

The Stevens Initiative
Strategic Plan Request for Proposals

Issue Date: September 19, 2017

Summary and Background

The Stevens Initiative is an international effort to build career and global competence skills for young people in the United States and the Middle East and North Africa by growing and enhancing the field of virtual exchange: online, international, and collaborative learning.

The Stevens Initiative is based at the Aspen Institute, an educational and policy studies organization based in Washington, D.C. The Institute's mission is to foster leadership based on enduring values and to provide a nonpartisan venue for dealing with critical issues.

The Stevens Initiative, conceived and developed in close partnership with the family of Ambassador Chris Stevens who died tragically in 2012, was inspired by the meaningful international exchange experiences that Ambassador Stevens had as a young man, which helped to shape the kind of diplomat he became. Such in-person exchange experiences are highly valuable in today's inter-connected world, yet less than one percent of young people have the opportunity to study abroad.

The Initiative builds on the pioneering work of the virtual exchange community. Recognizing the potential for significant impact that this work promises, and capitalizing on advances in technology, the aim is to make similar life-changing, cross-cultural experiences available to a large number of young people in sustained and meaningful ways.

Over the next three years, the Stevens Initiative will establish an outcome-oriented framework for virtual exchange, demonstrating high-quality methods by using common, proven indicators and measurement tools. The Initiative will continue to make awards to support virtual exchange programs that have potential to innovate, reach new communities, or scale up effective methods. The Initiative will prioritize monitoring and evaluation of awardees' activities and research in areas where critical information is lacking in order to build the quality framework, evidence base, and proof points to raise demand for virtual exchange among key decision-makers. As these assets are developed over the next few years, the Initiative will ramp up its activities to share effective practices (at first) and best practices (as they are identified) with practitioners and those in positions to launch or join programs. As virtual exchange becomes more widely known and potential or novice practitioners get access to best practices through publications and training events, the Initiative will launch a system to match implementation partners. The Initiative will pursue partnerships to bring resources to the field, including professional development, knowledge sharing, best practices, funding, and in-kind donations of technology from the private sector and non-governmental organizations. The Initiative will work consistently with stakeholders across the landscape to ensure its goals and activities meet the needs of young people.

Through this Request for Proposals (RFP), the Stevens Initiative is accepting proposals to assist in the development, design, launch, and implementation of an operational strategic plan and framework for assessing progress along several dimensions.

Proposal Guidelines

Proposals must be submitted by email to stevensinitiative@aspeninstitute.org no later than 5:00 p.m. U.S. Eastern Daylight Time on October 19, 2017. Questions about the proposal should be sent to stevensinitiative@aspeninstitute.org.

Proposals must include a narrative of no more than 10 pages, budget, and budget narrative. All costs must be itemized in the budget and explained in the budget narrative. If the organization proposes to subcontract any work to meet the requirements contained herein, this must be clearly stated in the proposal and the name of the organizations being contracted, as well as a description of the subcontracted organization and the work they would perform, must be included.

Contract terms and conditions – including scope, budget, schedule, and other aspects of the project – will be negotiated upon selection of an application and will be subject to review by the Aspen Institute.

Project Timeline

A contract with the selected applicant will begin no later than November 1, 2017. The project must be completed by March 2, 2017.

The start date will be finalized during contract negotiations, but the contract term will not exceed four months.

Project Purpose and Scope

The Stevens Initiative seeks a strategic plan for its upcoming activities to build on the achievements of its first two years. The strategic plan should include recommendations, supported by evidence and analysis, for the design and conduct of all Initiative activities, including grant-making and other field-building activities.

The scope of the strategic plan should be designed according to the following priorities:

- focus on how the Stevens Initiative can successfully grow the field of virtual exchange in the United States, and the MENA region, with attention to Morocco, and the United Arab Emirates, while also addressing opportunities for expansion and partnerships elsewhere;
- focus on virtual exchange at the middle school, secondary, and post-secondary levels, while also addressing opportunities to include young people in primary education or not enrolled in education;
- address methods that the Initiative can use with stakeholders – recognizing the potential value of champions at the household or classroom level as well as those at the district or state level – to spur the adoption of virtual exchange in the stakeholders’ communities.

