

TERMS OF REFERENCE
for contracting a Consultant (individual or company)
to assist with identifying a grants management software solution

Location: Remote

Type of Contract: Consultancy Contract

Languages Required: English

Starting Date: July-August 2020

Duration of Initial Contract: 6 months

Background

The Open Society Foundations (OSF), founded by George Soros, are the world's largest private funder of independent groups working for justice, democratic governance, and human rights. George Soros opened his first international foundation in Hungary in 1984. Today, the Open Society Foundations support a vast array of projects in more than 120 countries, providing hundreds of grants every year through a network of national and regional foundations and offices.

Grants are awarded to groups and individuals that work on the issues we focus on - promoting tolerance, transparency, and open debate. We also engage in strategic human rights litigation and impact investing, while incubating new ideas and engaging directly with governments and policymakers through advocacy to advance positive change.

Building long-term relationships of trust with the entities we support and understanding their health, effectiveness, strengths, and the challenges they face, is an integral part of the Open Society Foundations' organization-centered approach to grant making. The vast majority of our grants are awarded to organizations that we approach directly. The kind of grants any Open Society program or entity makes depend on its strategy and its vision of how to use its budget most effectively.

The Open Society Foundations form a global network of entities and programs committed to local knowledge and national expertise. The Open Society Foundations (OSF) network includes National and Regional Foundations, as well as programs with regional or global reach, operating in more than 120 countries, including hubs in Europe and the United States.

Purpose

OSF is seeking proposals from experienced and qualified individuals or companies (henceforth: "Consultant") to assist with identifying of a software solution for managing grants, which will be referred to as the Grants Tracking System (GTS). The identified software solution will be used separately by 8-10 National Foundations. Each foundation is a separate entity located in a country, though all are a part of a larger OSF network.

The consultant will work with a Working Group that consists of 1-2 representatives from each National Foundation (NF).

In your proposal, please provide details of the services you can offer and the rates/prices to perform these services. We are particularly interested in understanding why you believe you are the best placed Consultant to meet our requirements and what sets you apart from your competitors.

Objectives

The assignment of the Consultant will be to identify a software solution to support the grant making workflows that make up the larger Grants Management work stream of each foundation. The Consultant will carry out this assignment taking into account the expectations that each individual National Foundation (NF) has from the software solution that should be identified (see Annex 1). The identified solution will be used by NFs that are currently using Serenic Navigator (Microsoft Dynamic NAV) as accounting system.

Description of Responsibilities

The Consultant will:

- Develop a work plan based on the given scope. The work plan should be agreed with the Working Group.
- Review the list of “system expectations” outlined in Annex 1. Suggest clarifications and improvements and work with the Working Group to create an updated requirements list. Facilitate a process for prioritizing the requirements on this list. The end result is a prioritized list of requirements for use in the software selection.
- Conduct a search of possible grants management software packages and narrow it down to 5-7 options to be evaluated by the Working Group. Organize online demo presentations of the preselected software pieces.
- Instruct and advise the Working Group members on industry-specific considerations that should be taken into account during the software selection and assessment process.
- Prepare the evaluation scorecards that shall be filled out by the Working Group members after presentations of preselected software.
- Instruct the Working Group on how to work with scorecards during the evaluation process.
- Process scorecards filled out by the Working Group members for each evaluated software.
- Help the Working Group to reach an agreement on the selected software.
- Assist the Working Group and OSF in negotiations with the Vendor of the selected software.
- Develop guidelines for NFs involved in the project on how to prepare their staff and IT infrastructure to ensure a smooth implementation of the selected software.

Information on Working Arrangements

- The Consultant will closely communicate with OSF representatives as well as the Working Group (National Foundations) representatives.
- The Consultant will work remotely (will not need to travel and work in a foundation workplace).
- The initial contract would be for 6 months (July 2020 – December 2020).

- The contract will be signed with one of OSF entities (National Foundations) on behalf of all other members of the Group.
- The Consultant is expected to be available for web-based meetings as needed and be in reliable email contact.
- The Consultant will be given access to relevant information necessary for the execution of the tasks under this assignment.
- The Consultant will be responsible for providing all the necessary working tools (i.e. laptop, internet, phone, scanner/printer, specific software if required, etc.) and must have access to reliable internet connection.
- Given the global online consultations to be undertaken during this assignment, the Consultant is expected to be reasonably flexible with the availability for such consultations taking into consideration different time zones.
- Payment for services will be made upon satisfactory submission of outputs, certification of payment form, and acceptance and confirmation by the Advisor delegated by the Working Group.

Basis of Award (Best Value Determination)

OSF will review all proposals. Only those applications, which are compliant will be considered and evaluated. OSF will make an award based on the technical and cost evaluation criteria stated above and select the offeror whose proposal provides the best value to OSF. OSF may also exclude an offer from consideration if it determines that an Offeror is "not responsible", i.e., that it does not have the management and financial capabilities required to perform the work required.

Evaluation points will not be awarded for cost. Cost/price will primarily be evaluated for realism and reasonableness.

Preselected applicants may be contacted for a discussion regarding the technical or financial proposal. OSF may make an award to a higher priced offeror if a determination is made that the higher technical evaluation of that offeror merits the additional cost/price.

