

# Request for Proposal

## Facilitation of CRS Strategic Change Platform 5 (SCP5)

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| <b>Consultancy Title</b>                 | Facilitation and Write-Up of Strategic Change Platform Influence Strategy Development                   |
| <b>Solicitation RFP number</b>           | US8341.05.2024  |
| <b>Location</b>                          | Remote (with the possibility of in-person meetings at CRS' H.Q. in Baltimore, MD, USA)                  |
| <b>Anticipated Contract Duration</b>     | June 18, 2024 – December 5, 2024 (5.5 months)   |
| <b>Anticipated Level of Effort</b>       | 34% of full time and 42 Billable Days   |
| <b>Procurement Contact Person</b>        | Andrea Wilson-Taylor ( <a href="mailto:andrea.wilson-taylor@crs.org">andrea.wilson-taylor@crs.org</a> ) |
| <b>Due date for clarifying questions</b> | May 28, 2024 [11:59 PM EST]   |
| <b>Due date for full proposal</b>        | June 4, 2024 [11:59 PM EST]   |

### I. Purpose

The purpose of this Scope of Work is to describe the roles, responsibilities, and deliverables of a consultant who will facilitate the development and write-up of a written global influence strategy and related action plan for CRS' Strategic Change Platform 5 (SCP5) – *Strengthening Families for Thriving Children (2024-2030)*, global influence strategy and related action plan for CRS' Strategic Change Platform 5 (SCP5) – *Strengthening Families for Thriving Children (2024-2030)*.

### II. Background

As part of its Vision 2030 agency strategy, CRS is investing in six strategic change platforms to achieve results at scale. One of these key strategic change platforms is the Strengthening Families for Thriving Children Strategic Change Platform 5 (SCP5). SCP5 seeks to ensure that all children live in safe and nurturing families. By empowering families to care for their children and meet their protection, food, education, and healthcare needs, we can address the root causes of family separation and create more resilient communities. CRS has a unique capacity and responsibility to improve family strengthening and care systems and position CRS – and the greater Catholic Church – as an advocate for keeping children in safe and nurturing family care.

A key objective of SCP5 is to influence a global movement in the way we care for vulnerable children so that commitments from key government, civil society, and faith actors at the national, regional, and global levels are shifted -- through collaboration and informed by learning and evidence – towards promoting family care and reducing reliance on residential care. Actors include national/sub-national governments, regional/global institutions/agencies, faith-based organizations, coalitions/networks, donors, media, associations/groups of people with lived experience (PWLE), other members of civil society, and the private sector.

The platform is managed by a small CRS team and is implemented across CRS country programs. It works around the world to influence other countries, regions, and global actors to change practices, policies, and resources in support of family strengthening and family care. One of the platform's flagship initiatives, *Changing the Way We Care*<sup>SM</sup> (CTWWC), amplifies a global movement to prevent children from entering orphanages and to place children currently in orphanages in safe and nurturing families. Since

2018, the initiative has been active in three primary demonstration countries (Kenya, Guatemala, and Moldova), with additional activities in India and Haiti. Additionally, CRS has expanded its family care work to Uganda, Zambia, Malawi, Burkina Faso and Bosnia and Herzegovina with a range of government and faith-based actors. children currently in orphanages in safe and nurturing families. Since 2018, the initiative has been active in three primary demonstration countries (Kenya, Guatemala, Moldova) with additional activities in India and Haiti. Additionally, CRS has expanded its family care work to Uganda, Zambia, Malawi, Burkina Faso and Bosnia and Herzegovina with a range of government and faith-based actors.

Currently, SCP5 is building on CTWWC's previous work establishing an influence strategy to ensure that commitments are shifted in international development practices and resources redirected (financial, human, material) towards promoting family care and reducing reliance on orphanages globally. SCP5 needs to further identify, navigate, and support a complex system of actors that can all play a role in building and strengthening childcare and protection systems. This involves working with stakeholder groups at global, regional, and national levels, focusing on a broad range of actors, including faith, government, and civil society.

A stakeholder group of particular importance is that of the Roman Catholic Church, given CRS' role in the Church's universal mission, charged with carrying out the commitment of the U.S. Conference of Catholic Bishops to promote human development outside of the U.S. *and* serve Catholics in the U.S. as they live their faith in solidarity with those around the world. In recent years, CRS and CTWWC have made significant progress in advancing family care and care reform priorities by working with Catholic leaders and entities at the local, national, regional, and global levels, particularly in Africa and Latin America.

In addition to working across external stakeholders and organizations, an effective SCP5 influence strategy will require a good deal of cross-departmental work within CRS to fully leverage all parts of the agency. As such, the SCP5 influence strategy will also include goals and activities internal to CRS as a global agency, working in over 100 countries with past and current partnerships and work that has supported residential care for children.

