**Scope of Work for Open Space Facilitator**

**Johannesburg, South Africa**

**Request:** Open SpaceFacilitator for Open Space workshop in Johannesburg, South Africa

**Expected Period of Performance:** Maximum of 6 days domestic (preparation/technical support/debriefing) and 7 days overseas (travel /technical support/facilitation in Johannesburg, South Africa, other) for up-to a total of 13 working days beginning July 1st through August 31st, 2017.

**Background:** FHI-360, with support from the USAID/E3/LS Office, is organizing a two and one-half day Open Space event in Johannesburg, South Africa, August 14-17, 2017. Participants in the event will include 20 to 40 individuals nominated by FHI360 and participating USAID Missions. They will include NGO, cooperative and CSO leaders, academicians, donors and community foundation leaders, Mission and E3/Local Sustainability Office staff. The anticipated results of the Open Space will include identification and analysis of a variety of anticipated and unanticipated opportunities and challenges associated with the implementation of the localworks program (see illustrative list in Annex 1).

**SOW Objective:** Through this SOW theUSAID/E3/LS Office seeks to hire a Subject Matter Expert to provide Open Space technical expertise and facilitation support for preparations and implementation of the two and one-half day Open Space event in Johannesburg. The Subject Matter Expert/Facilitator is expected to organize, facilitate, close and document the results of the Open Space event.

LS Office requires that the Subject Matter Expert have broad background in development and a commitment to the *localworks* approach as well as being a recognized expert in Open Space technology. It is also expected that the Subject Matter Expert will work closely with FHI-360 and the USAID/E3/LS Office to organize and implement the Open Space event. Finally, it is strongly recommended that in addition to the aforementioned, the Subject Matter Expert also have a broad knowledge of systems thinking and complexity, social network analysis, and Asset Based Community Development (ABCD). This is to ensure that the facilitation of the Open Space event is handled in a way that fits within and is appropriate to the *localworks* context on promoting participant engagement with and reliance on local assets and resources to support development.

**Deliverables:** Specifically, the Open Space Subject Matter Expert/Facilitator will be expected to -

Pre-Event: work with the organizers: to clarify expectations; ensure that the physical facilities are consistent with the requirements of an Open Space Event; recommend text for invitational materials; recommend approach to event documentation; establish criteria for evaluating the event.

Event Facilitation: Prior to beginning of the event: provide input and guidance on the arrangements of the spaces to be used in conducting the event; brief the organizers on the Open Space approach to ensure that the event proceeds smoothly; work with organizers to arrange rooms, meals, breaks in a way consistent with the Open Space approach.

Facilitation: Present the Open Space approach: Who “owns” Open Space; the lack of formal structure; the anticipated results; what will happen; the physical elements (circle, wall space, meeting rooms); the Open Space guiding principles and Law:

1. *Whoever comes are the right people* ...
2. *Whenever it starts is the right time* ...
3. *Wherever it is, is the right place* ...
4. *Whatever happens is the only thing that could have, be prepared to be surprised!* ...
5. *When it's over, it's over (within this session)* ...

And the Law of Two Feet: If at any time during our time together you find yourself in any situation where you are neither learning nor contributing, use your two feet, go someplace else.

Work with the participants, primarily explaining, clarifying, coordinating, arranging and ensuring that subjects are identified, discussed, documented and presented. Should the need arise, resolve any conflicts or issues that could jeopardize Open Space results.

Event conclusion and documentation: ensuring that all discussion results are documented in no more than a 30 page report, and safeguarded and ultimately the report and all raw materials/notes are made available to the organizers in electronic form within 30 days after event. The submitted final report should include a narrative description of the approach and an evaluation of the Open Space event with recommendations for any subsequent actions.

**Required Experience and Qualifications:**

* Recognized by peers as a thought leader, expert and practitioner in the field of Open Space technology.
* Minimum two years of experience with implementation and facilitation of Open Space events/activities to support development
* Experience working on subject matter with international donor organizations, NGOs, and/or governments, preferably in an advisory or senior role.
* Demonstrated experience planning and conducting technical/action-learning events.

**USAID Point of Contact**

Shohreh Kermani-Peterson will serve as the main technical POC for this activity.

**Annex 1**

**Illustrative Questions: FHI-360 Open Space Event**

These questions are illustrative only and represent the types of questions that can potentially surface for discussion in the proposed open-space format. It is very likely that many questions will be asked that have not been considered at this time, and the answers to which will be extremely beneficial for the *localworks* program and Missions.

Program Design

1. What can be done to avoid market distortion and creation of organizations that become reliant on donors needs rather than communities needs when encouraging local organization access to local resources?
2. How do we ensure that local resource organizations empower and strengthen capacities of actors in the local development network/system to initiate, lead, own and sustain their own development?
3. What challenges (lack of information/access, political, cultural, ideological, other) inhibit local development actor access to local resource organizations? How can these be overcome?
4. What are characteristics of positive and productive relationships between communities, local organizations (e.g. cooperatives or NGOs), resource organizations and donors?
5. What does “success” look like, and who should define it and when?
6. What would be appropriate metrics for *localworks*?

Monitoring & Evaluation

1. Are monitoring and evaluation useful for facilitating locally owned, led and sustained development – why/why not?
2. What are characteristics of useful and productive monitoring and evaluation?
3. Who should conduct the monitoring and evaluation and how should it be done?

Sustainability

1. Who should define “sustainability” for a program/project/activity (local network, USAID/Mission, both, other)?
2. What are key characteristics of/requirements for meaningful sustainability?
3. When should need for “sustainability” be determined and who should make the determination?

Learning

1. Does constituent feedback increase the effectiveness of civil society organizations?
2. Is social network analysis useful? If so, how should these analyses be done?
3. Are there ways to do social network analysis, constituent feedback, measurement of social capital that are inexpensive, timely and accurate?
4. Does social capital play a role in sustainable development? If so, how can social capital to support sustainability be built and/or strengthened?
5. What makes a hub influential and how do hubs of influence change?
6. What additional lines of enquiry/learning should also be explored?