**Request for Proposals for
Rapid Field Research Projects**

TLDR;
- *What*: The Lab is requesting partnership opportunities to conduct research to improve your existing climate mobilizing or organizing program and share that research with the climate community
- *When*: Deadline for proposals (1–2 pages): July 1st
- *You*: 501(c)(3) nonprofit, no research experience necessary
- *By when*: Bulk of work will occur in July–November of 2021
- *You contribute*: Expect this to require 0.5 FTE of your staff time during that period, plus some time helping to share findings with the Lab community
- *You receive*: $20,000 in financial support, plus in-kind technical services
- *We create together*: Practical knowledge about how to win on climate!

Background
The [Climate Advocacy Lab](#) is committed to uncovering new knowledge to improve climate advocacy so we can win more campaigns. The Lab has been contributing funds for testing, polling, experimentation, and other evidence-based advocacy since its inception in 2015. The Climate Advocacy Lab is seeking a small number of field partners interested in exploring ways to improve their existing organizing or mobilizing programs, with whom we can collaborate to conduct quick turn-around research projects to test best practices in activist engagement. This is a component of the Lab's [research and partnerships program](#).

Overview of the Research Projects
These projects are rooted in in the Lab's desire to help the climate movement better understand one of the critical questions for us (and any movement) to win: How to build our people power. In particular, we're interested in how to encourage more people to participate, and for those who already are participating, how to boost their activism even further.

These projects will focus on testing in practice three elements for generating people power that social science theory and extensive past data[1] have suggested are important for moving people to participate in collective action:
- *They are motivated by an injustice towards those like them*
- *They possess a sense of a shared group identity*
- *They believe that acting together with others can be successful (this belief is termed 'collective efficacy' by social scientists)*

Yet a [recent review](#) of materials from many environmental advocacy organizations suggests these organizations are not consistently using those three elements. We wish to work with field partners to conduct rigorous tests to evaluate the on-the-ground effects of systematically using these three elements in climate mobilizing or organizing programs, to determine if these elements work in practice for a diversity of climate advocates, and not just in theory. *In other words, what happens when you emphasize injustice, collective efficacy, and shared identity when engaging supporters?* If these tests confirm the elements' effectiveness across a range of campaigns and communities, that will provide a solid base of evidence for the Lab to recommend them as best practices for the climate community.

For more details on the research projects, see the Appendix.

Nature of the Partnerships
The $20,000 of financial support component of these partnerships is intended to compensate staff time and any ancillary costs associated with the research project for you as a field partner[2]. The research should be layered into existing activities, so we expect little to no additional direct programmatic costs to be incurred. The Lab–in consultation with but at no cost to each field partner—will also recruit and pay for a 'technical partner' (such as a data analytics consultant or social scientist) to advise on research design and conduct the final analysis[3]. As the field partner, you will work closely with that technical partner on the design and implementation of the project, and the Lab will offer additional advising and project management support. It is vital that you have the drive and staff capacity to make these experiments a success.

As should be clear, we don't see these projects as a typical funder/grantee relationship, but rather as opportunities for a close working partnership and mutual learning experience on a joint project. This is a collaboration first, and grant second. We hope to proceed in these working relationships in a spirit of mutuality and respect for the unique perspectives, needs, and attributes each partner brings to the table. We are mindful of the wisdom in this regard contained in documents such as the [Jemez Principles](#) and [The Principles of Environmental Justice](#).

Eligibility
*People of color-led, environmental/climate justice, community-based, and multi-issue organizations are **strongly encouraged** to apply and will be given active consideration.*

We are excited to work both with organizations who have prior research experience as well as those that have not previously conducted testing or other kinds of research; we understand that many are not familiar with formal research

methodologies, and we welcome questions and clarifications. You also may wish to check out our [guidance on designing a research project](#).

