

REQUEST FOR PROPOSALS: Global Social Impact CEO Survey

Background

Based at Duke University's Fuqua School of Business, the [Center for the Advancement of Social Entrepreneurship](#) (CASE), is one of the world's leading academic centers on social entrepreneurship. CASE generates unbiased research, translates those findings into practitioner-friendly lessons learned, and trains leaders to apply these lessons.

Throughout our 15 year history, CASE has been obsessed with the question: *How do social entrepreneurs leap the chasm from idea to sustainable impact at scale?* This focus stems from the fact that, while some social sector organizations have scaled their impact dramatically, the impact generated by most organizations is small in relation to the scale of the problems they aim to address.

Therefore, CASE seeks to generate knowledge that enables social entrepreneurs and the system players with which they must collaborate to scale impact more effectively. CASE aims to capture the lessons learned from social venture leaders and impact investors that are driving social impact and to capture the challenges, opportunities and solutions that most effectively lead to sustainable scaling success.

To help answer these questions and identify other important social impact trends, CASE is developing the first **Global Social Impact CEO Survey**. This groundbreaking survey will build on CASE's reputation as a trusted thought leader in scaling impact, our extensive network of social impact and impact investing leaders, and the Fuqua School of Business's experience with the [Duke Global CFO Business Outlook](#) and [The CMO Survey](#).

Purpose / Project Description

The Global Social Impact CEO Survey will create a longitudinal study of the experiences and learnings of impact leaders at the CEO level, including nonprofit and for-profit social ventures and impact investors. The resulting reports and tools will provide a leadership lens on trends, perceptions, and predictions about achieving sustainable impact at scale.

CASE seeks a consultant and/or consulting team to partner with us in designing our strategy for implementing the Global Social Impact CEO Survey. This RFP covers the first two phases of work as outlined below. Depending on interest of CASE and the consultant(s), there may be an opportunity to contract with the same consultant / team to conduct survey implementation and analysis (phases 3-4 below).

Knowledge of the global social impact sector trends, latest research, and key players will be critical. Ideal candidates will also have prior successful experience in large-scale, national or international survey work.

All project-related intellectual property will be owned by CASE and the consultant will be required to sign CASE's non-disclosure agreement.

Consultant Activities

The consultant will work with the CASE team on the first 2 phases of work, with potential for extension to phases 3-4 depending on expertise and proposed budget:

- *Phase 1: Landscape Analysis* – Conduct a landscape analysis to determine where the proposed Global Social Impact Survey fits among current research. CASE’s key questions for this phase are:
 - What are the existing analogs and antilogs? Benchmark other surveys and tools in the social impact and other arenas and provide comprehensive summary data on the goals, audiences, questions, dissemination strategies, and formats of these tools.
 - What are other formats that CASE could consider (beyond/in addition to an online survey) for data collection and results dissemination?
 - What are the current gaps in knowledge in the market that CASE could uniquely fill?
 - Who would be the key consumers of information from such a survey, and how could it help them further their own work in support of sustainable social impact?
 - If discussed/ answered from the CEO perspective on a routine basis, what trend discussions / key questions would help the social impact field narrow the chasm from idea to sustainable impact at scale?

- *Phase 2: Proposed Models* – Develop 2-3 models for survey positioning and implementation. Along with CASE team, present initial findings and recommendations to the CASE Advisory Council at the February 9, 2017 Council meeting at Duke University. For each model, this should include:
 - Clear articulation of survey goals, including potential utility of survey findings for each of the key audiences
 - Description of ideal survey respondents and plan for reaching these respondents
 - Draft of topics to be covered in the proposed survey
 - Proposed process for data collection and review including timing and format (online survey, interviews, convenings, etc)
 - Description of target audience(s) and proposed end products (i.e., report, video, infographic, etc) and appropriate dissemination channels
 - Initial thoughts on potential partners if appropriate for model
 - Estimated costs and resources required to fully implement proposed model

After the meeting, incorporate feedback from Advisory Council in to a set of meeting notes and recommendations for next steps.

- *Potential Phase 3: Survey Design* – Based on feedback from Council meeting, work with CASE to design the global survey including finalization of question content, format and coding of survey tools. Ensure that questions resonate with voices from the nonprofit, for-profit, B-Corporation, and hybrid sectors by beta testing with target individuals and/or organizations.

- *Potential Phase 4: Survey Execution & Analysis* – Work with CASE to execute the Global Social Impact CEO survey based on CASE’s choice of recommended model. Analyze data and communicate results in comprehensive report and slide deck.

Consultant Deliverables

At a minimum the consultant will:

- Provide a detailed workplan outlining the process and timeline for completing deliverables.



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- Conduct a robust landscape analysis, detail findings in a written report, and prepare / present a succinct presentation deck to CASE staff and Advisory Council.
- Develop 2-3 DRAFT strategic options and timelines for survey positioning and implementation. Provide write-up of each strategic option and prepare / present a succinct presentation deck to CASE staff and Advisory Council to guide discussion.

As noted, this RFP only covers phases 1-2. Additional deliverables regarding potential phases 3-4 would be determined at a later date, if appropriate. If interested in pursuing phases 3 and 4 with CASE, please note this in your application and briefly state any experience you have in conducting similar work.

Timeframe / Schedule

The consultant should be able to start work immediately. Phase 1 deliverables and an initial draft of phase 2 deliverables must be ready for presentation by February 9, 2017. A proposed timeline for each deliverable component should be included in proposal package.

The consultant must be available to attend and present the initial recommended strategic options at CASE's annual Advisory Council meeting on Thursday, February 9, 2017 in Durham, NC.

The Consultant will report to:

- [Erin Worsham, Executive Director, CASE](#)

The Consultant will work closely with:

- Cathy Clark, Director, CASE i3 Initiative on Impact Investing and Co-Principal Investigator, Social Entrepreneurship Accelerator at Duke
- Robyn Fehrman, Director of Programs, CASE and the Social Entrepreneurship Accelerator at Duke
- Kimberly Langsam, Program Director, CASE and the Social Entrepreneurship Accelerator at Duke

Location / Travel

Location for this project is flexible, as work can be completed virtually. Recommendations for and anticipated costs of any proposed travel should be included in the proposal package.

To Apply

Please submit the following materials by January 5, 2017 via email to Robyn Fehrman, robyn.fehrman@duke.edu:

- Cover letter summarizing why you believe your experience is relevant to this assignment
- Proposal detailing the process you propose to use to complete required deliverables.
- Resume / CV for project leader and any key team members
- Budget detailing your costs to complete the required deliverables