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LESSONS LEARNED IN IMPLEMENTING A GRANTS PROGRAM IN INTERNATIONAL COOPERATION PROGRAMS IN MEXICO

THE EXPERIENCE OF THE USAID CIVIL SOCIETY ACTIVITY

A Technical Document on the Strengthening of Civil Society in Mexico

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This document is part of a collection of strategic documents created for USAID's Civil Society Activity, implemented by Social Impact, Inc (SI) and financed by the United Stated Agency for International Development (USAID). The content of these documents describes the approach and methodologies for the development of systemic capacities designed by CSA in order to guide more than forty Civil Society Organizations (CSOs) during their institutional strengthening, grant administration, and legal compliance. This document provides an overview of the Activity's experience navigating the Request for Proposal (RfP) process, outlining specific recommendations that International Cooperation Agencies can bear in mind when designing and disseminating a call for proposals, evaluating and selecting proposals, and when closing out the process. The entire compendium is a useful resource to strengthen CSOs. You can consult the entire collection on Social Impact's website: https://socialimpact.com/.

ABOUT USAID CIVIL SOCIETY ACTIVITY

Civil Society Activity (CSA) Mexico was a 4-year program funded by the U.S. Agency for International Development (USAID). CSA aimed to improve the sustainability of Civil Society Organizations (CSOs) to effectively implement their agendas on violence prevention, human rights protection and justice reform in Mexico. To this end, CSA focused on improving CSOs capacity to communicate and work collaboratively, increasing their connections with key stakeholders, strengthening their capacity to develop strategies in response to their changing environment and to their communities' needs and priorities, as well as improving CSOs access to knowledge and resources. The USAID Mexico Civil Society Activity was implemented by Social Impact (SI) Inc., in partnership with Fundación Appleseed.

ABOUT SOCIAL IMPACT

Social Impact (SI) is a management consulting firm that provides monitoring, evaluation, strategic planning, performance management and capacity building services to advance development effectiveness. SI's work helps to reduce poverty, improve health and education, promote peace and democratic governance, foster economic growth, and protect the environment. To achieve this, SI delivers consulting, technical assistance, and training services to government agencies, nongovernmental organizations, and foundations.

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Authors: Nohemí Paredes and Mario Carmona
Editorial Team: Brandon Melecio Fischer and Yolanda Talavera

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TABLE OF CONTENTS

EXECUTIVE SUMMARY 6

INTRODUCTION 9

THE APPROACH OF USAID CIVIL SOCIETY ACTIVITY 10

METHODOLOGY FOR THE DESIGN OF A REQUEST FOR PROPOSALS 14

REQUEST FOR PROPOSALS DESIGN 15

COMMUNICATION CAMPAIGN AND PROPOSAL RECEPTION 19

EVALUATION AND SELECTION OF PROPOSALS 21

24

REFERENCE 26

APPENDIXES 27

ACRONYMS

CEMEFI	Mexican Philanthropy Center (*Centro Mexicano para la Filantropía*)
CLA	Collaboration, Learning and Adaptation
CSO	Civil Society Organization
DOs	USAID Development Objectives
GIZ	German Corporation for International Cooperation *(Deutsche Gesellschaft für Internationale Zusammenarbeit)*
HICD	Human and Institutional Capacity Development
HR	Human Rights
ICA	International Cooperation Agencies
ISO	Intermediate Support Organizations
NUPAS	Non-U.S. Organization Pre-Award Survey
RFP	Request for Proposals
SI	Social Impact, Inc.
TEC	Technical Evaluation Committee
ToC	Theory of Change
USAID	United States Agency for International Development

EXECUTIVE SUMMARY

The present document integrates a selection of the main learnings and lessons through the experience of the USAID Civil Society Activity during the implementation of a funding and institutional strengthening program for Civil Society Organizations (CSOs) that addresses issues regarding human rights (HR), violence prevention and access to justice. CSA's four-year experience in funding, collaborating and strengthening partner CSOs has proven to be of great value and may shed light on new collaborative practices between International Cooperative Agencies (ICA) and CSOs, in order to promote sustainable results.

The theory of change on which the program design was based is centered on the hypothesis that strengthening the civil society sector locally has a direct impact in the improvement of the CSOs' capacity to influence the development agendas, including subjects like human rights defense, access to justice and violence prevention.

The role of CSOs in Latin America, just as in other parts of the world, is key to the exercising of rights and to promote a better quality of life for the population at large.

In the last several decades, CSOs have gained great importance in Mexico as they have become actors that not only collaborate with the State to promote the country's development, but they are also protagonists and generators of knowledge, methodologies, models for intervention, and proposals for innovative public policies, all of which have increased public attention concerning the most urgent and structural problems, such as serious violations to human rights, violence and access to justice.

However, paradoxically, while the job the CSOs perform is becoming more necessary, the environment in which they operate has also become more complex, requiring the organizations to develop capacities in order to adapt to change and be able to face new challenges.

In this context, the role of the International Cooperative Agencies (ICA) in Mexico becomes relevant and opportune. The role of ICAs, such as USAID, has gained a lot of traction due to the fact that today there are very few instances that provide support, including funding, technical assistance or other kind of resources for CSOs, in order for them to address subjects like human rights, violence, and justice in the country.

Considering this, it is worth exploring new routes for collaboration between ICAs and CSOs so that their relationship goes beyond simply awarding grants and ensuring CSO compliance with ICAs' regulations. The goal should be to create true alliances in order to create better conditions in which objectives can be met and in which results are shared between both parties.

In this regard, the lessons and learnings from CSA that are featured here can serve as an important contribution for the design of grants programs by ICAs. Taking this into consideration, a majority of the recommendations were mainly taken from the *Request for Proposals and Screening Process of CSOs*, given that it is at this point where it is considered relevant to incorporate the dynamics of a closer dialogue between the cooperation agency and the implementing CSO, in such a way that adaptability and feedback from CSOs to the ICAs on their objectives, strategies and financing mechanisms is

promoted. In this regard, the recommendations provided in this document make emphasis on the fact that, from the inception of a program, regardless of the cooperation agency, the probability of successful achievement of the objectives increases greatly when the design of the request for proposals process includes concrete and verified knowledge about the characteristics of the context where the program will be implemented, as well as about the strengths and weaknesses both of the CSOs and the other parties involved, along with the different topics with which the ICA works and are considered priorities.

Every grants program for CSOs that has the ultimate goal of causing a meaningful impact on the system and transforming the specific conditions that give rise to a particular problem will need to be especially careful when defining their objectives, their allies' profiles, and the expected results by the end of the program. These three sub-processes are key to achieving this end: 1) *Request for proposals design*, 2) *Communication campaign and receiving proposals*, and 3) *Proposals evaluation and selection*.

These sub-processes were defined according to the experience of USAID's CSA with CSOs that were awarded direct grants, as well as with Intermediate Support Organizations (ISOs)[1] that were awarded direct grants and also replicated the program's grant administration and capacity development model with fourteen additional CSOs that received sub-grants from the ISOs with CSA funds.[2]

In order to incorporate multiple perspectives while compiling learnings about the implementation of the program and the replication phase through the ISOs, CSA held several reflection sessions with the grantee organizations to identify those learnings relative to the replication of the grant component, which sought to answer three key questions: 1) What was planned? 2) What happened? and 3) What can improve? The people involved in the screening and selection process of the proposals for each organization participated during this process. What follows is a description of each sub-process along with the findings and key learnings that can serve as considerations and recommendations from the international cooperative perspective for implementing a grants program for CSOs.

