the evaluation team. We also welcome expertise in creative and novel methods of data gathering and storytelling that center the experiences of participants and help shift narratives and inform policymakers around the impacts of guaranteed income.

While the Philly Joy Bank Steering Committee has decided that it will not move forward with randomized-controlled trial (RCT) evaluation designs, due to concern for unintended harm and mistrust among community members, all other innovative evaluation approaches are welcome.

Evaluation Objectives:

- Increase knowledge and understanding regarding how guaranteed income specifically impacts both birth parents and infants during the perinatal period, including mental and physical health, financial stability, social determinants of health (e.g. education, housing, exposure to violence, and built environment) and other intended and unintended consequences
- Provide evidence to inform local, state, and federal policy changes regarding guaranteed income and guaranteed income-like programs

Desired Characteristics of the Evaluation Partner:

- Accessible and able to be present in the Philadelphia area to facilitate meetings, training, and relationship-building with community members and researchers
- Experience informing policy and practice through research and evaluation
- Commitment to equitable evaluation in design and in practice
- Experience working in partnership with communities
- Ability to build strong relationships and trust, particularly through clear, consistent, and transparent communication
- Ability to clearly communicate and explain research principles and methods to a lay audience
- Knowledge and familiarity with maternal and child health outcomes and drivers
- Knowledge and expertise regarding different methodologies and approaches to evaluate maternal and child health outcomes
- Awareness of and willingness to learn about cash transfers as a strategy to improve equity and promote dyadic parent-infant health and well-being

Eligibility Requirements:

- Open to all evaluation providers including academic centers, community-based groups, individuals, and research firms
- Priority will be given to groups with a demonstrated history of working closely with and for communities

Once selected, the evaluation partner would need to enter into a data license agreement (DLA) with the City, in order to access and share Philly Joy Bank data. This would require a separate agreement from the Fund's contract, which covers services and payment.

B. Services and Tangible Work Products

The Fund requires at least the services and tangible work products listed below. Applicants may propose additional or revised services and tangible work products, but should explain why each is necessary to achieve the project objectives.

i. Services

PDPH requires the services listed below including the specific tasks and work activities described. Applicants may propose additional or revised tasks and activities, but should explain why each is necessary to achieve the project objectives.

- o Regular meetings with the implementing team throughout the study
- o Qualitative and quantitative data collection, analysis, and interpretation to evaluate desired outcomes. Applicants should state methodologies to be used, which data sources would be leveraged, and include rationale for why this approach is preferred/optimal for evaluation of the Philly Joy Bank and the desired outcomes
- o Training and mentorship of community researcher(s) who will be active members of the study team and be involved in conducting the evaluation
- o Academic writing via conference abstracts and peer-reviewed publications to share findings with researchers and other guaranteed income practitioners
- o Meetings with community members, policymakers, and funders to share findings with stakeholders to advance the guaranteed income movement.
- o Database security and client privacy to ensure that all data collected regarding the Philly Joy Bank and its participants will be privacy protected and secured

ii. Tangible Work Products

PDPH requires completion and delivery of the tangible work products listed below. The proposed scope of work should state in detail how the Applicant would approach each work product, including the personnel/team members that would be responsible for delivering the work product. For each work product, the Applicant should propose criteria for satisfactory completion and delivery. Applicants may propose additional or revised tangible work products, but should explain why each is necessary to achieve the project objectives.

- o **Philly Joy Bank Evaluation Plan:** A detailed evaluation plan documenting the methodologies, data sources, and timeline for the Philly Joy Bank evaluation that incorporates feedback and input from the implementing team

- **Evaluation Presentations:** PowerPoint presentations and discussions with the implementing team on a regular basis (frequency to be determined by evaluation partner and implementing team) to share updates, preliminary findings, and results
- **Evaluation Report:** A final report with details regarding all learnings and findings, including appendices as needed
- **Academic products:** Conference submission and peer-reviewed publications to be developed with implementing team members as co-authors

This section is intended only as an overview of specific services to be provided by the applicant for this project.

iii. Milestones

PDPH anticipates the work for this project will be organized into the following milestones (at a minimum), i.e. or groups of tasks, services and/or work products, listed below. For each milestone, the Applicant should propose criteria to determine when the milestone has been satisfactorily completed. Applicants may propose additional or revised milestones, or a project structure that does not rely on milestones, but should explain their reasons for the structure proposed and how it will facilitate completion of the work.