Cost realism will be based on considerations such as the following:

- Are proposed costs realistic for the services to be performed?
- Do the costs reflect a clear understanding of the scope of work?
- Does the proposal meet at a minimum the OSF requirements/specifications?
- Are the costs consistent with the various elements of the offeror's technical proposal?

OSF may make an award to an Offeror without discussions. Therefore, the initial offer must contain the Offeror's best price and technical terms.

Documentation to be submitted

- A Technical Proposal with a brief description of why the offeror considers himself/herself as the most suitable for the assignment and a detailed clear methodology on how he/she will approach and complete the assignment.
- A Financial Proposal that indicates the all-inclusive fixed total contract price, supported by a breakdown of costs.

Detailed instructions for companies – Annex 1, for individuals – Annex 2.

Language of the bid:

The bid, as well as all correspondence and documents relating to the bid shall be written in the English language.

Application Process:

All interested applicants are required to provide a technical and financial proposal, by email to the Soros Foundation-Moldova by 9.00pm GMT Friday, June 26, 2020. Please make sure you receive a confirmation email, otherwise do not hesitate to request a confirmation from the contact person.

The information, which the applicant considers confidential, if any, should be clearly marked as such.

Contact address for electronic application submissions: gts@soros.md

The contact for this call for proposals is Dumitru Chitoroaga – dchitoroaga@soros.md

Annex 1. Instructions for Companies

Technical proposals shall include the following contents:

1. Company Information:

Legal Company Name:

Company Contact (address, phone, e-mail)

Corporate information: (Company's mission statement)

Organization structure: (include description of those parts of your organization that would be involved in the performance of the work)

Relevant experience: (how could your expertise contribute to OSF and NF's needs for the purpose of this ToR?) Please attach reference and contact details

2. Technical Approach - Description of the proposed services, which meet or exceeds the stated technical specifications or scope of work. The proposal must show how the Offeror plans to complete the work and describe an approach that demonstrates the achievement of timely and acceptable performance of the work.

3. Management approach – Description of the Offeror's staff assigned to the project. The proposal should describe how the proposed team members have the necessary experience and capabilities to carry out the Technical Approach.

4. Past Performance – Provide a list of at least three (3) recent awards of similar scope and duration. The information shall include the legal name and address of the organization for which services were performed, a description of work performed, the duration of the work and the value of the contract, description of any problems encountered and how it was resolved, and a current responsible and knowledgeable representative of the organization, their official email address and official contact phone number.

5. Risks – Identify what you consider to be the key risks and challenges for the Open Society Foundations network in this project.

6. References – At least three references specifically referencing assignments of similar nature to this scope.

Financial Proposal:

- Please provide a full breakdown of proposed costs in USD showing all applicable taxes.
- Please describe any discounts in you offer for not-for-profit organizations such as OSF

Technical Evaluation Criteria

Each proposal will be evaluated and scored against the evaluation criteria and evaluation sub-criteria, which are stated in the table below. Cost/Price proposals are not assigned points, but for overall evaluation purposes of this RFP, technical evaluation factors other than cost/price, when combined, are considered approximately equal to cost/price factors.

	Evaluation Criteria	Points
1.	Technical Approach	50 Points
2.	Management Approach	30 Points
3.	Experience	15 points
4.	Risks	5 points
	Total	100 Points

Annex 2. Instructions for individuals

Corporate:

- Displays cultural, gender, religion, race, nationality and age sensitivity and adaptability.
- Treats all involved parties fairly without favoritism.
- Fulfils all obligations to gender sensitivity and zero tolerance for sexual harassment.

Functional Competencies:

Knowledge Management and Learning:

- Willingly shares knowledge and experience.
- Actively develops substantive understanding and experience in one or more knowledge areas.

Communication:

- Communicates effectively in writing and orally to a varied and broad audience in a simple and concise manner.

Professionalism:

- Capable of working in a high-pressure environment with sharp deadlines, managing many tasks simultaneously.
- Able to handle a large volume of data and reports accurately and thoroughly, with great attention to detail.
- Excellent analytical and organizational skills.
- Exercises the highest level of responsibility and is able to handle confidential and politically sensitive issues in a responsible and mature manner.

Teamwork:

- Works well in a team.
- Projects a positive image and is ready to take on a wide range of tasks.
- Focuses on results for the client.
- Welcomes constructive feedback.

Required Skills and Experience:

Education (15 points max.)

- Higher Education in computer sciences, software engineering, programming or other closely related field is required.

Experience:

- At least 7 years of experience in software architecture design and implementation (20 points max.).
- Excellent knowledge of design and implementation on relational database level, SQL (15 points max.).
- Strong experience with modern grants management systems (30 points max.).
- Experience with grants management process and databases an advantage (10 points max.).

Case Studies/ References:

- Please provide details of any previous experience you have had working with organizations similar to OSF and/ or relevant case studies (5 points max.).
- Provide two client references (we will not contact any client referees without your prior permission).
- Please list any certificates/ accreditations you hold which are relevant to your industry.

Risk Management

- Please identify what you consider to be the key risks and challenges for the Open Society Foundations network in this project. *(5 points max)*

Language Requirements:

- Excellent oral and written communication skills in the English language.

Financial proposal:

- Please provide a full breakdown of proposed costs in USD showing all applicable taxes.