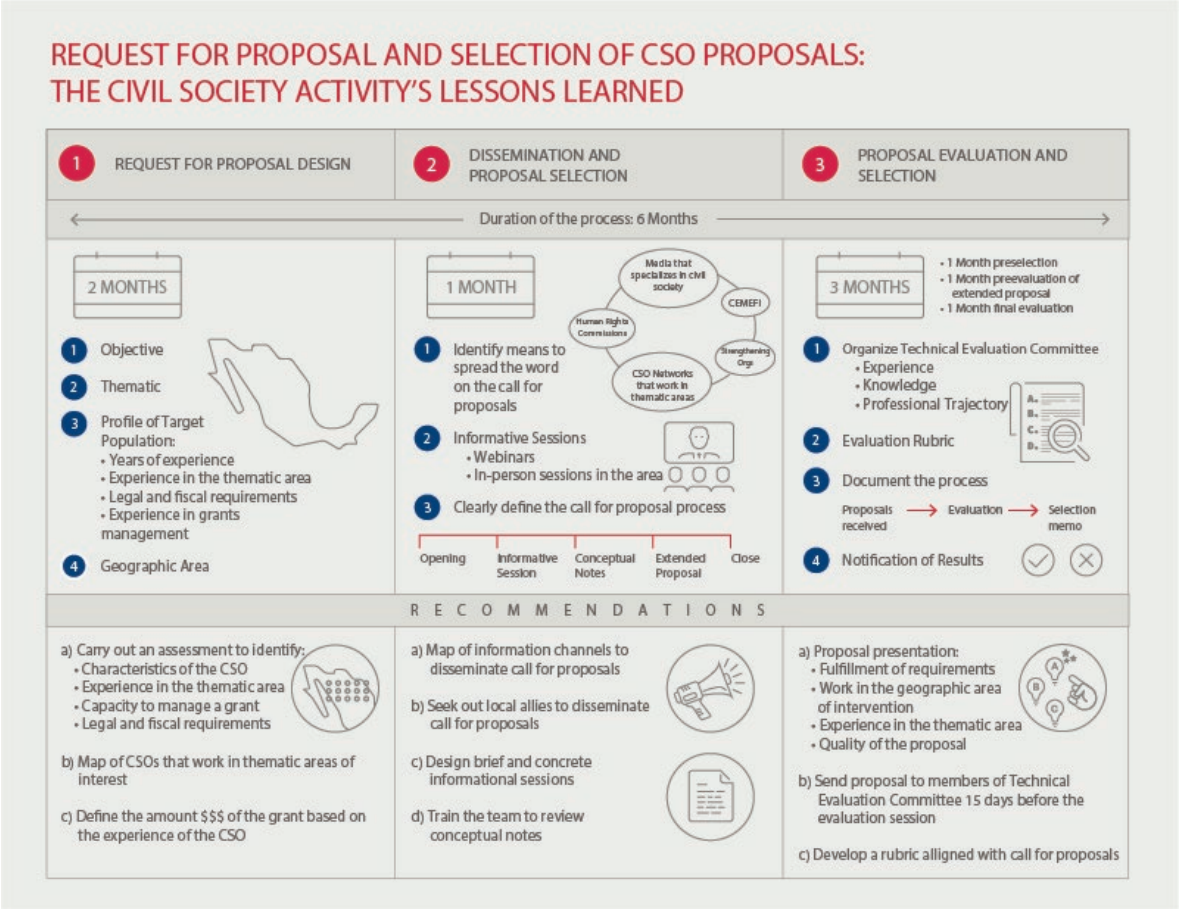
The learning process shows that any person implementing the program should pay attention to the following key elements in order to ensure the success of the program: a) when selecting the CSOs, it is important to differentiate the technical-thematic selection criteria for administrative, legal and fiscal matters, b) verify that the selection criteria established in the Request for Proposals (RFP) are consistent with the technical, administrative and operative capacities, as well as with the profile of the CSOs that took part in the screening, and c) define the expected scope (number of organizations receiving grants, total funds allocated) according to a previous mapping, as well as an estimate of the number of existing, active CSOs that address the thematic areas covered by RFP and have the correct profile to fulfill the selection criteria.

[1] ISOs strengthen the civil society sector by providing grants on a regular basis for the institutional strengthening of other organizations.
[2] For more information on the replication process carried out by the ISOs, consult the document *Guide to Scaling Up Capacity Development Through Transfer and Replication*, which forms part of CSA's Legacy Compendium.

The following image presents a strategic summary of the key aspects to consider during the process of calling for grants, particularly regarding CSOs. The featured elements are useful given that they offer guidance on how to develop an optimal screening and selection process for proposals in order for the process to respond both to the awarding organization's and the recipient CSO's objectives, as well as to the local needs in the country where the intervention will take place. It is essential to acknowledge the local reality and the level of progress in the respective topics of interest, so as to achieve the results and cause the desired impact on the target population.

Image I provides information on the stages of the CSO *Proposal Screening and Selection Process* and their respective steps to follow, as well as basic recommendations based on the program's experience. Specific recommendations will be provided in more detail throughout the document.

FIGURE 1. CSO PROPOSAL SCREENING AND SELECTION



INTRODUCTION

The role of CSOs in Latin America, just as in many other parts of the world, is essential to address numerous problems and to promote several programs and public policies that make up for better life conditions and access to rights for important sectors of the population.

It is in this context that the role of international cooperative agencies (ICAs) in Mexico becomes particularly relevant and opportune. The role of ICAs, such as USAID, has gained a lot of traction due to the fact that today there are very few instances that provide support, including funding, technical assistance or other kind of resources for local CSOs, in order for them to address complex subjects in the country like human rights defense, violence prevention, and access to justice.

Considering this, it is worth exploring new routes for collaboration between ICAs and CSOs so that their relationship goes beyond simply awarding grants and ensuring CSO compliance with ICAs' regulations. The goal should be to create true alliances in order to create better conditions in which objectives can be met and in which results are shared between both parties.

It is essential to transcend the vertical relationship that might usually be established between the grant-awarding entity and the implementing organization, who will just do what is "ordered," and transition towards a collaborative scheme among peers, in which there is open, two-way dialogue. This allows for the collection and integration of learnings and recommendations from the counterparts during the design and implementation of the programs, for the definition of topics of interest, as well as of the criteria and processes for funding. This will contribute to the improvement of the processes of granting and collaboration between the actors, thus leading to a greater impact of their programs on development agendas.

A cooperative relationship between autonomous entities implies a profound analysis and definition of common interests between the parts, the possibility to mutually recognize themselves as different from each other, the ability to identify actions that can be performed in a joint manner, the collective creation of the "rules of the game" of said relationship and, as a consequence of the latter, decision-making through mutual agreement. It is a process of co-creation of initiatives (both at the programming and administrative levels). From this perspective, it is possible to recover the value of solidarity that inspired the origin of international cooperation relations, bringing back its ethical dimension.[3]

In this light, the present document seeks to communicate the learnings of USAID's CSA in Mexico, based on the program's own implementation experience regarding the CSO screening and selection process. CSA considers that four years of funding, collaborating with, and strengthening partner CSOs can serve as an invaluable experience that might shed light on how to improve the collaboration between ICAs and CSOs in order to strengthen the sustainability of results and

[3] Sánchez, G. 2008. *La cooperación europea no gubernamental en México*. B. Schmukler, C. Ayala y G. Sánchez, Cooperación Internacional para el desarrollo en México: hacia una agenda participativa, p 312. México, Miguel Porrúa, Instituto Mora.

contribute in a more effective way towards the Development Objectives[4] that the two have in common.