- IRB approval
- Data collection
- Data analysis
- Final report

The Fund and PDPH reserve the right to condition payments on the satisfactory completion of the specified milestones, tasks, services and/or work products listed above. In addition to describing how each proposed milestone will be accomplished, the scope of work proposed by Applicant should identify the milestones the Applicant proposes as payment milestones and the amount it proposes for each milestone payment. Applicants may propose alternative means of payment, but should explain their reasons for the alternative and how it will facilitate completion of the work.

iv. Timeline

Milestone	Date
Questions due by	June 30, 2023
Responses to Questions posted	July 5, 2023
Deadline for submission	July 10, 2023
Interviews	July 17 to July 28, 2023
Final Selection	July 31, 2023
Anticipated Contract Start Date	August 1, 2023
Final Report	May 31, 2026
Contract End Date	July 31, 2026

The Fund anticipates that the work required under this RFP will be completed by July 31, 2026.

v. Budget

Estimated Budget for Evaluation Plan, including study team staff (inclusive of staff provided by the Applicant and community researcher(s)): \$400,000. If your evaluation plan costs more than that, please describe your experience and success in applying for grants, which would be done at the discretion of, and in conjunction with, the Fund and the implementing team.

SECTION III – SUBMISSION REQUIREMENTS

A. Organization & Personnel Qualifications:

Provide a statement of qualifications and capability to perform the services sought by this RFP, including a description of relevant experience with projects that are similar in nature, size and scope to that which is the subject of this RFP. The proposal must identify the applicant's qualifications by education level, skill set (described in detail), experience level, and job title. Resumes of all personnel so identified should be included in Applicant's proposal. Experience with similar projects should be cited.

B. Diversity Disclosure Report

See [Appendix A](#) for the Diversity Disclosure Report Form for RFP Applicants.

For large employers, such as universities, the Diversity Disclosure Report may be completed for the specific team or department submitting a response to this RFP.

C. Scope of Work Description:

The scope of work proposed by Applicant should include a detailed evaluation proposal, including proposed data sources, methods, outcomes, and a plan for how community researchers will be incorporated into the study team. The Applicant should also include a general project timeline that identifies all tasks, activities, deliverables, and milestones the Applicant proposes to carry out for the project and a time of completion (measured from project start date) for each. Applicants are welcome to propose more than one approach, and should include rationale for why the proposed approach(es) are best suited to evaluate the Philly Joy Bank and the desired outcomes. The scope of work should not exceed 10 pages (not including any relevant references, and separate from organization/personnel qualifications and budget) with single-spaced, size 12 font.

The Applicant may be asked to present this Scope of Work to the Philly Joy Bank Steering Committee, which will make final determinations regarding selection. We anticipate working with the selected evaluation partner to refine our initial evaluation objectives and finalize the evaluation plan, which may evolve in the design process in conversation with the Philly Joy Bank Steering Committee and community members.

D. Cost Proposal:

Applicants must provide a detailed cost proposal, which must include 1) a line-item breakdown of the costs for specific services and materials needed, and 2) allocation of funds to support staffing needed to carry out the evaluation plan. The proposed price must include all costs that will be charged to the Fund for the services and tangible work products the Applicant proposes to perform and deliver to complete the project.

E. References:

Include contact information for a minimum of (2) references who can speak to the applicant or firm's experience with similar types of work as that described in this RFP.

F. Deadline for Submission:

Responses to this RFP must be emailed as a single pdf by 11:59pm on July 10, 2023 to cityfund@phila.gov and Yuan.He@phila.gov.