Beyond that, we are looking for field partners who:
- Are 501(c)(3) advocacy organizations working on climate or clean energy in the US
- Have a pre-existing public engagement program or campaign into which this research project could be integrated, with at least around 1,000 active supporters[4]
- Are excited to try something new and disrupt standard operating procedures in the interest of learning
- Can move quickly on this project, working closely with the Lab and a technical partner
- Are currently or are interested in becoming members of the Climate Advocacy Lab (those involved in proposals who are not yet members should [apply to become Lab members](#)). Membership is free and requires no time commitment.
- Are willing to share results and methods with the Lab community

Timeline
- RFP issued: June 10th
- Deadline to apply: July 1st
- Partnership decisions made by the Lab: Mid-July
- Initial $10,000 payment, July
- Project design (in conjunction with the Lab and technical partner): Mid-July to mid-August
- Implementation of test & data collection: Mid-August to mid-October
- Initial results analysis completed by technical partner: Mid-November
- Webinar to share combined results to community: By mid-December
- Final $10,000 payment, December

Mutual Expectations & Commitments
The Lab commits to a partnership grounded in a commitment to mutually beneficial relationships, learning and improving how we co-create knowledge, receiving honest feedback, and working together through shared challenges along the way. In addition to funding, we commit to providing technical expertise, project management skills, and experience in fostering joint field research. We are open and flexible to jointly creating these commitments together.

In order to make these projects successful, field partners will need to engage in the following ways during the course of the research project itself and subsequent sharing back of insights with the rest of the Lab community[5]:
- Collaborate with the Lab and the technical partner in co-creating the design and measurement of the research project and the new materials and procedures it will entail for your organization (July–August)

- Implement the research project in your program/campaign, and collect the data to evaluate it; this timeline is vital—please make sure your organization can accommodate (August–October)
- Contribute to and provide feedback on the final report (the technical partner will be principally responsible for producing this) (October–November)
- Compose a reflection report, a short (equivalent to about 1 written page) product (e.g., memo, slide deck, or simple video) for other Lab members describing the experience of the process of conducting research, lessons learned integrating new techniques into existing practices, and the overall impact of the project and findings in your ongoing programs; it is also desired, though not required, to get a testimonial statement from your organization about the experience of working with the Lab (by early 2022)
- Participate in one or two Lab-hosted webinars or other events to describe the project (by mid-2022)
- Provide a brief (one page or less) long-term update as to whether implementation of practices based on research results has produced ongoing improvement in program performance vs. pre-project baseline (mid-2022)

Proposals

Proposal documents should be no longer than 2 pages, and cover the following topics:
- Brief description of your organization and theory of change (if available)
- Your motivation for wanting to conduct this project (what you hope to learn, including anything more specific than or in addition to what we've laid out)
- Description of the existing program or campaign you'd like to use as the setting for this research, including how you envision the test integrating into that work
  - Note if you would want to explore any differences among groups of activists in how they respond (for example, comparing those of different races, or histories of involvement with your organization)
- The key outcome(s) you would like to use to measure the impact of this project, including if and how you currently collect that information, and an approximate current level of the outcome (for example, the typical action taking rate for your campaigns)
- The size/scale of this program or campaign, in terms of the number of members/activists/volunteers you could conceivably be involving in the test[6]
- The key personnel from your organization who would be involved in this project, along with who would be our primary point of contact during the project
- If the timeline and expectations described above are not feasible for you, what modifications would you propose making

- Please make sure the activities you describe are permissible 501(c)(3) activities. Funds may not be used to influence the outcome of an election for candidates for public office. In addition, please do not include descriptions of lobbying activities that would require the grantee or the Lab's fiscal sponsor to register under the Lobbying Disclosure Act or under the lobbying or campaign finance laws of any state or municipality. Funds may not be used for these purposes.

Next Steps
To give proposals full consideration, we will need to receive them by **July 1st, 2021**. Send proposals to Justin Rolfe-Redding (he/him) (justin@climateadvocacylab.org), with the subject line "Rapid Field Research RFP".

