

Evaluation Design and Methodology

Questions about the purpose, scope, structure, and integration of the qualitative evaluation.

- 1. How does this qualitative evaluation specifically complement and build upon the quantitative data collected by UpTogether?**

We would expect the selected evaluator to work with CUOC and UpTogether staff as well as community partners to identify emerging trends or gaps in the quantitative data that could be explored more deeply using qualitative methods.

- 2. Are there particular gaps or emerging questions from the quantitative data that the qualitative work should prioritize?**

At this point, we see a few areas we may want to dig more deeply into. However, we are not prepared to commit to anything until the evaluator is on board and assisting in reviewing the available data.

- 3. Can you please help clarify what is meant by a “primarily” qualitative evaluation?**

If during the review of current data, the selected evaluator believes that the scope would benefit from the use of mixed methods, we would want to explore that. We have the ability to revisit the inclusion of additional quantitative questions in the UpTogether portion of the evaluation.

- 4. CUOC mentions the evaluation should build off the quantitative findings from UpTogether. Would the selected evaluator be required to conduct a secondary analysis of the raw quantitative data, or synthesize findings provided by UpTogether?**

The selected evaluator would not be required to conduct a secondary analysis of raw quantitative data. If after reviewing the current findings there is a data analysis the selected evaluator is interested in, we would work with UpTogether to conduct that analysis if possible. Our focus is on taking what we currently have, identifying interesting findings that a qualitative evaluation could explore.

- 5. Is the intent to conduct a comparative analysis across these areas, or to include them collectively as part of a broader impact assessment?**

The intent is to include them as part of a broader impact assessment.

- 6. Would CUOC be open to a story-based inquiry approach (e.g., narrative inquiry or SenseMaker)?**

Yes.

- 7. How does CUOC intend to use the evaluation findings and data (program improvement, reporting, strategy)?**
- 8. How does CUOC intend to use findings for field-building or guaranteed income policy windows?**

CUOC intends to use the evaluation findings for demonstrating the impact of direct cash assistance in CT, and making program and policy recommendations for future direct cash assistance work in the state.

- 9. How will CUOC measure success for this evaluation beyond deliverables (capacity building, narrative change, policy adoption)?**

CUOC will measure success for this evaluation by looking at staying within allocated budget and timeline, the quality of the deliverables, and the ability of the deliverables to be used in narrative change and policy work.

Data Access and Coordination with UpTogether

Questions about data sharing, timing, and collaboration between evaluation teams.

- 10. When will the selected evaluation team have access to the quantitative evaluation findings from UpTogether?**
- 11. Will UpTogether provide data to the evaluation team? What format will it be in?**
- 12. Would the selected partner have access to UpTogether's de-identified data?**

Upon selection of the evaluator, they would have immediate access to the baseline and midline report that UpTogether has already produced. These data aggregate in a report format. Access to additional, record-level deidentified data would require a data sharing agreement between UpTogether and the evaluation consultant that can be negotiated as the scope and need for additional data is determined.

- 13. To what extent will the quantitative evaluation team be involved in planning or available for questions?**

The team (from UpTogether) would be available on an ad hoc basis or a structured schedule can be set in needed with support from CUOC.

- 14. When was the quantitative evaluation conducted and what did it entail?**

Quantitative evaluation data was collected at baseline (May – September 2024) and end of the first year of The Changemaker Fund (May – September 2025). It will occur two more times (May – September 2026 & 2027). It consisted of an online survey with open-ended questions.

15. What level of coordination with UpTogether do you anticipate (data-sharing cadence, joint learning sessions)?

CUOC maintains regular communication with UpTogether and meets as needed. The level of coordination will be determined according to project needs and in collaboration with UpTogether and CUOC.

16. Would it be possible to access the UpTogether survey instrument and strategy documents (logic model, theory of change)?

CUOC will work with the selected evaluator to access the needed documents. See Appendix A for an explanation of their evaluation work.

Community Engagement and Participation

Questions about resident involvement, participatory design, and advisory structures.

