

**TERMS OF REFERENCE**  
**for contracting a Consultant**  
**to assist with identifying a grant management software solution**

**Location:** Remote

**Type of Contract:** Consultancy Contract

**Languages Required:** English

**Starting Date:** April 2019

**Duration of Initial Contract:** 6 months

**Background:**

The Open Society Foundations, 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.

Every year, the Open Society Foundations give thousands of grants 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 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. Open Society Foundations 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:**

The OSF is seeking proposals from experienced and qualified individuals (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 Open Society Foundations network.

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

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's 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 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 on-line 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 Working Group members for each evaluated software;
- Help the Working Group to reach an agreement on the selected software.
- assist 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 be home-based (will not need to work in a foundation space);

- The initial contract would be for 6 months ( April 2020 – September 2020);
- The contract would 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 her/his own work station (i.e. laptop, internet, phone, scanner/printer, specific software if required, etc.) and must have access to reliable internet connection;
- Given the global on-line consultations to be undertaken during this assignment, the Consultant is expected to be reasonably flexible with his/her availability for such consultations taking into consideration different time zones;
- Payment for services will be made upon satisfactory submission of outputs, a detailed time sheet, and certification of payment form, and acceptance and confirmation by the Advisor delegated by the Working Group.

**Competencies:**

**Corporate:**

- Demonstrates integrity by modelling the OSF’s values and ethical standards;
- 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** *(10 points max.)*

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

**Experience:**

- At least 10 years of experience in software architecture design and implementation *(10 points max.)*;
- Excellent knowledge of design and implementation on relational database level, SQL *(10 points max.)*;
- Strong experience with modern grants management systems *(20 points max.)*;
- Experience with grants management process and databases is an advantage *(20 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 *(2 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.

**Language Requirements:**

- Excellent oral and written communication skills in English language.

**Risk Management**

- Please identify what you consider to be the key risks and challenges for Open Society Foundations network in this project.

**Cost:**

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

**Evaluation method:**

- Only those applications, which are compliant will be considered and evaluated;
- Offers will be evaluated based on the criteria outlined in the competencies and experience
- Applicant receiving the highest score will be awarded the contract.

**Documentation to be submitted:**

- A technical proposal with brief description of why the individual considers him/herself as the most suitable for the assignment, and a detailed clear methodology, on how he/she will approach and complete the assignment;
- The technical proposal should also contain personal CV, indicating education background/ professional qualifications, all past experience, as well as the contact details (email and telephone number) of the candidate and at least three (3) professional references;
- Financial Proposal that indicates the all-inclusive fixed total contract price, supported by a breakdown of costs.

**Language of bid:**

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

**Application Process:**

All interested applicants are required to provide a technical and financial proposal of no more than five pages, by email to Soros Foundation Moldova by 9.00am GMT Monday 30 March 2020. Please make sure you receive a confirmation email, otherwise do not hesitate to request a confirmation from the contact person.

Contact address for electronic application submissions: [gts@soros.md](mailto:gts@soros.md)

The contacts for this call for proposals are:

1. Dumitru Chitoroaga – [dchitoroaga@soros.md](mailto:dchitoroaga@soros.md)