Request for Proposals for a Rapid Needs Assessment of Financial Empowerment Needs of Indigenous Families in Mexico

November 23, 2021

Background

Sesame Workshop (SW), the non-profit educational organization behind Sésamo is requesting proposals from individual or organizational consultants capable of conducting a rapid needs assessment of the financial empowerment needs of indigenous families of young children in Mexico. In partnership with the MetLife Foundation, Sesame Workshop seeks to expand its successful Dream Save Do: Financial Empowerment for Families program for children, caregivers, and education practitioners, to historically marginalized communities, with a clear emphasis on women and girls.

Specifically, SW seeks to accomplish the following project objectives:

- Help indigenous children and the adults in their communities understand that the choices that they make every day could help them reach their goals (both financial and non-financial).
- Provide adults, particularly women, in these communities with information about financial empowerment to engage in discussions with their children and model positive financial empowerment behaviors.
- Provide children and adults in these communities with the skills and knowledge necessary to practice spending, saving, sharing, and donating.
- Equip adults and children in these communities with knowledge and skills related to financial health and empower them to transfer their knowledge and skills to people in their households and community spaces.
- Provide parents, caregivers, and community leaders with language and strategies to practice resilience and flexibility to overcome financial challenges.

To accomplish the above, SW’s planned strategies include both a center-based intervention delivered through partnerships with local governments, and a community-based intervention to help reach children and families beyond the reach of school systems.

SW requires a research partner to conduct a needs assessment that provides a strategic overview of the needs and practices relevant to cultivate the financial wellbeing of families with children ages 3 to 6, who self-identify as indigenous. The research partner will be expected to engage meaningfully in learning about the program and its trajectory in Mexico, to identify culturally responsive ways to enhance positive financial behaviors among the intended populations.

Research questions

Key questions for this needs assessment will be:

- How do families think about the future? What are parents’ hopes and plans for their families’ futures?
  - In what ways do thoughts about the future vary by parent’s gender?
  - In what ways do parents’ thoughts about the future vary by child’s gender?
How do parents discuss the future with their children, including challenges their child may encounter?
- In what ways do conversations about the future vary by parent’s gender?
- In what ways do parents’ conversations about the future vary by child’s gender?

How do parents discuss planning for the future with their children and help children take steps towards that plan?
- In what ways do these conversations with children on hopes and plans vary by gender of the parent?
- In what ways do these conversations with children on hopes and plans vary by gender of the child?

How do parents help their children learn about using or saving money?
- How does this relate to parents’ personal strategies and self-efficacy towards financial empowerment?
- In what ways do these conversations with children on hopes and plans vary by gender of the parent?
- In what ways do these conversations with children on hopes and plans vary by gender of the child?

How do parents navigate children’s needs versus children’s wants?
- In what ways do these conversations with children on hopes and plans vary by gender of the parent?
- In what ways do these conversations with children on hopes and plans vary by gender of the child?

What types of resources would support parents in having these conversations with their children?
- Where and from whom do parents seek support and advice? Also what role should schools/the community play in financial empowerment of children?
- In what ways do these resource needs vary by gender of the parent?
- In what ways do these resource needs vary by gender of the child?

What role do parents think schools and the community should play in children’s financial empowerment?
- Are there existing community strategies related to financial empowerment?

Intended populations and geographic locations
Parents of children ages 4-5 living in Puebla or Veracruz (Mexico) who identify as indigenous. It is expected that Spanish and Nahuatl-speaking families will be represented in this study.

Methodology
The study should provide as much quantitative data as possible and include a strong qualitative component
Acceptable methods include secondary literature review, in-depth interviews with key informants, focus groups and surveys. Vendor may suggest alternative suitable methods in proposal, justifying the decision to use.
Proposal Components:

Proposals shall include a provision for delivery of the following elements:

1. Data collection and analysis plan.
2. Detailed timeline and budget.
3. CVs or biographical summaries of consultant or key personnel.
4. Summary of comparable experience (dossier of other research projects undertaken by vendor with similar scope and focus).

Deliverables:

1. Data collections instruments, videos, transcripts, and other material: Researchers will be required to submit an electronic version of any interview protocols, videos or photographs made during the research sessions, and all interview transcripts and data sets. These items will become the property of Sesame Workshop.
2. Draft and final report of findings

Estimated Timeline:

<table>
<thead>
<tr>
<th>Execution of contract</th>
<th>January 10, 2022</th>
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</thead>
<tbody>
<tr>
<td>Draft report of findings</td>
<td>April 4, 2022</td>
</tr>
<tr>
<td>Final report of findings</td>
<td>April 11, 2022</td>
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Budget:

Please submit a complete budget with your proposal.

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Experience in conducting similar research
- Experience working with vulnerable populations in similar studies
- Experience conducting research in Spanish, Mayan, and Nahuatl
- Demonstrated capacity to work in a range of settings and to deliver products in a timely fashion under tight and strict monitoring, management, and deadlines
- Ability to produce high-quality reports
- Proposed timeline for deliverables
- Feasibility of study within timeline
- Appropriateness of study design
- Capacity to execute proposed study

How to Submit Proposals

Proposals should be submitted by **December 17, 2021**.

Submit proposal via email to Stephanie Akiki at stephanie.akiki@sesame.org using the subject heading: RE: PROPOSAL FOR DSD NEEDS ASSESSMENT: MEXICO