CSA's Theory of Change (ToC) is based on the hypothesis that strengthening CSOs at the local level has a direct impact on improving the organization's capacity to influence development agendas, including subjects like human rights (HR) defense, access to justice, and violence prevention. Part of this strengthening is achieved by awarding grants for those projects that address these topics. Therefore, it is essential to develop an effective initial process, identifying the counterparts through an adequate mechanism, in line with the characteristics of the context, in order to properly distribute the necessary resources to strengthen the organizations. By doing so, the social causes will achieve sustainable results at the same time that the ICA's objectives are met.

The experience of CSA shows that it is important to incorporate a dynamic of dialogue between cooperative agencies and implementing organizations during the process of screening and selection of CSOs, so that adaptability is favored. Accordingly, the recommendations stated in this document propose that, from the beginning of a program, regardless of the cooperation agency, the probability of success could be either guaranteed or at least improved significantly if the program design takes into consideration real and concrete knowledge about the characteristics, strengths and weaknesses of the environment and the involved counterparts, as well as those topics with which they work that are considered a priority by USAID or any other ICA.

Before going into the details of the process of grant administration and CSA's recommendations on that matter, a general context of CSA is provided next.

THE APPROACH OF THE USAID CIVIL SOCIETY ACTIVITY

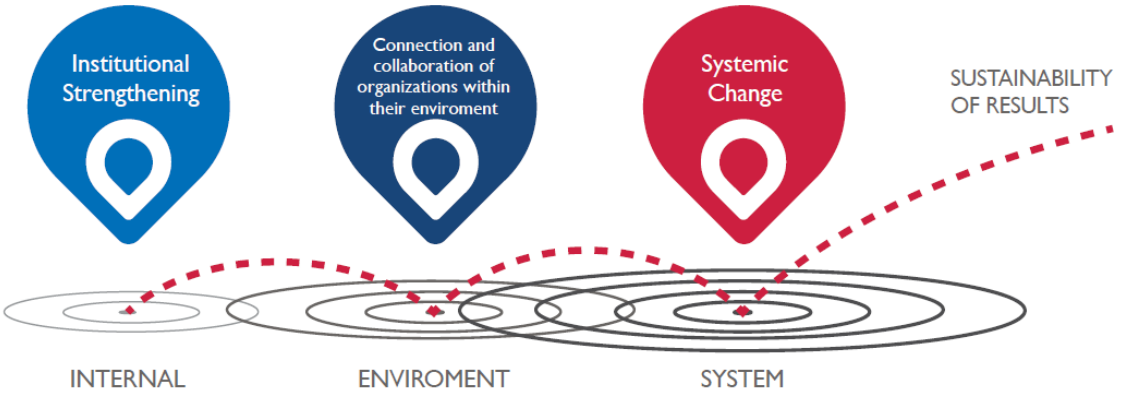
USAID/Mexico designed the Civil Society Activity (CSA) to improve institutional capacities and increase the sustainability of Civil Society Organizations (CSOs) in Mexico so they can more effectively implement their agendas related to crime and violence prevention, legal justice reform, and human rights. CSA supports three of USAID/Mexico's Development Objectives (DOs): DO 1 on crime and violence prevention; DO 2 on access to justice; and DO 3 on human rights. Social Impact is the prime implementer of the CSA contract and has designed the approaches described in this Strategy based on close collaboration with local partner organizations.

CSA's Strategic Approach remains firmly rooted in the original capacity building objective; upon receiving a contract modification on June 22nd, 2018, CSA expanded its intervention to emphasize systems-based strengthening in addition to internal organizational capacity development to sustain development results.

[4] Development Objectives, DOs: Strategic objectives established by the National Development Cooperation Strategy by USAID Mexico, which include: 1) sustainably reducing crime and violence in targeted communities, 2) a more transparent and responsible justice system, and 3) a greater respect for human rights.

With an emphasis on improved organizational performance, rigorous assessment, the co-creation of solutions, systemic impact, and sustainability, CSA's comprehensive approach is well aligned with USAID's Journey to Self-Reliance (J2SR)[5] and focuses on measurable, increased local capacity. Thus, CSA provides a potential model for other USAID-funded capacity-building activities, as well as other capacity-building work, to enhance development impact and sustainability. Figure 2 provides more information on CSA's strategy.

FIGURE 2. THE STRATEGY OF THE CIVIL SOCIETY ACTIVITY



The Civil Society Activity implemented a systemic approach to capacity development across three primary components:

- **GRANTS:** Administer USAID grants awarded to civil society organizations to help them develop their thematic projects and capacity development initiatives.

- **LEGAL STRENGTHENING:** Provide technical support to improve legal compliance in areas of corporate, fiscal, and labor law; money laundering; and data privacy, through a network of pro-bono law firms based in Mexico and coordinated by CSA.

- **INSTITUTIONAL STRENGTHENING:** Accompany CSOs in developing their capacities in three ways—by improving internal capacities, strengthening abilities to create and sustain strategic alliances, and solidifying their positions within their Local Systems—based on an integrated methodology that incorporates Human and

[5] https://www.usaid.gov/sites/default/files/documents/1870/J2SR_Fact_Sheet_June_2020.pdf

Institutional Capacity Development (HICD), [6] Local Systems [7] and Capacity 2.0 [8] approaches.

CSA worked with three tiers of CSOs:

Tier 1: was comprised of 10 CSOs that were awarded a USAID grant starting in the first year of CSA implementation and that lasted for three years. Three of these CSOs were Intermediate Support Organizations (ISOs) that replicated grants administration and capacity development with fourteen CSOs who were their subgrantees. Organizations within this tier received CSA's full range of technical assistance.

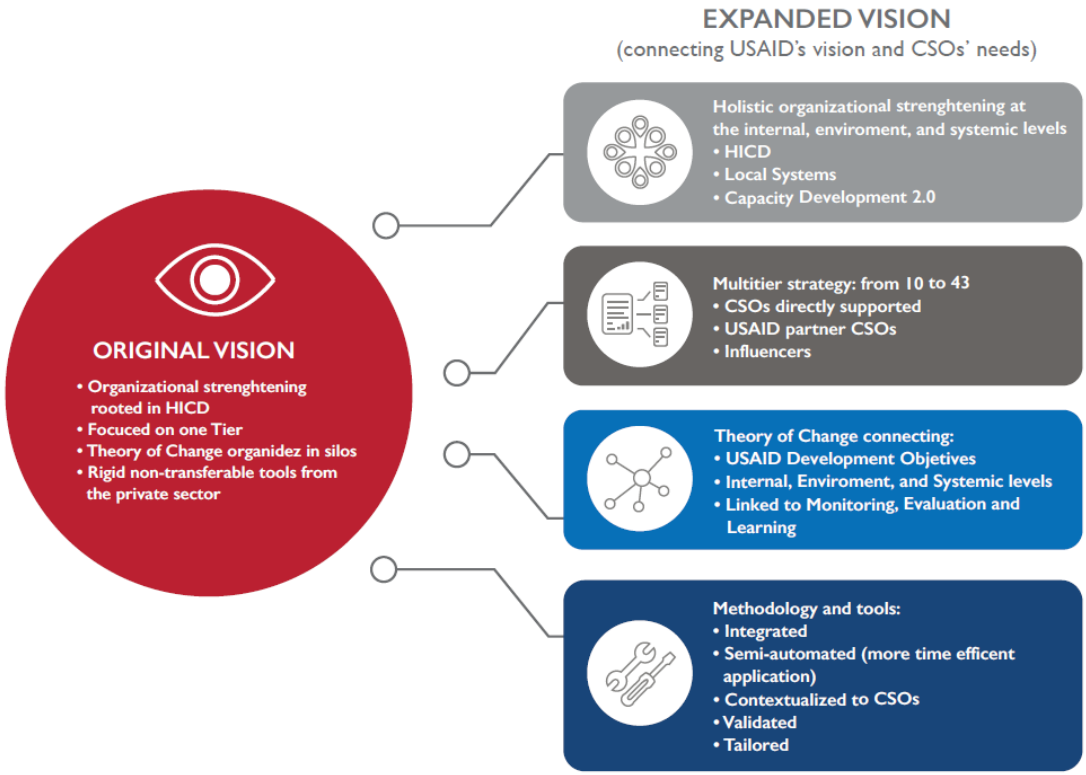
Tier 2: These organizations took part in a modular assessment of their organizational performance. The development of their capacities was focused on specific areas to improve their legal status and performance solutions to address performance gaps identified during the assessment process. These organizations were not awarded a direct grant by CSA.

