

Open Society Institute - U.S. Programs
Request for Proposals
**2010 Technical Assistance Initiative to Strengthen Field and
Grantee Capacity in Challenging Times**

The Open Society Institute's U.S. Programs is seeking a consultant or consultants to assist in developing and implementing a special Technical Assistance Initiative for a cohort of grantees during the year 2010.

Background Information

The Open Society Institute's U.S. Programs is working to build a vibrant society that invites all people to participate fully in civic, economic, and cultural life. U.S. Programs supports grantmaking, programming, and policy initiatives that:

- Build an inclusive society that increases opportunity for all while addressing the unique struggles faced by women, people of color, immigrants, poor people, and lesbian, gay, bisexual and transgender Americans.
- Promote civic participation and develop new leaders, especially among communities that have been historically underrepresented.
- Ensure fair criminal justice, immigration, and national security policies, and reduce the over-reliance on incarceration and harsh punishment.
- Increase the transparency, integrity and accountability of institutions vital to open society.

The economic crisis has created a distinct set of challenges for OSI's U.S. Program's grantees, that are above and beyond the regular challenges that arise in a given program year. Many of our grantees are experiencing funding cuts at the programmatic and operational levels, have had to adjust or scale back their programs, respond to increased demand for services from their constituents, or make serious reductions in their staff and operations. Most lack, as well, the internal capacity and expertise to respond to these challenges creatively and effectively – particularly in the areas of **sustainability planning, financial planning/management and fundraising**.

In light of this situation, U.S. Programs has decided to support a special Technical Assistance Initiative that will, throughout 2010, seek to sustain and strengthen grantees in fields that we are trying to advance, so that they can continue to make progress with their social justice work.

We expect that the emphasis of this Technical Assistance Initiative will be placed on supporting key *fields/sub-fields* of concern to OSI, rather than focusing on an unrelated collection of individual organizations. We foresee that this field strengthening approach

will enable us to provide grantees with individual and collective technical assistance support and peer learning opportunities in the areas of financial planning/management and fundraising. We also expect to make small general support grants to help off-set the costs associated with grantees participation in the initiative. We expect the consultant(s) to assist us determine which fields we should prioritize and the number of grantees that this initiative will target.

The Technical Assistance Initiative will be coordinated jointly by U.S. Programs' Strategic Opportunities Fund (SOF) and Grantmaking Operations (GO).

Scope of Work

This RFP aims to identify a consultant or consultants with the credentials, experience and capacity to conduct the following work:

Collect, analyze and present information to help determine the focus and reach of the Technical Assistance Initiative:

- Conduct a field scan, among the different fields in which U.S. Programs works, to identify the fields and geographic regions in the U.S. that have been most affected by the economic crisis, as well as new nonprofit business models that may be better positioned to help nonprofit organizations adapt to the new economic reality. In order to do this, the consultant(s) will use research data that has already been produced and made available by themselves or other organizations. The consultant(s) will cross-reference this data with information on U.S. Programs' fields of work to recommend the fields the Technical Assistance Initiative could focus on.
- Work with SOF and GO to determine criteria to select the cohort of grantees that will participate in the Technical Assistance Initiative. We anticipate selecting grantees through a closed process (internal, non-competitive).

Develop an implementation and evaluation plan

- Work with SOF and GO to develop a work plan to guide the implementation of the Technical Assistance Initiative.
- Work with SOF and GO to develop a plan to evaluate the results of the initiative.
- Toward the end of the initiative, conduct a learning session with U.S. Programs staff to share results and lessons learned.

Design and provide technical assistance support and peer learning opportunities to participating grantees

- Work one-on-one with grantees to help them assess their situation and create a plan to overcome their current challenges and adjust to the new economic reality.
- Design and facilitate collective hands-on capacity building and peer learning opportunities.

- Participate in check-ins with SOF and GO (frequency to be determined)

How to Submit a Proposal

Interested consultants/firms should submit the following, no later than 5:00pm on April 14th, 2010, to Cristina Parnetti, Manager of Grantmaking Operations, U.S. Programs, at cparnetti@sorosny.org :

1. A proposal describing your qualifications and your approach to the project. Please include the following information:
 - a. how you would carry out the tasks described above and a possible timeframe;
 - b. your experience working with other philanthropic organizations to build the capacity of their grantees and a brief outline of the scope of work;
 - c. your experience working in different geographies throughout the U.S. (local and state level) and with organizations of different sizes and needs.
2. An estimate of the fees to be charged and an estimate of the expense breakdown that would be incurred.
3. Names and qualifications of all the consultants that would be involved in the project and their respective responsibilities.
4. References: names, contact information and a brief project description for 3-5 nonprofit organizations or philanthropies who have been your clients in the last 18 months, whom we can call as references.

We will hold an informational conference call with interested applicants on Monday, March 29th from 11am to 12pm. If you would like to participate, please let Cristina Parnetti know at cparnetti@sorosny.org and she will share call-in information. To help us organize the topics to be discussed during the call, we will appreciate if you can email your questions ahead of time.

Interviews with finalists will be conducted the week of May 3rd.