

## GUIDELINES AND APPLICATION

# Soros Equality Fellowship 2017

### Fellowship Overview and Applicant Deadlines

The [Open Society Foundations](#) (OSF) seeks applicants for its inaugural Soros Equality Fellowship, which aims to support emerging mid-career professionals who will become long-term innovative leaders impacting the racial justice field. The Fellowship award provides individuals with:

1) a stipend ranging from \$80,000 to \$100,000 to support production of an innovative racial justice project over the course of 12 to 18 months; 2) leadership development training; 3) professional networking; 4) and other opportunities to advance their project and careers.

Before submitting a full proposal, all interested applicants **must submit** a one-to-two page, single-spaced, Letter of Inquiry, which outlines the topic of the project, proposed work product, and relevance to the guidelines listed below. Letters of Inquiry are due by Wednesday, November 16, 2016 (11:59 p.m. EST) and may be submitted online [here](#) beginning October 28, 2016. Within two weeks of the November 16th deadline, OSF will invite approved applicants to submit full proposals.

Invited full proposals are due by Monday, December 19, 2016 (11:59 p.m. EST) and must be submitted online (the online system will begin accepting full proposals from invited applicants on November 28, 2016). This document contains the full eligibility guidelines for the program (Part I, pages 3 – 8) and complete application information (Part II, pages 9 – 12).

### General

The Soros Equality Fellowship is based within the Open Society Foundations' [U.S. Programs](#) Equality team and seeks to support emerging mid-career professionals whom we believe will become long-term innovative leaders impacting racial justice. This approach recognizes the power of individuals to use a variety of tools, from traditional advocacy to [the arts](#), to impact change and uplift [the mission and values of an open society](#). The Fellowship award includes \$80,000 to \$100,000 over the course of the fellowship period, accompanied by the requisite skill building, mentorship, and support to ensure a fluid leadership pipeline between early career promise and later-career expertise. We seek a diverse cohort of applicants and finalists pool, including activists, artists, journalists, and organizers, to produce projects with meaningful impact.

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This Fellowship is also intended for a much broader universe than the traditional civil rights activist and contemplates support for individuals spanning a variety of fields. Its main goals are to support an individual's advocacy, artistic expression, cultural impact, community empowerment, narrative change, public opinion efforts, or technology innovation. For example, it might attract a free-lance journalist to produce a year-long investigative series, a documentary filmmaker to produce a short film examining the intersections of race and gender, or a coder to create anti-racial profiling software. We invite applicants to be bold, innovative, unprecedented, and audacious in their submissions. In the advocacy realm, the aim is to support outstanding individuals—including lawyers, advocates, grassroots organizers, researchers, and others with unique perspectives—to undertake efforts to combat racism and xenophobia at the local, state, and national levels. Projects may range from impact litigation to public education to coalition-building to grassroots mobilization to policy-driven research. The aim of the Fellowship is to incubate innovation, promote risk-taking, and develop new ways of thinking that challenge our existing assumptions. The proposed project should add considerable value to the racial justice field and inspire new approaches to address issues of disparity and discrimination.

An additional and equally important goal of this Fellowship is to increase applicants' leadership capabilities. As part of the Fellowship, selected finalists will receive leadership development training, mentorship, and networking opportunities. This aspect of the fellowship reflects our intent to increase fellows' existing skill set and to confer a concrete set of benefits to the individual.

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## PART I: GUIDELINES

### Fellowship Projects

#### **Our Goal: Increasing Capacity to Combat Racism and Xenophobia**

There is an entrepreneurial spirit that guides the Open Society Foundations' (OSF) approach to seemingly intractable problems such as structural racism and xenophobia. Through this Fellowship, OSF aims to provide promising leaders with the support they need to develop great ideas to combat racism. More specifically, we are looking to fund projects that align with the Equality team's approach to racial justice. This approach:

- *Rejects the 21<sup>st</sup> century post-racial myth, which claims that by acknowledging race and ethnicity, we promote racism and xenophobia. It instead embraces the value of acknowledging the discriminatory impact that certain seemingly race-neutral policies can have on immigrants and communities of color.*
- *Believes that documenting this disparate impact and the ongoing role of discrimination provides a platform for others to question the legitimacy of structures that limit access to democracy, justice, education, and the economy.*
- *Recognizes the enduring power of language, image, media, the arts, and public opinion to combat or perpetuate discrimination against immigrants and people of color in the United States and across the globe.*
- *Prioritizes the dismantling of structures that perpetuate discrimination and limit access over the targeting of individual actors who engage in discrimination.*

#### **Specific Equality Team Priorities**

Currently, the Equality team has three top priorities for its work:

- 1) Building the capacity of the racial justice field to combat structural racism and xenophobia;
- 2) Creating sustainable organizations capable of empowering the communities they serve; and
- 3) Changing the racial narrative to one that removes the distortions of racism and xenophobia as a barrier to equal opportunity.

#### **Project Guidelines**

These fellowships are not a proxy for organizational grants—the project must be the creation of the individual applicant and confer a professional benefit to that individual. Projects should have an explicit anti-racism focus and fall within one of five suggested categories: technology, arts, journalism, academic research, or advocacy, but **not include any electioneering, lobbying, or other activity that does not fall within [IRS 501c\(3\) guidelines for private grants to individuals](#)**. These categories and example projects are just guidelines, and there is no requirement that each category be fulfilled in an individual fellowship class.

