

# Open Philanthropy Regranting Challenge - Round 2 Applicant Pack - [Applicant]

## Introduction

We are delighted to invite you to the final round (Round 2) of the Open Philanthropy Regranting Challenge. We were impressed with your Round 1 application, and we are grateful for the time and effort you have invested to this point. There are ten finalists and the final round will select one to five recipients for total funding of \$150M.

This document lays out the schedule of activities for the rest of the Regranting Challenge. The core of this final round is the development of a [proposal for additional funding](#). We will additionally conduct interviews with your grantees, speak with external reviewers, and continue our analysis of your historical grantmaking.

If you have any questions, please don't hesitate to email [regranting.help@openphilanthropy.org](mailto:regranting.help@openphilanthropy.org). We want candidates to make the best possible applications and can support you to do this.

## Schedule

- August 2: Open Philanthropy invites finalists
- August 3-10: Meeting 1: 60-minute introduction to the final round, answer any questions you have about the process
  - We have emailed to arrange this meeting<sup>1</sup>; you are free to decline this if the written material is clear or you would prefer to resolve queries by email
- August 30, 23:00 Pacific Time: Deadline for [legal & administrative questions](#)
- October 4, 23:00 Pacific Time: Deadline for [proposal for additional funding](#)
- October 14: Open Philanthropy sends questions on your proposal which we would like to discuss in Meeting 2
- October 24-28<sup>2</sup>: Meeting 2<sup>3</sup>: 120-minute discussion of your plan for additional funding
  - 30 minute presentation<sup>4</sup> of your proposal for more funding
  - 90 minute discussion of our questions on your proposal
- November 30: Final date for Open Philanthropy to communicate funding decisions to all applicants
  - We will try for sooner if we can

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<sup>1</sup> Please email [regranting.help@openphilanthropy.org](mailto:regranting.help@openphilanthropy.org) if you have not received this email. It will have been sent to the email address of the contact person we have on record for your application.

<sup>2</sup> This is a target and may move.

<sup>3</sup> We hope to record our formal meetings with you. As with all other material provided during the Regranting Challenge, we will keep these recordings confidential.

<sup>4</sup> We do not expect any new substance compared with your proposal submitted on or before October 4, and there is no expectation of slides or any other format of discussion. We can collectively choose to skip this section if we prefer and jump straight into questions.

We will send questions based on your submitted proposal for more funding on October 14 to be discussed live in Meeting 2. We do not expect written responses to these questions, but they might involve gathering some existing data or other preparation. We may have additional questions after Meeting 2 which we will communicate to you via email, and could involve another live conversation.

At any time, if you need to get in contact we can most reliably be reached through [regranting.help@openphilanthropy.org](mailto:regranting.help@openphilanthropy.org), which reaches the core team working on the Regranting Challenge (Alexander Berger, Emily Oehlsen, Chris Smith). Alexander is currently on parental leave but will be closely involved in the decision making process from his return in September.

### Legal & administrative questions (due August 30th)

We are inviting all finalists to discuss the process through which they would receive any funding through the Regranting Challenge with our in-house legal team. Please review the questions below and send your responses in an email addressed to both [legal@openphilanthropy.org](mailto:legal@openphilanthropy.org) and [regranting.help@openphilanthropy.org](mailto:regranting.help@openphilanthropy.org) by August 30, 2022. Please include the words “Regranting Challenge: Legal & Administrative Questions” in your email subject line. If it is difficult to meet this deadline because of summer holiday schedules, please let us know and we can work with you to resolve it.

- Who should attend Meeting 2 and any follow up discussions? These are substantive conversations with your program’s leadership team to review plans for future funding. Please include names, contact details, and timezones for the period October 24-28.
- Who should we contact in order to schedule Meeting 2 and any follow up discussions (i.e., who can coordinate on behalf of the group above)? Please include a name and contact details.

If you have any questions about this step, please email [legal@openphilanthropy.org](mailto:legal@openphilanthropy.org) and [regranting.help@openphilanthropy.org](mailto:regranting.help@openphilanthropy.org).

### Proposal for additional funding (due October 4, 2022)

We would like to read a proposal for how you would spend additional funding received through the Regranting Challenge, including your reasoning for why this is the best way to use incremental resources. Please review the questions below and send your responses in an attached PDF or word document to [regranting.help@openphilanthropy.org](mailto:regranting.help@openphilanthropy.org) by October 4, 2022. Please include the word “Submission” in your email subject line.