Tier 3: Civil Society Organizations that play a key role for the civil society sector by helping to create a more enabling environment for their activities. These organizations are considered to have a direct influence on one or more dimensions of USAID's Civil Society Sustainability Index. The CSOs serve as influencers in the civil society sector, and include actors that are innovators, whether they be leaders of change, intermediaries across sectors that do not normally interact with each other, and/or key sources of information for the civil society sector. During its last year-and-a-half of implementation, CSA established strategic alliances with these organizations and offered grants for concrete initiatives by the CSOs.

Figure 3 provides more information on the evolution of the Civil Society Activity so that every tier, or groups of partner organizations, could be catered to.

[6] USAID. (2011). Human and Institutional Capacity Development Handbook: A USAID model for sustainable performance improvement.
https://usaidlearninglab.org/sites/default/files/resource/files/HICD%20Handbook%202011%20-%2008.pdf
[7] USAID. (2014). Local Systems: A Framework for Supporting Sustained Development, Accessed from https://www.usaid.gov/policy/local-systems-framework
[8] USAID. (2017). Capacity 2.0. Accessed on July 27, 2020. https://usaidlearninglab.org/library/capacity-20

FIGURE 3. EVOLUTION OF USAID CIVIL SOCIETY ACTIVITY



Social Impact (SI) based CSA's original program design on the HICD model. However, as CSA became familiar with Capacity 2.0 at USAID and took time to pause and reflect with partner organizations, CSA identified the need to expand its capacity development approach. Consistent with Collaborating, Learning, and Adapting (CLA)[9], the CSA team began to propose additional components to the theory of change that would complement the original vision rooted in HICD, while also drawing upon the latest best practices in the field. Inspired by the Local Systems and Capacity Development 2.0 approaches, the team began to view organizational strengthening in three dimensions: strengthening internal capacities, strengthening relationships and networks in which organizations participate, and strengthening organizations' positions within their Local Systems.

In a major conceptual and methodological shift, by adopting USAID's Local Systems[10] framework CSA expanded its understanding of organizational capacities beyond those that are internal to an organization. Based on this framework, CSA views each CSO as one of many actors within a system working on a given social issue. For individual CSOs and the CSO sector as a whole to have sustainable impact, it is crucial to develop their organizational capacities to interact, communicate, and collaborate, not only amongst themselves but also with other diverse actors operating in the

[9] https://www.usaid.gov/ethiopia/vacancy-announcement/cla-specialist-august-2020
[10] https://www.usaid.gov/policy/local-systems-framework

same system. In this way, CSA was able to more effectively support organizations as they tackled complex challenges in their environments.

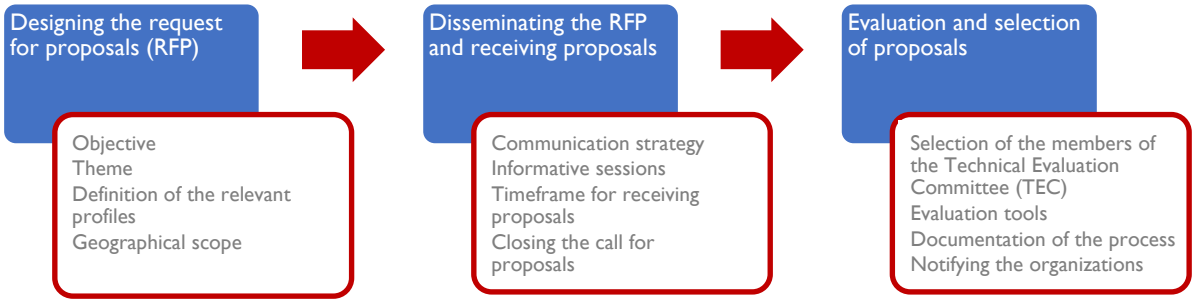
Next, a detailed explanation on the methodology followed to design the request for proposals under USAID's funding framework.

METHODOLOGY FOR DESIGNING A REQUEST FOR PROPOSALS

The request for proposals and selection process constitute the initial stages of the *General Process for Awarding and Administrating Grants*. The objective is to present and disseminate the requirements for participation in the allocation of resources according to the agreed modality and subsequently select the proposals through an impartial entity referred to as the Technical Evaluation Committee, which is made up of people with a level of expertise on the specific matter dealt with in the request for proposals and/or on the civil society sector[11] where the program is taking place.

This process comprises three key sub-processes in order to achieve the expected result: 1) *Designing the request for proposals*, 2) *Communication campaign and receiving proposals*, and 3) *Proposals screening and selection*. These sub-processes were defined based on CSA's experience of awarding grants directly to CSOs, as well as on the experience of some organizations that participated in the program as Intermediate Support Organizations (ISOs), who replicated CSA's model for grant administration and capacity development with other 14 CSOs that were also awarded grants.

FIGURE 4. THE REQUEST FOR PROPOSALS PROCESS



Note: Produced by CSA based on its own experience and on the experience of those organizations that replicated CSA's capacity development approach (ISOs).

What follows is a description of each of the stages in the request for proposals and screening

[11] These persons could definitely be part of the technical staff of the requesting agency, or a combination of team members of the requesting agency and external people that could provide highly specialized knowledge or simply a valuable external perspective.

processes, as well as the considerations that might be taken into account by the implementing programs during execution. After each subprocess description there is a small section that features findings and learnings taken from the experience of CSA and the ISOs, highlighting the aspects that worked best and those that might be considered after having identified certain learnings.

I. REQUEST FOR PROPOSALS DESIGN

Before establishing the objectives of the request for proposals, it is worth noting that a diagnosis or mapping should be carried out in order to have an understanding of the sociocultural context in which the CSOs work, as well as the legal requirements set by the residing country for receiving funds by an international cooperation agency, and the experience of the requested organizations in grant administration and institutional capacities, among other influencing factors. This information is required to define the following key elements:

1. **Organizations' profile**. Years of experience in the subject matter (level of influence on the target population), experience in fund administration, legal requirements, institutional capacity to implement a project (operative and management teams), etc.
2. **Institutional maturity of the organizations**. Identifying each CSO's characteristics is a key step to defining strategies and the type of follow-up it will receive in order to best contribute to its strengthening.
3. **Number of grantee organizations**. This decision should be made not only depending on the amount of available resources, but also on the capacity of the funding agency to provide appropriate follow-up to the organizations so as to ensure optimal performance, as well as on a realistic assessment of the number of organizations that can potentially match the required profile as defined in the request for proposals.
4. **Budget allocation based on the organizations' capacity to administer funds**.

