



## *Environment Program – Climate Initiative*

Preliminary Form for Multi-Organization Applicant for  
Request for Proposal (RFP): Aligning Passive Asset Management with Paris  
Climate Goals

### Instructions

Please refer to the main RFP prompt document, *Environment Program Request for Proposal: Aligning Passive Investment with Paris Climate Goals*, for RFP purpose and context.

1. Join an informational call to learn more about the RFP and ask questions. Please register using this link: <https://hewlettfrp.eventbrite.com>  
Time and date:  
  - Thursday, 6 February 2020*
  - 8:00-9:00 AM PST (5:00 - 6:00 PM Central European Time)*
  - 4:00-5:00 PM PST (8:00 - 9:00 AM China Standard Time on Friday, 7 Feb)*
2. To apply, please complete the form below and email it to [climatefinance@hewlett.org](mailto:climatefinance@hewlett.org) by 11:59 pm PST on Thursday, 26 March 2020.
3. Multi-organization applicants (also referred to as partnerships) should submit one application as a group.

### Partnership applicant #1

Organization legal name, address and website	
Organization type (e.g. charitable organization/academic/for-profit)	
Country of incorporation	
Primary contact name, title, phone and email	
Organization/program leader	

2019 budget	
Number of staff	
Current funders/customers	

<b>Partnership applicant #2</b>	
Organization legal name, address and website	
Organization type (e.g. charitable organization/academic/for-profit)	
Primary contact name, title, phone and email	
Organization/program leader	
2019 budget	
Number of staff	
Current funders/customers	

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<b>Partnership applicant #3</b>	
Organization legal name, address and website	
Organization type (e.g. charitable organization/academic /for-profit)	
Primary contact name, title, phone and email	

Organization/program leader	
2019 budget	
Number of staff	
Current funders/customers	

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<b>Partnership applicant #4</b>	
Organization legal name, address and website	
Organization type (e.g. charitable organization/academic/for-profit)	
Primary contact name, title, phone and email	
Organization/program leader	
2019 budget	
Number of staff	
Current funders/customers	

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<b>Basic Requirements</b>
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Check all that apply:

- The work proposed is centered on generating solutions to the climate problems associated with passive investing
- The organizations are based in or focused on capital domiciled in the United States, European Union, and/or China

### **Key Criteria 1: Address Key Barriers or Solutions**

In 400 words or less, please address the following:

- What barrier(s) or solution(s) is the project seeking to address?
- How will addressing this barrier or solution (a) achieve a charitable purpose (such as environmental preservation); and (b) help solve the climate problems associated with passive investing?

### **Key Criteria 2: Impact**

In 400 words or less, please address the following:

- What is the long-term outcome, or change in the world, you expect to see from this project?
- What outcomes do you expect to see as a result of this project in the short-term (e.g. over the next 6 months, 12 months)?
- How will you determine if your work is on track to achieve the impact you are seeking to create? What indicators or metrics will you be tracking?

### **Key Criteria 3: Strategy**

In 500 words or less, please address the following:

- Please outline your strategy for this project, answering the following questions as relevant to your initiative.
  - What interventions or actions are you planning during the execution of this project over this funding period?
  - What key audiences are you seeking to reach?

- Who are the critical players or partners you will need to succeed?

#### **Key Criteria 4: Diversity Equity and Inclusion**

In 300 words or less, please address the following:

- How does this project's approach add to the diversity of voices and perspectives engaged on the passive asset management problems?
- Will this project engage or uplift key voices that have historically been marginalized or under-represented in this space?

#### **Key Criteria 5: Scalability**

In 300 words or less, please address the following:

- How are you currently thinking about scale with regard to this project in the shorter term, and in the longer term?
- Does this project have the potential to scale rapidly if proven effective? And if so, what is the path to scale (e.g. network effect, force multiplication, influence on media narrative, access to influential actors...)?

#### **Key Criteria 6: Why You**

In 300 words or less, please address the following:

- Why is this group of organizations uniquely placed to do this work?

## Key Criteria 7: Demographic Survey

The William and Flora Hewlett Foundation embraces the importance of and seeks to promote the values and practice of equity, inclusion, and diversity in our workforce, our culture, and our grant-making. As affirmed in our Guiding Principles, “we care about and hold these values essential both because this is the right thing to do and because it is the smart thing to do.”

If your organization has not conducted a voluntary organizational survey of race/ethnicity and gender in more than one year, we encourage you to undertake this effort before completing this survey for the Hewlett Foundation.

**This demographic survey has no impact on current or future funding.** It is intended to serve as an information-gathering exercise by which we can learn more about our potential funding recipients. This survey will be received and reviewed by a third party and data will be aggregated for the foundation, so to avoid any bias. The foundation will receive the aggregated data after making its funding decisions related to this RFP. The survey data will not be shared publicly.

*Each organization in the multi-org application should submit their own survey.*

Please follow this link to complete the survey:

<https://www.surveymonkey.com/r/AssetRFPDemographics>