17. When it comes to authentically engaging residents throughout evaluation processes, what does that look like to CUOC?

18. What are the expectations regarding involvement of participants in the design of tools, data interpretation, etc.?

19. How does CUOC define or envision “community-informed?”

We expect evaluators to engage with the non-profits/community-based organizations CUOC partnered with initially to identify the Changemakers and with the Changemakers to review the existing data report, discuss trends they see in the data, and gather input from the partners and the Changemakers on additional questions or methods they believe could be useful as well as input on interpretation of the findings. This should happen, at minimum, at the beginning of the process, at the end of the first year in preparation for the second year, and a final presentation of the results to the non-profits/community-based organizations CUOC partnered with and Changemakers before finalizing the deliverables.

20. Is the Community Advisory Council from the Benefit Navigation Study still active? Could one be created?

The Community Advisory Council no longer convenes. If the selected evaluator wishes to do this, CUOC will assist in connecting the evaluator with members of the Council.

21. What is your appetite for involving trained resident peer evaluators?

Not opposed to involving trained resident peer evaluators so long as the scope is well defined and they are compensated for their work.

22. Are there existing community advisory groups or structures that could be engaged?

CUOC partnered with non-profits/community-based organizations to identify the Changemakers and would do so again for this evaluation as needed.

23. Do you expect the evaluator to provide stipends to community researchers?

24. Are evaluators to provide stipends for community researchers?

If you are referring to evaluation participants, we can provide the stipend. If you are referring to individuals the evaluator engages as part of their evaluation team, that would have to come out of their budget.

25. Are there specific language access and accessibility needs (translation, ASL, childcare, transportation)?

26. What proportion have a primary language other than English or Spanish?

27. In addition to English and Spanish, do participants prefer other languages?

Many Changemakers (about 25%) prefer to communicate in Spanish thus translation would be required for those participants. We expect that childcare and potentially transportation may be required for participation in evaluation activities and should be covered under the selected evaluators budget. A small number may speak Portuguese (from Brazil primarily).

Participants and Sampling

Questions focusing on the 120-participant cohort and sampling expectations.

28. How were participants selected for the pilot?

Participants were selected based on the criteria in Appendix B.

29. How many participants are in each city?

40 in each city with rare exceptions of some who may have moved from their initial cities.

30. Do participants know each other prior to the program?

Some may have known each other prior to participating in the Changemaker Fund.

31. Are there community-based partners in the pilot cities?

Yes, CUOC partnered with them during the selection process for the Changemaker Fund.

32. Are there desired ranges for total interviews/focus groups?

No, our only concern is that is be methodologically sound.

33. Do fund organizers have other touchpoints with participants?

We expect that we will have other touchpoints with participants over the timeframe of the evaluation.

34. Is a representative sample sufficient, or must all 120 be engaged?

35. Are you open to a sampling strategy engaging a subset of participants?

Given the number of Changemakers, we would expect some sampling would have to occur.

Incentives, Equity, and Compensation

Questions addressing participant stipends, equity principles, and cost responsibilities.

36. Do you have a separate pool of money for participant incentives?

Yes.

37. Are evaluators expected to include participant incentives in the budget?

38. Should participant incentives be included within the proposed \$125,000 budget?

39. Should participant incentives be included in the \$125K cap?

40. Is the \$125K cap inclusive of stipends?

No. Participants incentives are separate. Stipends for community researchers or advisory boards should come from the selected evaluator's budget.

41. Do participants currently receive incentives for UpTogether surveys?

Yes.

42. We consider equity at every stage... are meals and transportation costs supported by the Fund or in consulting budget?

Meals and transportation should come from the evaluation consultant budget.

43. Would translation be supported by the Fund or consultant?

Translation and interpretation of evaluation-related items fall under the evaluation consultant budget.

44. Is compensation for people with lived experience included in our budget?

Yes. Only for evaluation participants – but not if they serve on an advisory body or as community researchers/evaluators.

45. Can the foundation expand on the “approach to equity” requirement in Section V?

CUOC is seeking evaluators with experience working with diverse communities and intentional in addressing things like historical and systemic inequities in their evaluation practice. This should come through in the approaches that the evaluator employs and the frameworks they use to design the evaluation, collect data, analyze data, present their findings, and engage people in making meaning or using the results. We would like to see evidence of that in past or ongoing work the respondent is involved in.