An analysis of these considerations should be made before going forward with the request for proposals, the design of which should take the definition of the following elements into consideration:

- Objective
- Subject matter
- Participants profile
- Geographical scope of the intervention.

Objective: To define the main objective of the program by outlining the theory of change (ToC). CSA's ToC was the *pathway* that allowed it to identify: *how* the results in the target population would be achieved, the *long-term objectives*, as well as *how* CSA could achieve those objectives/results by organizing *activities* and offering *products* and/or *services*.

By being clear about the objective(s) of the program, the terms of reference can be more easily defined, i.e.: scope of the request, target population's profile, number of projects that will be awarded grants, duration of the projects, budget allocation, geographic scope, and other elements that will be part of the activities developed during the process of designing the request for proposals. It is paramount to make sure that the objectives were defined only after having previously researched and diagnosed the situation, characteristics and limitations of the potential candidates.

It is worth noting that a plural team (at least two people) is required in order to design the request for proposals. The team members should be knowledgeable on the social reality of the place where the program will be executed, the target population (experience on the subject matter of the request), what kind of projects have been implemented, as well as the capacities in management, operations and results, in addition to having some experience in program design and evaluation.

Subject matter: The definition of the subject matter depends on the identified problems that need to be addressed, as well as on the interest by the program to promote certain initiatives. The specific subject matter that the program seeks to address can be defined after establishing its main objective. For instance, if the goal is to strengthen the judicial system of a country, the subject matter of the request for proposals could be defined around the topics that help to identify better practices in justice processes and how these practices could be replicated in other scenarios.

Participants' profile: If the implementing agency does not have an understanding of the context of the population that the request for proposals is targeted to, then it is important to conduct a mapping of the sector. In the case that the target population consists of CSOs, the mapping should take into account the number of organizations that deal with the subject matters of interest in the defined geographical space, their level of influence (in case of violence prevention, specificy primary, secondary or tertiary), their capacity to administer funds (sources of income, allocated funds, implementation duration), and institutional capacity (operative infrastructure), among other important aspects to consider. CSA recommends doing a previous screening with second tier organizations and/or other specialists on the matter. For instance, the Human Rights State Commissions have an accurate representation of the organizations' work in the field and could share valuable information on the type of organizations that could match the desired profile of the request. This information could also be used to define the scope of the intervention (goals) and choose the best means to communicate with the candidates.

On the other hand, it is important to analyze the local legal framework and its implications on the request for proposals' profile and requirements, so that each organization can determine if it is eligible for participation according to its own structure, regulations and the legal framework in which it operates. If the implementing agency seeks to replicate its own model, as CSA did with the ISOs, it is important to identify every legal requirement (i.e. articles of incorporation that are relevant for being able to award grants to other CSOs) and fiscal requirement (holding the proper authorization as a grantor to perform the specific activity of "awarding grants to authorized donnees").

Geographical scope of the intervention: Sometimes either the agency or the donor have previously defined the area where they will work. However, it is important to identify the local

status in each of the federal entities where the implementation will take place, because at each level of governance (state, municipality and town) there could be particular social phenomena taking place. This analysis will be useful to define communication strategies in order to make the request for proposals available for society and, finally, to successfully implement the program.

Next, the findings and recommendations that provide a synthesis of good practices that were identified thanks to the experience both of CSA and its three allied ISOs during the request for proposals design process are presented.

CSA'S RECOMMENDATIONS FOR THE REPLICATION OF THE REQUEST FOR PROPOSALS DESIGN PROCESS

Due diligence

- Conduct research/diagnosis to identify:
    - CSOs' socio-cultural context
    - Legal requirements set by the country in order to be able to receive funding from an international cooperation agency
    - Experience in grant management
    - Institutional capacities of the target organizations
- Define the budget of the grant according to the organizations' installed capacity and their experience in grant management.
- Validate the legal requirements for the CSOs that will act as second tier organizations in order to have a process of transfer and replication.
- Identify the type of subject matters that the organizations deal with, as well as their levels of experience, in order to prevent working under assumptions that do not correspond with the reality of the zone of intervention.
- Identify the type of follow-up that will be given to the grantee organizations during implementation, along with the time required from the CSOs to dedicate to that matter, in order to clearly state the requirements regarding the operational team for implementation and follow-up of the project in the request for proposals. This is meant to ensure that the CSO clearly knows about the commitment necessary for their team to participate in the program.

Timetable

- If it is the first time designing a request for proposals, a timeframe of at least two months is suggested to complete this process. The first month will be used for completing field and

desk research on the profile and characteristics of the target CSOs. During the second month, the findings of this research will be used to precisely define the eligibility criteria. When a due diligence process has been done effectively, a month's time will be enough to successfully carry out this subprocess.

- It is important to have in mind that the entire process, from the design of the request to the selection of proposals and the signing of the grant contracts, may take up to six months, or more, in order to be satisfactorily completed. For this reason, the following time slots are suggested for each of the stages, summing up to a total of six months' time for the process of request, reception and selection of proposals:
    - Preparing, designing and approving the request: two months.
    - Receiving concept notes, questions and observations: one month after launching the request, during which time the request remains open.
    - Pre-selection: one month.
    - Receiving and evaluating complete proposals: one month.
    - Final selection: one month.

Content of the Request

- Consider that the profiles of those involved in writing the request should have experience in the sector and the subject matters relevant to the request.
- Use appropriate language for the target population. Consider avoiding technical terms that may be too specific and could reduce the potential universe of applicants to those organizations that are already familiar with this kind of terminology. The language should be clear, precise and accessible.
- Define the objectives of the request based on the context of the country, considering the possible characteristics and limitations of the applicant CSOs.
- Analyze the local legal and fiscal frameworks in order to identify requirements that should be stated in the request.
- Inform with clarity about the different stages of the selection process in the main text of the request for proposals and reinforce that information during the informative sessions.
- Define the minimum and maximum budget amounts for the grants, according to the institutional capacity and the general experience that the target CSOs that participate in the request might have regarding management and delivering financial reports on projects with a similar scope.

- Specify in the request what the minimum capacity is that a grantee organization should have in adequately administering funds and correctly implementing the thematic project in accordance with the value of the grant, the expected results and/or the project's scope, etc. For instance, a team consisting of minimum five full-time staff members (Project Manager, Monitoring and Evaluation, Finance, program and/or strengthening specialist), so that the CSO can consider its current capacities, time schedules and commitment to other projects before actually submitting a proposal.

- In cases like CSA, where awarding grants for the implementation of projects is not the only goal, but it is also paramount to achieve institutional strengthening of the partner organizations, this must be clearly stated in the request for proposals. The request should be very clear regarding the expectations in terms of the level of importance (and the subsequent amount of time and effort that should be invested) that the institutional strengthening process will require from the grantee organization. CSA recommends asking the CSOs to appoint someone who will be responsible for the strengthening process (this will depend on the size and capacity of the CSO).

2. COMMUNICATION CAMPAIGN AND RECEIVING PROPOSALS

The Request for Proposals (RFP)[12] is a guide to effectively develop proposals, and it also is the primary means by which participating CSOs may have access to funding. Every donor and/or implementing agency will design their request for proposals in such a way that the original objectives will be met. The ideal scenario is that the requesting agency organizes informative sessions, so as to open a forum where the candidates will have the chance to ask questions regarding the request, which will enable organizations to fully comprehend the requirements and criteria in order to present competitive proposals.