G. Proposal review and Selection Process:

It is expected that proposals will be reviewed, and a limited number of Applicants will be asked to virtually present their evaluation plan to the Philly Joy Bank Steering Committee, to be held July 17, 2023 – July 28, 2023.

The successful candidate will be the person/group who demonstrates the knowledge, experience, and ability to perform the work effectively.

Per the Fund's contracting policies, the initial term of the contract between the Fund and the winning applicant will be one (1) year. The Fund PDPH fully expect to renew the winning applicant's contract by amendment for up to two (2) successive one (1) year terms at the option of the Vendor, the Fund, and the Philadelphia Department of Public Health.

SECTION IV – GENERAL TERMS

The Philadelphia City Fund serves as a Fiscal Sponsor for projects and programs administered by The City of Philadelphia (the City) and City-Related Agencies in order to advance City initiatives and improve the quality of life for all Philadelphians.

By submitting a proposal in response to this RFP, the Applicant agrees that it will comply with all contract monitoring and evaluation activities undertaken by the City of Philadelphia and the Philadelphia City Fund.

For this contract opportunity, the Philadelphia City Fund has agreed to act as the "Fiscal Sponsor" for the City of Philadelphia PDPH in order to facilitate the Philly Joy Bank on the City's behalf. The contract or contracts resulting from this RFP will be held between the Fund and the selected applicant(s).

What follows are contractual terms the chosen applicant will be expected to agree to. By submitting a proposal in response to this RFP, the applicant acknowledges and agrees to be bound by these terms unless otherwise noted in the applicant's proposals. The applicant may suggest alternative language to the following terms, and at the Fund's sole discretion, negotiation may be possible to accommodate an applicant's requested changes during the contracting phase.

A. Insurance Requirements

The standard minimum insurance policy requirements to be maintained by Vendors of the Philadelphia City Fund are listed below. Vendor must maintain:

1. Workers' compensation (or similar) insurance as required by the jurisdiction where the Services are performed
2. Commercial general liability insurance (including products liability, completed operations and contractual liability coverage) with minimum limits applicable to bodily injury and property damage of \$1,000,000 per occurrence, and \$2,000,000 in aggregate, and containing a waiver of subrogation against The Fund
3. Excess or umbrella insurance with minimum limits of \$1,000,000 per each occurrence and \$2,000,000 in the aggregate and containing a waiver of subrogation against The Fund
4. Errors and omissions insurance with minimum limits of \$1,000,000 combined single limit

Such policies must (a) be in Vendor's name unless agreed upon in writing by the Fund, (b) include the Fund and its employees as additional insureds, (c) not have a deductible exceeding \$25,000 per claim, and (d) be placed with insurers reasonably acceptable to the Fund, having a Best's rating of no less than "A-". These minimum insurance amounts are not to be construed as limiting a Vendor's right to obtain additional coverage and higher liability limits at Vendor's discretion. Vendor may be required to provide proof of insurance at the Fund's discretion.

B. Confidentiality

Through performance of the Agreement resulting from this RFP, the selected Vendor may receive or have access to Confidential Information of the Fund and PDPH, which may include certain information concerning the Services and other information not generally known to the public. Vendor shall not disclose any Confidential Information it receives from the Fund and PDPH to any person or entity except (a) employees or contractors of Vendor, and (b) Vendor's professional advisors who have a need-to-know such information, provided such professional advisors have agreed in writing to maintain the confidentiality of such information pursuant to confidentiality agreements containing confidentiality obligations that are not materially less restrictive than those contained in the Agreement, or such professional advisors are bound by law or codes of professional conduct to keep such matters confidential. Vendor shall inform such employees having access or exposure to Confidential Information of Vendor's obligations under the Agreement. Vendor shall use not less than the same degree of care (but no less than a reasonable degree of care) to avoid disclosure of such Confidential Information as Vendor uses for its own confidential information of like importance. Vendor shall use reasonable efforts to ensure that Confidential Information and all materials relating to the Fund and PDPH at the premises of Vendor or in the control of Vendor shall be stored at locations and under such conditions as to prevent the unauthorized disclosure of such information and materials. Vendor may not use the Confidential Information for any purpose other than for the performance of the Services under the Agreement. This obligation shall survive the termination of the Agreement. Vendor shall return the Fund and PDPH materials, if applicable, to the Fund promptly upon termination of the Agreement or earlier if requested by the Fund.