We would like your proposal to cover two possible levels of funding from the Regranting Challenge. We are asking for proposals to cover two funding levels because:

- We hope to understand your prioritization within additional funding (e.g. what you would do at the higher level of additional funding only) and your ability to absorb more funding

- We do not know exactly how many applicants will ultimately receive funding, but our budget is limited to \$150M and we want to retain flexibility

## Part 1: Introduction

1. In Round 1, we asked for your expected grantmaking budget for the next three calendar years. You answered: [[list their answer given in Round 1]]. Are there changes to your projections since you responded to that question?
2. If you received \$xxM in funding from the Regranting Challenge, what do you expect your grantmaking budget to be for the next three calendar years?

*We require at least budget maintenance.<sup>5</sup> That said, we recognize recipient programs may have the opportunity to crowd-in additional funding or obtain a match for our contribution. A match does not need to be guaranteed for it to be worth including in response to this question. We would like to know about firm commitments as well as more uncertain opportunities.*

3. If you received \$yyM in funding from the Regranting Challenge, what do you expect your grantmaking budget to be for the next three calendar years?

*See guidance immediately above.*

4. Are there rules governing your current budget that would not apply to funding from the Regranting Challenge?

*If our funding could be more flexible or less constrained than your current budget, please describe how that would allow you to have more impact.*

## Part 2: Proposal for an additional \$xxM in funding

*We understand your answers to these prompts will be your best guesses given current knowledge and planning and that your strategy will inevitably evolve as you learn. In general, the more detail you are able to provide us, the better.*

5. Narrative description of changes to portfolio strategy: How would you allocate a \$xxM contribution from the Regranting Challenge?

*Please focus on what you would be able to accomplish that you could not do without a \$xxM contribution from the Regranting Challenge. We are looking for a description of any major*

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<sup>5</sup> On our [announcement page](#), we said: “For candidates that are ultimately selected, we ask that their baseline funding (without Open Philanthropy’s contribution) does not decrease from the plans reported in their applications, so that our support can be genuinely additive to the program in question. For example, if a program says it plans to donate \$60 million from 2023 to 2025 (inclusive), and we grant \$60 million over those three years, we will ask that program to spend at least \$120 million over those three years.”

*changes in focus; new initiatives that you would launch; whether you would make more grants or larger grants of different kinds; whether you would enter a totally new geography, disease, product, pipeline stage, or thematic area; whether you would significantly expand one of your current priorities, etc. We recognize that you may not know all the details – for example you might plan e.g. to expand to one of five potential countries – but please share as much detail as you can, such as your current best guess as to the ranking of opportunities and what decision criteria you would use to finalize your decision.*

6. Prioritization: Why are you not pursuing these opportunities today given your current budget?
7. Grant investigation ideas: What are 3-6 concrete grant ideas that would be at the top of your list to investigate with this new budget?

*Please aim for 250 words per entry and answer the following questions: What idea would you investigate? Approximately how much funding would you consider putting behind this idea? This can be a sizable range if you are not sure. Why do you think this is a promising idea? Please connect this grant idea, even in a preliminary way, to your program's units of impact. What would success imply in terms of impact? How do you think about the likelihood of success?*

*We realize many of these ideas will be preliminary and likely under-developed – that's fine! In addition to the description of your strategy above, we want to get a sense for concrete ideas you have for grantmaking under this new budget, especially if you are proposing a new thematic focus. The focus and level of granularity will vary by applicant, but to give an example: in answer to question 5, you could describe plans to expand into a new geographic area; in answer to question 6, you could then describe why your current geographic areas are prioritized over expansion areas; and in question 7 you could describe, e.g., a pilot you would like to support, a gap in the existing research base for this new location that you intend to fill, a new platform you would like to introduce, a particular advocacy strategy you believe would be effective. Depending on your grantmaking, analogous discussions could be made for different pathogens, research areas, emissions sources, or something else.*

*You do not need to be certain that you would pursue all of these ideas, and you should feel free to describe known uncertainties. Given these ideas likely involve exploring new areas, we do not expect you to have grantees already in mind, but if you do please include their names and why you think they would be a strong grantee.*

*Please note you will not be confined or held to these ideas if you are selected; we will leave to your discretion how to spend any money awarded through the Regranting Challenge.*

8. Grant deep dive: Please describe **two** specific grant proposals that you have received or developed or developed in the past and decided not to fund at your current budget, but you would expect to fund with an additional \$xxM. These grant proposals can – but do not need to – overlap with the ideas you described in response to the previous question.

- Please provide the name of the grantee, the level of funding requested (over what time period), and a short summary of the work the grant would enable.
- Please provide a link to the grantee's website (if they have one). If you have an internal write-up that you are willing to share, please attach it to your submission<sup>6</sup>.
- Why do you consider this grant a good grant? Why was it a close call?<sup>7</sup>
- Why are you not pursuing this opportunity with your current budget?