Reaching a good number of organizations will largely depend on the strategic communication campaign of the RFQ. The objective of this sub-process is to identify the key ways to disseminate the RFQ, as well as the relevant actors in each sector. In the case of CSA, this included institutions such as the Mexican Center for Philanthropy (CEMEFI), the Private Assistance Council in each entity, the state commissions of human rights, local CSO networks, and specialized media, among others. The selection has to do with the actors' influence on society, their capacity to draw large audiences, and the fact that they are considered points of reference by the CSO population. From a systemic standpoint, the ideal scenario would be to land a strategic alliance or collaboration.

Communication strategies: Creating communications materials that effectively position a program's grant initiative and make it visible is an important step to reach the public and draw the organizations' and relevant actors' attention.

[12] The Request for Proposals (RFP) is usually carried out by means of an announcement process by either an agency or a tier 2 organization who is interested in funding projects with certain characteristics and that are directed to actors with experience on such subject matters. In the case of Civil Society Activity, it was targeted to CSOs.

Informative sessions: It is important to have a space for bilateral communication to inform in greater detail about the guidelines of the request and the expected quality of the proposal submissions. These sessions are very useful to ensure that the submitted proposals make sense according to the expectations of the request, and so that the organizations may have key information that will allow them to present better proposals. For this reason, this mechanism constitutes a mutual benefit for the cooperation agencies, implementing organizations, and CSOs.

The following findings and recommendations synthesize good practices that were identified thanks to the experience of both the CSA and the three ISOs during the communication campaign of the request and the proposal reception sub-processes.

CSA'S RECOMMENDATIONS FOR THE REPLICATION OF THE COMMUNICATION CAMPAIGN FOR THE RFQ AND THE SELECTION OF PROPOSALS

Composition and Process

- Write the request in the *official language of the country* (or the common language among the CSOs), using accessible and inclusive language.
- Identify second tier organizations, not only at the research level, but also in the field, in order to measure the size of the potential target population and to choose the ideal means for dissemination.
- Establish a clear methodology for the dissemination of the request (according to the CSO mapping), as well as strategies for reaching out to the target CSOs.
- Identify the key players necessary for an effective dissemination campaign of the RFQ: relevant actors in the sector, umbrella institutions like CEMEFI, the Private Assistance Councils, state commissions for human rights, and local networks of CSOs, among others.
- Have the RFQ design reviewed by external people that may have technical knowledge on the subject matter of the request for them to validate its clarity.
- Arrange informative sessions for the candidate organizations to attend in order to answer questions and resolve doubts about the participation requirements, eligibility criteria, etc. This is also a great opportunity to strengthen the institutions' capacity to comply with the grantor's requirements, as well as to be able to better design and articulate their technical approach to the subject.

Contents

- Produce a document with frequently asked questions that can be included as an appendix to the request.

- Produce the content for the informative sessions and/or webinar in order for it to last no longer than 25 minutes of presentation time, allowing for an extra 20 minutes for questions. It's best to keep the duration of the sessions under 45 minutes time, so as not to lose the attention of the participants.

Timeframe

- Consider presenting the request in two stages. In stage one, the candidate organizations will submit a conceptual outline of the project; in stage two, pre-selected organizations will submit a more thorough and extensive proposal.
- The informative sessions and/or webinars may take place five days after launching the request in order to answer questions, clarify objectives and respond to general inquiries.

3. EVALUATION AND SELECTION OF PROPOSALS

Once the request for proposals is closed, the next step is to evaluate and select the proposals. It is important to do a pre-selection of the proposals to make sure that those that reach the evaluation phase will comply with the requirements of the request. A Technical Evaluation Committee (TEC) should be appointed to ensure a transparent process during selection.

The TEC should be composed of five people with diverse profiles, as their experience and professional trajectories will ensure that the selected organizations match the selection criteria. Based on CSA's experience, the desirable profiles should include: 1) a monitoring and evaluation specialist, 2) a budget specialist, 3) a project and program implementation specialist, 4) an institutional strengthening specialist, and 5) a subject matters specialist.

The following activities are recommended for the process of the TEC:

Elect the members of the technical evaluation committee: The selection criteria for the election of the TEC members should be clearly defined. Among the main aspects to consider are technical and professional experience; that the candidates don't have a conflict of interest with one of the candidate CSOs; curriculum, and reputation.

Use a tool provided for the evaluation of proposals: This tool should be aligned with the requirements of the request, with well-defined criteria and a clear indication of the minimum and maximum scores for each of them. It's desirable to have space for a narrative section, where the evaluators can express their comments, observations and/or recommendations regarding the strengths and weaknesses of the proposals. This section will be very useful when communicating the TEC's observations to the candidate organizations. See Appendix I for an example of a Proposal Evaluation Tool.

Document the selection process: The selection process should be respected at all times. It is recommended to document the whole process, including the following information:

1. Evaluation document with clear selection criteria, which should also be stated in the content of the request.
2. Signed letter by the members of the TEC, where it is clearly stated that there is no present conflict of interest.
3. Signed letter by the members of the TEC where they agree not to disclose the information contained in the submitted proposals.
4. A selection memo, including a description of the number of proposals received and the number of selected organizations or actors, along with the evaluators' observations and recommendations, as well as improvement suggestions for the proposals that got pre-selected. See Appendix 2 for an example of a Selection Process Memo.

Notify the TEC's results: In order to close the selection process, it is important to notify the candidate organizations about the decisions reached by the Technical Evaluation Committee. These notifications should be concrete and well substantiated regarding the compliance or non-compliance with the requirements of the request. There are two suggested formats for this:

1. Notification letter of selection, along with observations/suggestions by the TEC, to be considered as a possible grantee. See Appendix 3 for an example.
2. Notification letter of non-selection for rejected proposals (including some recommendations). See Appendix 4 for an example.

It is important to collect the observations made by the evaluation team in order to customize the response to each candidate. This activity will be helpful for the actors that were not selected so that they can improve their future proposals; for pre-selected organizations, areas for improvement will be also identified and during a set period of time they will be able to make due adjustments before the final proposal submission. This is an exercise that promotes credibility, trust, and transparency in the selection process.

The following findings and recommendations are based on good practices that were identified thanks to the experience of both the CSA and the three ISOs during the evaluation and selection of proposals sub-process.

CSA'S RECOMMENDATIONS FOR THE REPLICATION OF THE PROCESS OF PROPOSAL EVALUATION AND SELECTION

Due diligence

- Define the different selection filters and select a Technical Evaluation Committee composed of experts in all relevant subject matters, context and sector.
- The first selection filter will be verifying that a profile matches the requirements of the request; for instance, validate the candidate's experience on the subject matter, its legal

constitution, its experience in the area of implementation, that its social purpose is related to the project in question, and its Federal Taxpayer Registry ID, among others. A second filter is to validate that the submitted project matches the requirements of the request. It's best that these two initial filters are applied by the implementation team, so that the TEC may focus on reviewing the proposals' alignment with the request.

- In the case that other stakeholders (like the donor, the board, etc) are invited to be part of the selection process, the recommendation is that they have a voice but not a vote; this is to encourage transparency as a principle, as the implementing agency has already created a panel of experts in order to perform an objective selection of the candidates.