“Confidential Information” means all non-public information in whatever form transmitted, whether written, electronic, oral or otherwise, including without limitation business plans, specifications, design plans, drawings, software, data, prototypes and other business and technical information that is disclosed by the Fund and PDPH pursuant to the Agreement and that is marked as “confidential” or “proprietary” (or, if disclosed orally, designated as confidential upon disclosure) or which, under the circumstances surrounding disclosure, a reasonable person would deem as confidential. Notwithstanding the foregoing, Confidential Information shall not include information that: (a) is independently developed by Vendor or lawfully received by Vendor free of restriction from another source having the right to so furnish such information; (b) is or becomes generally available to the public without breach of the Confidentiality Agreement by Vendor; (c) at the time of disclosure, was known to Vendor free of restriction; or (d) is required to be disclosed pursuant to any statute, law, rule or regulation of any governmental authority or pursuant to any order of any court of competent jurisdiction; provided however, that: (e) the Vendor shall use commercially reasonable efforts to notify the Fund and PDPH before disclosure, (f) Vendor shall disclose only such portion of the information as is legally required; and (g) the disclosed information is not “Confidential Information” only for the purpose of and to the extent of the required disclosure, and otherwise remains “Confidential Information” subject to the terms and conditions of this Agreement.

C. Representations, Warranties, and Covenants

The selected Vendor represents, warrants and covenants that so long as the Agreement resulting from this RFP has not been terminated: (a) Vendor has full power and authority to enter into and perform its obligations under the Agreement; (b) entering into and performing its obligations under the Agreement (i) will not violate or breach any agreement binding on Vendor; and (ii) does not result in a conflict of interest between the Services or Works to be provided under the Agreement and Vendor’s other activities. Vendor shall advise the Fund and PDPH of any conflict of interest that arises during the performance of the Agreement. (c) The Services and Works will: (i) be created and originated by Vendor and may be conveyed to the Fund under the Agreement free and clear of claim of ownership by others; (ii) not violate or infringe any proprietary information, non-disclosure, copyright, patent or other intellectual property or contractual right; (iii) not violate any applicable law, rule or regulation; (iv) conform with the Agreement, be performed in a workmanlike and professional manner, be of high quality, and in no event, be of a quality less than the quality of services performed and work product created by a skilled consultant with expertise in the area for which Vendor is providing the Services; and (v) be free of errors and that all failures of the Services or Works furnished hereunder will be corrected to conform with the Agreement.

D. Indemnification

The selected Vendor shall indemnify, defend and hold the Fund and PDPH harmless from and against any damage, loss, liability, obligation, claim, litigation, demand, suit, judgment, cost or expense including, without limitation, reasonable attorneys’ fees (“Claims”) that may be made: (a) for bodily injury, death, or damage to real or tangible personal property, including theft, resulting from the acts or omissions of Vendor, its employees or agents; (b) in connection with Vendor’s breach of its obligations under the Agreement; (c) by any third party alleging that the Services or Works violate any proprietary information, non-disclosure, copyright, patent or other intellectual property or contractual rights; and (d) in connection with Vendor’s recklessness, gross negligence, willful misconduct, or violation of

applicable law. The Fund and PDPH may participate at its expense in any Claim, and the Fund and PDPH's prior written consent is required for settlement of any Claim.

Except for the indemnification covenants contained in the first paragraph of this Section, for which no cap shall be applicable, if Vendor has any other liability to the Fund and PDPH for any Claims, such liability shall in all cases whatsoever be limited to the greater of (e) any amount of insurance Vendor is required to carry as set forth in the Agreement, and (f) the total amount received by the Vendor for the Services under the Agreement.