An effective strategy will capitalize on CRS' footprint and expertise and harness and build the capacity of internal contributors, including those of CTWWC, SCP5 programs, and other relevant sectors, including orphans and vulnerable children (OVC). The global influencing strategy will need to be designed to be feasible within the CRS forecasted resource and budget range, as well as scalable and adaptable to the local context. It also will propose additional elements to pursue if and when more funding is available.

### **III. Key Inputs**

The consultant first will facilitate a process to guide SCP5 in developing an ambitious yet realistic, written global internal and external influence strategy and related action plan through FY2030 and then will write a strategy and action plan based on this facilitated process. They will identify key inputs for the advocacy and influence strategy and action plan, including (but not limited to):

1. Overall key influence goal.
2. Specific influence objectives that are achievable in the time period.
3. Key audiences (i.e., decision-makers and influencers whom the strategy needs to target for

- each specific objective).
4. Theory of change or impact chain(s) linking short, intermediate, and long-term outcomes (changes in the key audiences) for the influence objectives.
  5. Factors constraining and enabling change related to specific objectives.
  6. Indicators linked to the impact chain(s).
  7. Individuals/organizations/coalitions (i.e., possible allies) working to achieve the goal and objectives and potential avenues for coordination/collaboration.
  8. Specific tactics/approaches and actions related to achieving outcomes.
  9. Potential risks.

SCP5 anticipates the following activities/milestones with time estimates for each, although the consultant may propose an alternative process and/or timeline to achieve the deliverables in an effective and efficient manner.

#### IV. Specific Activities, Timelines, and Levels of Effort

The anticipated period of performance is June 18, 2024, to December 5, 2024, with 42 billable days anticipated to complete the assignment.

Below is a list of specific activities required to produce the deliverables, along with the anticipated number of working/billable days it will take to complete each activity.

| Activity Number | Activity   | Date(s) of Performance<br>[Note to bidder: Please enter the proposed date or dates range for each task based on this total period of performance.] | Anticipated Number of Billable Days<br>[Note to bidder: If, in your assessment, the number of billable days needed is less than or exceeds 42 days, please explain in your proposal.] | Bidder Anticipated Number of Billable Days |
|-----------------|--|--|---|--|
| 1               | Meet with CRS' SCP5 Influence Working Group for an orientation to SCP5 and CTWWC. Develop a draft work plan and share it with CRS for feedback. Meet with CRS' SCP5 Influence Working Group for an orientation to SCP5 and CTWWC. Develop a draft work plan and share with CRS for feedback. |  | 1   |  |
| 2               | Complete document review to inform the development of key informant interview guides.  |  | 2   |  |
| 3               | In collaboration with CRS, identify priority internal and external stakeholders for key  |  | 2   |  |

|    |  |  |    |  |
|----|--|--|----|--|
|    | informant interviews (KIIs) and determine interview questions/design. Develop key informant interview guides/tools.  |  |    |  |
| 4  | Complete 15-20 key informant interviews (KIIs) with relevant CRS & CTWWC staff, as well as priority external stakeholders in small groups and/or individually  |  | 10 |  |
| 5  | Based on the KIIs, draft a landscape analysis report that includes recommendations to address key gaps/opportunities; share with CRS for feedback  |  | 4  |  |
| 6  | Finalize the landscape analysis report that incorporates CRS' feedback from SCP5 and select CRS country/regional staff   |  | 1  |  |
| 7  | In collaboration with CRS, co-design a virtual meeting series to (1) validate the landscape analysis and recommendations with an advisory group (made up of SCP5 and select CRS country/regional staff) and (2) facilitate group discussions to inform the key priorities, pillars and major elements of a SCP5 Influence Strategy and Action Plan. Activities include developing the meeting series agenda/planning documents and preparing/organizing presentations. |  | 2  |  |
| 8  | Co-facilitate virtual meeting series by serving as lead and support facilitator for sessions, taking and organizing notes, and leading facilitated discussions to meet objectives., taking and organizing notes, leading facilitated discussions to meet objectives.   |  | 4  |  |
| 9  | Draft a detailed outline of a proposed SCP5 Influence Strategy and solicit feedback from CRS   |  | 1  |  |
| 10 | Draft a SCP5 Influence Strategy and solicit feedback from CRS  |  | 5  |  |
| 11 | Finalize the SCP5 Influence Strategy   |  | 2  |  |

|    |   |  |           |  |
|----|---|--|-----------|--|
| 12 | Prepare and facilitate a validation workshop of the SCP5 Influence Strategy to ensure key stakeholders are in agreement with the strategy proposed and inform the development of an Action Plan |  | 2         |  |
| 13 | Draft SCP5 Influence Action Plan and solicit feedback from CRS  |  | 4         |  |
| 14 | Finalize the SCP5 Influence Action Plan   |  | 2         |  |
|    | <b>Total</b>  |  | <b>42</b> |  |

**V. Period of Performance**

The anticipated period of performance is June 18, 2024, to December 5, 2024 (anticipated 42 billable days).