Project Inputs:

- prioritize the inclusion of the perspectives of stakeholders in the virtual exchange field, including government and other supporters, grantees, VE practitioners, private sector leaders, educators, young people, and others; these stakeholders constitute the “supply” as well as the “demand” for virtual exchange, and the Initiative’s strategic plan has the potential to draw on their complementary knowledge and to chart a course that addresses their shared as well as their disparate interests, opportunities, and challenges;
- draw on input from Initiative staff; take into account findings from the landscape analysis conducted for the Initiative in Summer 2016 and to the Initiative’s draft strategic plan from Fall 2017;
- take note of the Initiative’s current thinking about the dimensions of growth for the field:
 - to grow the **reach** of the field, so that far more young people participate in virtual exchange programs;
 - to expand **access** to communities lacking that have not traditionally been able to participate in international exchange;
 - to increase **demand** for virtual exchange among educational institutions in the United States and in the Middle East and North Africa;

- to establish **ownership**, ensuring that participating communities have a voice in program design and that program outcomes directly address their needs;
- to make virtual exchange more **affordable**, which would reduce the barrier to access;
- to enhance the **quality** of programs by building a body of evidence about which methods are effective.
- the monitoring and evaluation plan designed by the Initiative’s external evaluators.

The strategic plan should:

- identify Initiative goals, outputs, and outcomes over the next five years, addressing the six dimensions listed above, with particular emphasis on growth strategies;
- identify specific metrics and propose milestones for a five-year period to track progress along the six dimensions listed above, creating a definition of success against which the Initiative’s progress can be assessed;
- recommend strategies and tactics to attain the goals, outputs, and outcomes in the areas listed above, including a timeline and a rationale for the sequencing of strategies and tactics over the five years addressed in the strategic plan; these recommendations should cover strategies and tactics for grant-making – such as the design and conduct of competitions and the support provided to grantees – as well as for other field-building activities:
 - research: identify key research questions that the Initiative needs to answer in order to achieve early proof points of success and convince key communities and stakeholders to participate in or support virtual exchange;
 - marketing and communications: identify communities and audiences that are a priority for engagement and communication, including strategies for reaching them;
 - partnerships: identify organizations – including companies, NGOs, foundations, and associations – that may serve as partners in supporting or propagating the field, noting the interests and incentives specific to each organization and the unique ways in which they may contribute;
 - practitioner support: identify which resources and modes of professional development should be offered to practitioners, educators, and other facilitators, and a timeline on which services and resources should be offered at various points in time;
 - advising: recommend a structure for stakeholder engagement, including a council of advisors and any other consultative body;
 - new technology: identify opportunities to integrate new tools, such as virtual and augmented reality, into virtual exchange;
 - sustainability: identify ways for the Initiative to enhance its sustainability for future years;
- identify the resources, including the Initiative’s human capital and other resources, needed to carry out the proposed strategic plan;
- address factors, including external factors such as the political landscape and the evolution of education technology (in the United States, the Middle East, North Africa, and elsewhere as appropriate), that present challenges and opportunities or may influence the success or failure of the Initiative.

Final Deliverable

The final format should be in the form of a report, PowerPoint presentation, and an executive summary that summarizes the findings.

Proposal Content Guidelines

Proposals should include:

- background of the applying organization, including the total number of full- and part-time staff and a description of the organization's experience with education, particular international education and technology in education;
- the theoretical and practical approach to the creation of the strategic plan, and why it is appropriate for the Stevens Initiative;
- the project management approach that will be used to complete this project;
- the steps to be taken to collect and analyze information;
- the sources of information that will be used, including written materials and interviews with stakeholders;
- the format of the strategic plan and all related documents;
- a clear set of outputs and deliverables;
- the timeline by which the outputs and deliverables will be achieved;
- explanation of the resources assigned to the proposed project, including staff members and contractors (listing names, titles, and roles on this project) who will work on this project, including those who will conduct the work in Morocco and the United Arab Emirates; CVs of proposed staff members and contractors should be attached to the proposal;
- examples of similar projects undertaken by the applying organization and by the individuals proposed to work on this project in particular;
- and testimonials from past clients regarding similar past projects.

Proposal Evaluation Criteria

Proposals will be evaluated according to the following criteria:

- appropriate methodology;
- appropriate scope;
- appropriate deliverables and timeline;
- appropriate budget, resources, and staffing;
- relevant experience and testimonials.

Incomplete or late proposals will not be considered.

For more information about the Stevens Initiative, go to www.stevensinitiative.org.