Content

- Enable a submitted proposals tracker to effectively document the process.
- Produce a rubric or evaluation format that is in line with the request's guidelines.
- It is important to prioritize the experience of those actors or organizations in the intervention area, for this will better enable the project's implementation. Selecting organizations that have not worked in the area makes for a difficult time approaching and getting acquainted with the local system.

Timeframe

- Provide the TEC members with the selection criteria and the formats that will be used to evaluate the proposals, as well as all the available information on the projects that will be evaluated, at least 15 days in advance. At the same time, request that the members of the committee submit their evaluations at least one day in advance of when the selection committee will take place.

CONCLUSIONS

The job of the agency that implements a program funded by an ICA is to respond to requirements and comply with established objectives (in accordance to each ICA's strategic lines of action). However, it is important to promote a dialogue between the two so that the ICA's vision is expanded and actually responds to local needs, thus achieving an effective collaboration that encourages the sustainability of the results.

Designing a request for proposals

One important conclusion after the experience of CSA is that having an early, robust diagnosis on the context, as well as a consistent map of the CSOs that work with the subject matters of interest in the areas of human rights, justice, and violence prevention, would have provided key information to identify the scale of the coming challenges during implementation. This is due to the fact that very few organizations actually had the right profile as defined during the design process of the RFQ. Not having this information in an earlier stage meant that adjustments had to be made to the goals, and that the organizations' profile had to be redefined. Adjusting the profile and required experience of participating organizations allowed for a larger universe of potential candidates and it also provided an opportunity to promote the development of this expertise among new organizations. For instance, CSA allowed organizations with very little experience on the subject of secondary and tertiary violence prevention to participate, and so they were able to delve into the matter; by doing so, CSA increased the number of organizations that could potentially become USAID partners on these subjects in the future. An important result of this was the creation of novel models for intervention in secondary and tertiary violence prevention, as well as in bringing access to justice to young offenders. These models incorporated the participation and creation of public-private alliances between local and state governments, judicial authorities, local businesses and CSOs.

Furthermore, another key recommendation is to have a previous diagnosis that takes into consideration not only technical and thematic aspects, but also the legal and fiscal requirements that the organizations will have to fulfill in order to be able to administer a grant. This will let them create strategies that contribute to the requirements set by the ICA while at the same time effectively covering the intervention area's local needs.

Additionally, it is important that the request is clearly written, properly identifying all the technical, legal and fiscal requirements, as well as the operative and administrative capacities the CSOs need to have. Participating in a program such as the one CSA led requires a robust organizational commitment, as the CSOs are simultaneously implementing a thematic project and participating in an institutional strengthening process. For this matter, it is paramount to inform them about the time and human capital resources that will be required, given that for some CSOs this could mean the difference between either receiving a strong benefit or having a burden because of the demanding nature of the processes involved.

Communication campaign

The informative sessions are particularly useful to clarify any questions regarding the request's requirements and they are also a good opportunity for the implementing entity to get to know the candidate organizations and learn about the context in which they operate. For CSA, arranging these sessions also enabled the dissemination of the request, thanks to local organizations.

At the same time the request is designed, a map of the spaces where the request can be disseminated should also be produced, in order to draw the attention of CSOs that work in different spaces, thus creating a diverse group of candidate CSOs. By doing so, the suggested duration time of one month for the request will be more than enough for the organizations to submit their proposals, thanks to the strategic nature of this form of communication. Failing to do so will result in having to extend the time for the reception of proposals and this will subsequently delay implementation, even potentially risking compliance of the goals that were set during the program's design.

Evaluation and selection of proposals

In order to make the selection process easier to handle, especially if a high number of proposals is expected, there should be defined filters for the selection process and a Technical Committee of Evaluation, composed of experts in the subject, should also be appointed. The first suggested filter consists in validating that the candidate organization's profile matches what was established in the request. This implies validating their experience on the subject matter of interest, its legal status, its experience in the area of implementation, that its social purpose is related to the project in question, among others. A second filter consists in validating that the submitted project matches the specific requirements of the request. These two filters can be applied by the implementation team, so that the TEC may focus only on those proposals that are aligned with the request. Once it has been verified that the CSOs have fulfilled every legal and fiscal requirement, and that they have proper operative and administrative capacity, then the proposals review must focus on technical-operative and financial aspects.

By having an evaluation rubric that is aligned with the request and allowing the evaluators to write down their observations regarding the failures or strengths of every proposal, there will be enough evidence to present when notifying the CSOs about the results of the selection process. This is an exercise that promotes credibility, trust and transparency in the selection process and will be helpful for the CSOs that were not selected in order for them to improve future submissions. Likewise, for pre-selected organizations, some areas for improvement will be identified and during a set period of time they will be able to make due adjustments before the final proposal submission.

The recommendations presented in this document are based on CSA's experience and are aligned with USAID's Collaborating, Learning and Adapting (CLA) approach. The recommendations are also based on a set of practices designed to strengthen organizational learning and to ensure effectiveness for projects or programs. Sharing this experience is expected to help other implementing entities to optimize their time and resources, as it features systematized experiences that might guide future implementation programs, allowing for a contextualization according to the local reality and several other topics of interest.

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APPENDIXES

APPENDIX 1. EVALUATION TOOL

Evaluation sheet	
Evaluation criterion	**Score**
1.WORK PLAN	**20 (max.)**
1.1 Implementation plan: Describe the activities in the most specific and detailed possible way and identify the person(s) responsible for them. Be realistic about the time schedule and what the achievements of the project might be. **(10 points maximum)**	
1.2 Operative – Directive Team: Describe the people in charge of the project's administration and their respective roles. Provide technical qualifications, professional competency, relevant academic background, language competency, and experience of all the key staff members that will get involved during the implementation of the proposed activities. Suggest a structure and a management approach to ensure the project's efficacy and efficiency in order to achieve the best results and benefits. Develop a structure with gender perspective. **(10 points maximum)**	
Subtotal 1. Work Plan	
2. METHODOLOGY	**30 (max.)**
2.1 Issue awareness and familiarity with key actors/allies and beneficiaries: Ability to perform a contextual analysis of the organization, identifying determining factors (cultural, demographic, social and economic) of the problem at a local or community level, identifying and/or mapping relevant actors or possible allies, and describing the beneficiaries' profile and characteristics. **(10 points maximum)**	
2.2 Planning and approach: Ability to propose activities from an innovative and creative perspective. Are the proposed instruments coherent with the proposal's objectives and expected results? Do the program's or project's objectives and expected results contribute to the organization's objective? **(10 points maximum)**	
2.3 Relevance. The proposal should be able to demonstrate how does the project contribute data and information that help substantiate the proposal in it own context. The organization should show a clear understanding of the context in which the project will be implemented, as well as of the potential risks. **(5 points maximum)**	
2.4 Participative approach: Integration and consideration of the beneficiaries' needs, demands or concerns about the project's cycle (design, implementation and evaluation) from a gender perspective and taking the different voices of the vulnerable groups and populations into account. **(5 points maximum)**	
Subtotal 2. Methodology	
3. INDICATOR MATRIX	**20 (max.)**
3.1 Causal Model and Indicators: Include objectively verifiable indicators in the proposal that allow for an evaluation of the projects's scope, as well as of its products, results and impact. Produce indicators that measure beyond activities and products. **(10 points maximum)**	

3.2 Exit strategy: Describe an exit strategy and a follow-up plan for the activities after the end of the project, so that results can be considered sustainable. Describe the project's capacity to be replicated and scaled up after its conclusion. Show awareness of gender perspective. **(10 points maximum)**		
Subtotal 3. Indicator Matrix		
4. BUDGET		**30 (max.)**
4.1 Is the budget consistent and coherent with the proposed activities, as well as with other foreseen expenses relative to the program or project?		
4.2 Direct and indirect costs.		
4.3 There are acceptable expenses identified in the project and there aren't any expenses that are not coherent with the project.		
Subtotal 4. Institutional Capacity and Performance Record		
TOTAL SCORE (100 points maximum)		
RANKING*		**Excellent**
		Good
		Average
		Under the average
		Not recommendable

*Define the scoring ranges and the characteristics for each of them.