If you have questions, feel free to reach out to Justin via email or through a call (schedule here). Additionally, we will hold a webinar and Q&A session on Wednesday, June 16th at 4pm ET (3 CT, 2 MT, 1 PT) as an alternate way for those interested to learn about these partnership opportunities (you may request a recording if you cannot attend).

APPENDIX: More Details Regarding the Research Project

There are many ways to integrate these elements (justice, efficacy, identity) into organizing and mobilizing programs. For example, you can elicit a sense of injustice by describing the inequitable winners and losers of climate change and making clear your supporters stand to lose ("Those of us least responsible for climate impacts feel them the worst, while fossil fuel companies profit"). You can boost collective efficacy by highlighting policy wins, or discussing campaign strategy with volunteers ("here's how your action contributes with those of others to an overall plan"). Shared identity can be fostered with simple labeling and description ("By taking action you've joined a community of fellow climate activists"), creating physical or online spaces for supporters to interact, framing existing identities in terms of climate ("Climate Justice is Racial Justice"), or embedding communal cultural activities into events (like musical performances before phone banking). Depending on your bandwidth and the specifics of your program, research projects could involve implementing and testing all three of these elements, or only one or two.

We look to you regarding specific outcome measurements of activist engagement most relevant and valuable to your work, in order to assess the tests. That said, we are most interested in those outcomes that are clearly related to movement and power building, rather than 'vanity metrics' (such as clicks, or social media likes). That is, does integrating injustice, collective efficacy, and shared identity into an engagement program improve rates of some key, strategic, or high leverage action or process, such as increasing the personalization of letters to policymakers, a relational organizing task (such as reaching out to 15 contacts), converting supporters who take sporadic actions into regular activists, or up-laddering action-takers to become leaders.

We believe that a "randomized controlled trial" research design (a type of "test" or "experiment") is well-suited to answering the question that inspires these projects. This would most likely involve taking a list of current (or prospective) supporters and randomly selecting some to be engaged using the existing standard operating procedures and messages of your organization (this will be the baseline 'control group'), while other supporters would be engaged using procedures or messages that you have modified to include injustice, efficacy, and identity elements[7] (the 'treatment group'). Comparing these groups of supporters on the outcome of interest (such as action taking rate) will determine which approach was most effective. We are happy to provide a more detailed template research design if that will aid in preparing your proposal. However, if you would like to propose an alternate research method (such as a survey of your supporters, or interviews or focus groups with them), we are open to considering other approaches.

[1] We are drawing here on the Social Identity Model of Collective Action (SIMCA), originated in a paper by in 2008 by Martijn van Zomeren, Tom Postmes, & Russell Spears, "Toward an integrative social identity model of collective action: A quantitative research synthesis of three socio-psychological perspectives".

[2] While the time required for each project will vary, we expect that field partners will need to devote about 0.5 FTE of staff time during the main period of the work (July–November) to co-design, implement, and measure the research.

[3] Feel free to let us know in your proposal if there is a technical partner with whom you would like to work for this project.

[4] If you are unsure if you meet this threshold, feel free to reach out and we can discuss in more detail.

[5] Sharing new knowledge (such as the results of these projects) with the vetted membership of the Climate Advocacy Lab is central to our theory of change. However, we appreciate the potential need for sensitive information to not be publicly disclosed. When results from these projects are made available on the members-only section of the Lab's site, they can be marked 'Confidential', carrying the notice, "Not publicly available. Please contact the authors before sharing their findings outside of the Lab." Further,
any data (such as membership lists) involved in these projects will be used by the Lab or technical partners exclusively for the purpose of this project and will remain strictly confidential.

[6] For example, if testing subject lines, this would be the size of your email list and how often you send; if testing conversation plans for 1:1s with volunteers, this would be the number of those conversations you expect to have, August–September).

[7] If your standard procedures already employ one or more of these elements, the test could focus on the element(s) that are not standard for you, or alternatively, could evaluate if removing these elements has a negative effect.