**VI. Deliverables**

Below is a list of the deliverables the prospective Consultant will produce and the estimated due date for each Deliverable.

| Deliverables   | Estimated due dates |
|--|---------------------|
| 1. Draft Work Plan   | June 24, 2024       |
| 2. Key informant interview (KII) tool  | July 5, 2024        |
| 3. Draft of landscape analysis report with recommendations                           | August 19, 2024     |
| 4. Finalized landscape analysis report with recommendations                          | September 3, 2024   |
| 5. Detailed agenda and presentation materials (as needed) for virtual meeting series | September 11, 2024  |
| 6. Detailed outline for SCP5 Influence Strategy                                      | September 23, 2024  |
| 7. Draft SCP5 Influence Strategy   | October 4, 2024     |
| 8. Final SCP5 Influence Strategy   | October 25, 2024    |
| 9. Draft SCP5 Influence Action Plan for implementing strategy                        | November 14, 2024   |
| 10. Final SCP5 Action Plan for implementing the strategy                             | November 29, 2024   |

All deliverables will be subject to review and approval by CRS. SCP5 commits to providing timely reviews within five (5) business days of receipt of each deliverable.

**VII. Location of Performance:**

A greater percentage of the consultancy will be conducted virtually. However, there may be opportunities for in-person sessions and/or Key Information Interviews (KIIs) with CRS staff and/or key stakeholders at CRS' headquarters in Baltimore, Maryland, if the need is determined.

**VIII. Key Working Relationships**

|  |                                     |
|--|-------------------------------------|
| Sr. Program Manager, Catholic Engagement, SCP5 | Technical Director, Social Services |
|--|-------------------------------------|

It is expected that the Sr. Program Manager and the consultant will have regular check-in meetings to support the planning of consultancy activities and the preparation of the deliverables.

In addition, the consultant is expected to work with the following individuals and teams internal to CRS (some of these may be limited to the Key Information Interviews/information gathering phase).

1. SCP5 Influence Strategy Working Group (composed of 8 CRS SCP and CTWWC staff)
2. CRS Technical Director, Social Services (currently Acting SCP5 Lead) and possibly CRS' SCP5 Executive Champion
3. CTWWC Senior Management Team and Technical Leadership
4. SCP5 Internal Communications Team
5. CRS relationship managers with potential strategy targets (i.e., CRS' U.S.-facing division: Mission & Mobilization (M2) and CRS overseas' regions for religious conferences)
6. CRS Strategy and Organizational Development (SOD) and CRS' Catalyzing Scale through Evidence (CASCADE) teams.

#### **IX. Required Application Components**

1. Cover letter, which describes a brief summary of the approach demonstrating qualifications in undertaking the Scope of Work. This summary should highlight how the applicant will complete the deliverables. (Document cannot exceed 4 pages single-spaced.)
2. Completion of separate attachment, Annex I, which is also the table found under Section IV *Specific Activities, Timelines, and Levels of Effort*.
3. (a) Compensation rate per day; (b) Total cost for completing the assignment; (c) Confirmation of the level of effort (i.e., number of billable days).
4. Resume/CV demonstrating qualifications and a list of clients/projects supported in relevant efforts.
5. 1-2 comparable writing samples.
6. Contact information for three professional references, with the following details about the references: (a) name, (b) position, (c) company, (d) phone number, (e) email address, and (f) city, state, country.

#### **X. Qualifications**

##### **Required:**

1. Master's degree or its international equivalent in policy advocacy and communications, public health, international development, social work, sociology, or another related discipline.
2. Demonstrated experience in developing effective influence strategies/plans.
3. Demonstrated ability to synthesize feedback from multiple sources.
4. Excellent facilitation skills and ability to facilitate virtual workshops.
5. Excellent writing skills.
6. Familiarity with Catholic Church structures and practices.

##### **Preferred:**

1. Experience and familiarity with children's care reform, family strengthening, and child protection work.
2. Experience working with the Catholic Church, particularly the Church of the United States and the Vatican.

**XI. Clarifying Questions and CRS Response**

Prospective bidders may submit any clarification questions by singular request to [andrea.wilson-taylor@crs.org](mailto:andrea.wilson-taylor@crs.org) by May 28, 2024 [11:59 PM EST]. The solicitation name "US8341.05.2024: Facilitation and Write-Up of Strategic Change Platform Influence Strategy Development" must be included in the Email Subject Line. Questions submitted after the deadline will not be accepted. Responses will be provided to any known prospective bidders on May 31, 2024.

**XII. Proposal Submission**

All proposals must be sent to [andrea.wilson-taylor@crs.org](mailto:andrea.wilson-taylor@crs.org) no later than June 4, 2024 [11:59 PM EST for electronic submission]. The solicitation name "US8341.05.2024: Facilitation and Write-Up of Strategic Change Platform Influence Strategy Development" must be included in the Email Subject Line.