46. CUOC prioritizes linguistic and cultural inclusivity — would bilingual facilitation be preferred?

Ideally, that is our preference. However, we understand that an adept facilitator could also work effectively with interpretation if necessary.

Budget, Contracting, and Administrative Details

Questions about the structure of funding, contracts, indirects, and submission process.

47. Is this a fixed-price or time-and-materials contract?

48. For budgeting purposes, is funding a grant or a contract?

This is a fixed-price contract.

49. Are fringe or indirect costs allowable, and what are the caps?

Yes, they are allowed. Indirect costs are capped at 10% of total project cost.

50. Is there flexibility in the project kick-off date?

There is some flexibility in the kick-off date provided the first deadline in November 2026 can be met.

51. When will finalists submit detailed budgets or SOWs?

52. Will interview-stage applicants also submit formal proposals?

After the interview process, those under consideration will be asked to submit additional information including a more detailed budget and proposed SOW.

Timeline, Deliverables, and Reporting

Questions clarifying deadlines, deliverables, and types of reports.

53. Does CUOC have a timeline or calendar for cash fund distribution?

Cash is distributed twice a month.

54. Will all data collection occur before the end of Year 3?

It is expected that data collection will occur during Years 2 and 3 of the Changemaker Fund.

55. Is there flexibility for final analysis after final disbursements?

Potentially.

56. Could CUOC clarify the number and timing of deliverables?

CUOC expects a report at the end of year one of the qualitative evaluation which would be year two of the fund (November 2026). Toplines after each interview/focus group would also be expected. Additionally, we would expect topline after the second year of the evaluation (final year of the fund).

57. What kind of final report is expected (Storymap, traditional, etc.)?

58. Would formats like infographics or public-facing materials be valued?

A written final report is preferred supplemented by other materials that can be used for presentations or social media (i.e. fact sheet, PowerPoint, Instagram Reels, etc.).

59. Beyond the Year 2 interim and final report, would iterative learning sessions be useful?

Absolutely.

Logistical and Operational Considerations

Questions about implementation logistics.

60. Will CUOC assist with participant outreach?

61. Will the evaluator handle recruitment?

The expectation is that the evaluator will take the lead in participant recruitment with support from CUOC and UpTogether.

62. Are focus groups/interviews to be done in-person, virtually, or hybrid?

Other direct cash assistance partners have found that in-person is preferable to virtual. Our preference is in-person but also recognize that flexibility is needed and we are willing to accommodate virtual if in-person becomes infeasible (weather, political climate, etc.).

63. How many field days do you anticipate for in-person data collection?

For planning purposes, you could assume one to two days for meetings at the beginning of the process, during data collection (at least 2x), and for follow-up meetings.

64. Will there be in-person planning or sensemaking meetings?

When the evaluator is in the field, we would expect to engage in person. We would recommend to budget for at least one additional in person meeting outside of field work in the event it is needed. Other than that, engaging virtually is sufficient.

65. Is CUOC providing in-kind support (meeting spaces, connections)?

Yes.

66. Do you have existing CBO partnerships to assist recruitment?

CUOC will reach out to previous partners that assisted with the Changemaker Fund to assist in recruitment, if they are able to.

Policy and External Audiences

Questions about how the findings will be used externally and who they are intended for.

67. Who are the priority audiences (participants, partners, policymakers, media)?

68. Are there specific policy audiences CUOC hopes to influence (agencies, legislators, philanthropy)?

CUOC aims to influence a range of audiences. For the purposes of this evaluation, we are looking at both policy makers (electeds and agency heads) as well as being able to translate the results for a lay audience (voters).

Organizational Eligibility and Competitiveness

Questions on who can apply and evaluation of applicants.

69. We note the preference for CT-based teams. Are non-local teams still competitive?

70. Would CUOC prefer or require a CT-based co-evaluator/CBO partner for community or policy translation?

A CT-based co-evaluator is not required but would be looked upon favorably during the selection process. Non-local teams are still competitive for this opportunity.

71. Can you clarify what is desired in the Sample Work Product?

Ideally, respondents would supply copies or links to completed evaluations or able to be shared so the selection team can review the work. We will also accept redacted evaluations that can include reports and/or presentations.