*Please aim for 750 words for each of the grant deep dives. For this reason, we are asking that you choose real grant proposals that you evaluated in the past and declined (ideally it was a close call). That said, if you do not have any grant proposals that meet this criteria, that's fine – please choose a specific grant you would like to make in pursuit of one of the ideas you described in question 7 and describe it in as much detail as possible.*

*Please note you will not be confined or held to these ideas if you are selected; we will leave to your discretion how to spend any money awarded through the Regranting Challenge.*

### Part 3: Proposal for an additional \$yyM in funding

9. Please answer question 5 again with a focus on what you would be able to accomplish with \$yyM in additional funding that you would not be able to do with a \$xxM contribution from the Regranting Challenge.
10. Please answer question 6 again, responding to your answer to question 9.
11. Please answer question 7 again, describing up to **XX** additional grant ideas that you would consider with \$yyM but not \$xxM in additional funding.

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<sup>6</sup> Attachments here will not be counted towards the word limit.

<sup>7</sup> We described our approach to thinking about impact in Round 1: When we at Open Philanthropy evaluate our own grant making, we think about the expected impact of the grant on an outcome we care about (e.g. the number of lives saved, increases in average incomes, tonnes of CO2-equivalent emissions averted). When considering the impact of a grant, we try to think about it in counterfactual terms: we consider whether and how the funding enabled something which otherwise would not have happened (or the extent to which it accelerated an outcome) and how things might have gone differently if the work funded did not happen.

As a guideline, if your grant is focused on climate change, we'd like to understand what you think the impact of the grant would have been – if you had pursued it – in terms of tonnes of CO2-equivalent emissions. If your grant is focused on human health or economic development, we'd ideally like to understand how many people this grant would have affected / would have been on track to affect and by how much. We recognize that this approach to thinking about impact may have blindspots. If you do not think about your grantmaking in this way, or if there are additional ways you think about impact, we are interested in understanding why you think the grant you have chosen represents a good grant, however you wish to explain it.

*Do not answer question 8 again.*

#### Part 4: Strategic questions

12. Please share an org chart for your existing team<sup>8</sup> (you can send it as an attachment). What changes to your current team structure, size, and processes would be needed to spend this additional funding effectively? Are you limited on how much you can scale staffing to spend more money? If so, how would you overcome this?

- (Optional) If you expect to expand your team, which roles will be the most important for executing on your new/expanded strategy?

*Feel free to give one combined answer or to respond separately for the two funding levels. We remind you that we are open to applicants using funding from the Regranting Challenge to pay for new staff and other core costs needed to scale up grantmaking.*

13. How long do you expect to take to spend this money?

*When we talk about spending here, we mean making decisions on how money will be spent (i.e. we do not need a detailed answer about how funding is committed and then paid down)*

*Feel free to give one combined answer or to respond separately for the two funding levels. Our default is that recipients should aim to spend down our contribution 2023-2025, but we are open to both shorter and longer timescales for operational reasons or effectiveness considerations.*

**We have included several specific questions about your portfolio below. If you have addressed these questions in the course of responding to other parts of the application, please feel free to note that you have done so and skip them.**

14. [Add applicant specific questions here]

**The remaining questions are optional.**

15. (Optional) Is there a big idea that you cannot pursue with either your current budget or with the levels we have pitched, but you think is critical and deserves funding? How much additional funding would you need to execute on this idea?

*We want to give you the opportunity to think beyond the funding levels we have asked about. This is entirely optional.*

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<sup>8</sup> We are interested in your program team. There is no need for a description of your whole organization's structure.

16. (Optional) Is there anything else you would like to share with us?

*We want to give you the opportunity to share anything that you think is important that you were not able to cover elsewhere in your application. We are not expecting any particular responses in answer to this question, and it is entirely optional.*

## Grantee interviews

As part of our Round 2 process, we would like to speak with grantees of your organization. We will use these interviews to understand how grantees find the process of working with you and to understand how important your funding was to them relative to other sources of funding. We will keep the conversations confidential within Open Philanthropy and external reviewers specifically looking at your application.

We expect to speak to a maximum of four grantees per applicant as part of this process, and for each conversation to take less than one hour. We have shortlisted some grantees we would be particularly interested in speaking to below. This is only a suggested list, and we're open to alternative suggestions.

[\[Specific grantee requests vary by applicant\]](#)

We would be grateful for your support in arranging these conversations, practically by connecting us through email. We are happy to pay your grantees an honorarium of \$250 for the time taken to speak to us.