NARRATIVE SECTION
Please use this section to write down a bulleted list of your observations, commentaries and any other information that might be useful for the evaluation, and/or provide data for the qualifying organizations about areas to improve, so that they take this into account for the submission of their final proposal. Please do this as detailed as it is possible.
Strengths
Weaknesses
Suggestions

APPENDIX 2. MEMO: GRANT SELECTION PROCESS

NAME OF THE REQUESTING ORGANIZATION

[Full date]

I SUMMARY

(NAME OF THE ORGANIZATION) is consolidated as a reference organization in [PLACE] for [Brief desccription of the work done by the organization].

Our Mission

[…]

[Add a paragraph that provides information regarding the program or project that requires a grant and that also provides context for the participants]

- ✓ Background
- ✓ Objetive(s)

A total of (number of submissions) were received by email, all of which included the required documentation in order to participate. The following is a list of participating organizations:

1
2
3
4
5

In order to be considered for the process, the candidate organizations had to send their complete documentation and fulfill all of the requirements, the details of which were available at the Request for Proposals:

- ✓ Institutional CV in PDF format
- ✓ Letter of intent in PDF format
- ✓ Technical proposal including the following:
  - Project Description
  - Work plan
  - Indicator Matrix
  - Methodology scope
- ✓ Budget by category (excel)
- ✓ Narrative budget in Word format
- ✓ Federal Taxpayer Registry (Mexican organizations)
- ✓ Fiscal address (foreign organizations)

II SELECTION PROCESS

The Technical Evaluation Committee was composed of four (4) people that were in charge of evaluating hte organizations' proposals. The members were:

- Person 1 – Position at the institution
- Person 2 - Position at the institution
- Person 3 - Position at the institution
- Person 4 - Position at the institution

The Technical Committee of Evaluation took place on Month ddst of yyyy in [name of the place where the Committee took place] at [local time] in [name of the city and country] in order to evaluate, review and discuss the proposal submissions, according to the eligibility criteria that were defined in the Request for Proposals that was launched on Month ddst, yyyy.

The score was divided in four criteria, summing up to a total of 100 points maximum:

Evaluation criteria and assessment

Evaluation criterion	Score
Work plan	20 pts.
Methodology	30 pts.
Indictaor matrix	20 pts.
Budget	30 pts.

Score chart:

Score chart		
TOTAL, Compound score	**RATING**	**DESCRIPTION**
91 – 100	Excellent	Comprehensive and complete. Exceeds the requirements of the request. Has shown to have the ability to carry out responsibilities in little or no time. Has extraordinary qualifications and/or experience.
81 – 90	Good	Fulfills the requirements of the request. con los requisitos de la Convocatoria. Has shown to have the ability to carry out responsibilities in little time.
71 - 80	Average	Fulfills the requirements of the request but has some negative aspects.
- 70	Under the avergae	Does not fulfill the requirements of the request and has some important negative aspects.
Abajo de 60	Not recommendable	Does not fulfill the requirements of the request and has substantial negative aspects.

III RESULTS

The organization selected for a grant award is [**Name of the organization**], who got a higher general score after being evaluated by the Technical Committee of Evauation, considering all four evaluation criteria.

After evaluation, the elected organization is [**Name of the organization**], who has shown to fulfill the requirements established by [**Name of the requesting organization**]. The main reasons for the election of this organization were:

a Reason 1
b Reason 2
c Reason 3

The organization's score was **00.00%**

Technical Evaluation Committee Scoring

AVERAGE CHART		TOTALS
1		**0.00%**
2		**0.00%**
3		**0.00%**
4		**0.00%**
5		**0.00%**
6		**0.00%**
7		**0.00%**

IV EVALUATION COMMITTEE APPROVAL

Every member of the Technical Evaluation Committee approves of what is stated in this document and supports the decision regarding the election of the organization that will be awarded a grant. The following members' signatures ratify this:

(Full name, signature and date of every member of the committee)

[Full name and siganture]	Date

APPENDIX 3. POSITIVE NOTIFICATION LETTER

[DATE]

[NAME AND POSITION]
[NAME OF THE ORGANIZATION]

Subject: *Notification of the results of [Name of the Program] program by [Name of the requesting organization]*

[Name of the program] would like to thank you for your interest and participation on the request for proposals by Civil Society Organizations, as well as your dedication and commitment with the transformation of your community and country. Your contribution has been as valuable as it has been constructive for our program.

We would like to inform you by this means that your proposal "*Name of the proposal*" has been reviewed by the Technical Evaluation Committee (TEC) and it is our pleasure to announce that it has been selected for the next stage of reviewing and adjustments. It is important that you know that the final decision is still subject to the review and approval by [name of the grantor], as well as to the availability of funds. **We kindly ask you to have in mind that this letter does not constitute a formal approval of your submission nor a funding agreement.**

In this regard, we would like to share with you some commentaries and conditions for funding specifically written by the TEC for your proposal:

1 Recommendation 1
2 Recommendation 2
3 Recommendation 3
4 Budget
Make a list of the Committee's observations regarding budget.

Additionally, we would like to mention that very soon you will be contacted by staff members of [Name of the Organization] in order to schedule a call and/or visit to review the proposal, gather additional support documentation and work with your organization regarding the TEC's suggested adjustments and recommendations that should be taken into consideration for your submission to be successful.

Bear in mint that these conditions are binding. Please acknowledge receipt of this notification and respond to the TEC's conditions and recommendations to [person responsible for grants at the organization] before [date of deadline].

Thanks again for your participation in the Program. We would like to have a collaboration with you very soon.

Kind regards,

NAME OF THE ORGANIZATION

APPENDIX 4. NON-SELECTION NOTIFICATION LETTER

[Date]

[NAME AND POSITION]
[NAME OF THE ORGANIZATION]

Subject: *Notification of the results of [Name of the Program] program by [Name of the requesting organization]*

[Name of the program] would like to thank you for your interest and participation on the request for proposals by Civil Society Organizations, as well as your dedication and commitment with the transformation of your community and country. Your contribution has been as valuable as it has been constructive for our program.

We would like to inform you by this means that your proposal "*Name of the proposal*" has been reviewed by the Technical Evaluation Committee (TEC) and unfortunately it has not been selected for the next stage. (Highlight the strengths of the organization and the proposal). Despite your organization having wide recognition and previous work in the area where the project is being implemented, as well as verifiable capacity and experience administering international funds ans fostering local alliances, the TEC concluded that your proposed activities do not match the criteria established by our request, in terms of the secondary approach towards prevention, for the following reasons:

Describe in detail the organization's weaknesses or criteria that weren't met.

- Weakness 1
- Weakness 2
- Weakness 3
- Weakness 4
- Weakness 5
- […]

Thanks again for your participation in the Program. We're looking forward to a future collaboration with you very soon.

Kind regards,

NAME OF THE ORGANIZATION