

SOCIAL RETURN ON INVESTMENT PILOT PROJECT RFP



United Way of Greater Milwaukee & Waukesha County is seeking an evaluation partner as we pilot a project to calculate Social Return on Investment (SROI) metrics for one of our key initiatives: Reducing Barriers to Employment and Advancement (RBEA). We currently have a cross-site evaluation in place to demonstrate progress toward our goal, which is that 15,000 people will be ready to start stable careers having overcome key employment barriers by 2029.

We are planning to add SROI metrics to our existing evaluation to show donors the value of investing in the RBEA key initiative in terms of concrete benefits, such as financial savings to the community. Specifically, we want to demonstrate how many dollars will be or have been saved for every dollar invested in RBEA, as well as any other SROI metrics that will allow us to show the full impact of the RBEA initiative. SROI numbers will primarily be used by our fundraising and marketing teams to attract new donors to United Way and to provide additional credibility and transparency for our work.

SCOPE OF WORK

This funding will support a pilot project to establish SROI metrics for the RBEA initiative. Currently, RBEA grants support 28 programs in our four-county area (Milwaukee, Waukesha, Washington, and Ozaukee Counties in Wisconsin), covering four different program focus areas: education/certification, transportation, justice-involved individuals, and employment. The goal of this pilot project will be to develop SROI metrics for the programs funded during one funding year (July 1, 2025, through June 30, 2026). The SROI metrics should demonstrate the effectiveness of investing in RBEA as a whole, not just a single focus area or program. However, it may be helpful to evaluate each focus area for our own purposes, to determine where our funding is having the greatest impact. This project will require engaging stakeholders, including members of our donor networks and RBEA-funded programs, to guide SROI metric selection. We also expect this project to include an internal

capacity-building component to help us better understand the SROI calculation process so we can use these metrics appropriately and effectively.

Additional information on RBEA, including the programs funded and the outcomes currently collected and reported by the funded programs, are available on our website, here: <https://www.unitedwaygmwc.org/Reducing-Barriers-to-Employment-and-Advancement>

TIMELINE

Following are relevant dates for this funding opportunity:

- RFP released: 8/26/2026
- Information session: 8/28/2026
- Applications due: 9/30/2026
- Notice of award: 10/21/2026
- Funding start date: 11/1/2026
- Initial report due: 3/31/2027
- Final deliverables due: 4/30/2027
- Funding end date: 4/30/2027

INFORMATION SESSION

We will hold a virtual information session via Teams on Friday, August 28, from 11:00 am – 12:00 pm Central Time. Please connect via this link:

<https://teams.microsoft.com/meet/287580295170473?p=BIJv8JpvXhY00PG3n>

If you have questions about the RFP and are not able to attend the session, please submit them to Andrea Jehly at ajehly@unitedwaygmwc.org.

A full list of the questions and answers from the session and a recording of the session will be made available the week after the session.

DELIVERABLES

- Initial report summarizing feedback from stakeholders and recommendations on which SROI metric/s would best meet stakeholder needs

- Final report providing the SROI metric/s calculated for the RBEA program and detailed information about how the SROI numbers were calculated, including sources of information and any assumptions or proxies used to calculate the numbers
- Capacity building meeting with United Way staff who will be using the SROI numbers to explain how they were calculated and guidance in using and sharing the SROI numbers with stakeholders

BUDGET

One award will be made with a maximum value of \$20,000. Please attach a detailed budget for this project. Note that we will plan for meetings to be virtual, so no travel expenses are anticipated.

WORK PLAN

Please attach a proposed work plan for the funded period, including key milestones, meetings, and deliverables.

PROPOSAL SCORING

United Way will review and score each proposal using the attached scoring rubric.

We aim to support organizations in our four-county area (Milwaukee, Waukesha, Ozaukee, and Washington Counties in Wisconsin) whenever possible. If two or more proposals score equally high using the scoring rubric, whether an organization is in our four-county area will factor into our funding decision.

Questions (2000 characters per question)

Methodology and Deliverables

1. Describe your proposed approach and strategies for implementing the Scope of Work. Is there anything missing from our scope of work and deliverables that you think would be an important component of this project?
2. Describe how you will identify and engage the primary stakeholders (United Way staff, members of our donor networks, RBEA-funded agencies).

3. Describe any barriers that you anticipate and how you will address them.
4. Describe your approach to building United Way staff's capacity to calculate, use, and disseminate SROI information. What would you need from United Way to do this effectively?

Qualifications and Experience

5. Describe your qualifications to implement the scope of work. Include past and current experience or approach to SROI calculation.
6. Provide information on the staff who will be working on this project, their roles, and their experience with a project of this type. (Attach resumes/CV's for the project lead and any other staff working on the project.)
7. Do you intend to subcontract any of this work? If so, explain what work would be subcontracted and your plan for oversight of any proposed sub-contractors or consultants.