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### **Advocacy Strategies Supported by the Soros Equality Fellowship “Combating Racism” Requirement**

Applicants may employ, either alone or in combination, any number of strategies to achieve the goals and objectives set forth in their projects. These strategies include but are not limited to:

- Impact litigation
- Public education
- Strategic communications
- [Arts, culture, and media](#)
- Policy advocacy
- Coalition-building
- Grassroots organizing and mobilization
- Policy-driven research and analysis

Fellows are expected to make their projects full-time work during the term of the fellowship.

### **Media Strategies Supported by the Soros Equality Fellowship “Combating Racism” Requirement**

The Soros Equality Fellowship also supports writers, print and broadcast journalists, bloggers, filmmakers, and other individuals with distinctive voices proposing to complete media projects that engage and inform, spur debate and conversation, and catalyze change on important U.S. racial justice issues. The Equality Fellowship aims to mitigate the time, space, and market constraints that often discourage individuals from pursuing vital but marginalized, controversial, or unpopular topics in comprehensive and creative ways. Fellows are expected to make their projects their full-time work during the term of the fellowship.

Projects that wholly or primarily involve documentary photography (production or distribution) are not eligible for funding. For information on support for these types of projects, please see the Open Society Foundations’ [Documentary Photography Project](#).

### **Arts & Culture Supported by the Soros Equality Fellowship “Combating Racism” Requirement**

The Soros Equality Fellowship also supports individual artists and art collectives proposing to apply their practice (visual art, music, dance, theater, literature, poetry, social practice, and interdisciplinary forms) towards the completion of a project that will engage and inform, spur debate and conversation on important U.S. racial justice issues. The Equality Fellowship aims to mitigate the time, space, and market constraints that often discourage individuals from pursuing vital but marginalized, controversial, or unpopular topics in comprehensive and creative ways.

### **What Qualifies as a Completed Project for the Soros Equality Fellowship?**

Regardless of the strategy employed or the issue addressed, *all Fellowship projects must, during the term of the fellowship itself, actively seek some measurable form of combatting racism*. We generally define “combatting racism” as a change in attitude or perception, increased attention to a disparity, or a change to a policy or practice, whether formalized by law or not, that has a particular effect on individuals or communities. Combatting racism can promote or create good policies or practices, as well as change or mitigate the effects of bad ones. Moreover, these efforts should involve more than simply obtaining a specific result for a specific person; instead, groups of people defined by certain characteristics or circumstances should benefit from achieving a particular change.

Applicants must propose deliverables or work product/content that reflects a year’s worth of full-time work. We leave it up to each applicant to determine the scope of the project deliverables

and to make a convincing case that the work is sufficiently ambitious. *However, in all cases, deliverables must aim to reach audiences during the term of the fellowship itself*, i.e. the program will not support projects that involve *only* research, planning, or other activities that simply “lay the groundwork.” For advocacy projects, this requirement means that there should be at least the theoretical possibility, based on your activities and actions during the Fellowship, that the change you want to see will come to pass during the term of the Fellowship itself. In other words, projects that involve *only* planning, conceptualizing, researching, strategizing, or otherwise “laying the groundwork” during the term of the Fellowship are unlikely to fare well in our process and will not be considered.

## Fellowship Stipend

Fellows will receive a stipend ranging from \$80,000 to \$100,000, depending on the chosen duration of the fellowship (between 12 to 18 months), salary history, seniority, geographic location, and work experience. The stipend will not necessarily equal the applicant’s current salary. Fellowship stipend amounts will be determined on a case-by-case basis. In addition to the stipend, fellows will receive a small project budget up to \$4,000. That budget may include expenses such as travel (including airfare and hotel), conference fees, and health insurance. Fellowship expenses cannot include operational or programmatic costs, such as employees and physical infrastructure.

The purpose of the fellowship is to support individual fellows; therefore the program will only cover individual expenses. The fellowship does not fund enrollment for degree or non-degree study at academic institutions, including dissertation research. Please note grants to fellows are considered public information and the fellow’s name and project description will be included in OSF’s audited financial statements, as per IRS regulations.

## Eligibility

### Education

Applicants must have at least a high school diploma or equivalent.

### Fellowship Term and Time Commitment

Though most fellowship terms are for one year, the program will consider requests for projects lasting up to 18 months. Applicants must be able to devote at least 35 hours per week to the project if awarded a Fellowship; and the project must be the applicant’s only full-time work during the course of the Fellowship. Fellows cannot be full-time students during their Fellowship. In addition, if awarded a fellowship, applicants must be available to attend the following activities during the fellowship term: New Fellows Orientation (tentatively set for March 2017 in New York City); the annual Soros Justice Fellowships conference (tentatively set for either the Summer or Fall of 2017); the Soros Equality Fellowship retreat (tentatively set for either the Summer or Fall of 2017); fellowship class network calls; and a project completion event in 2018. Exact dates and location will be announced in due course.

### Host Organizations

Fellowship applicants are encouraged, but not required, to secure a host organization. Host organizations – which can be advocacy or community groups, scholarly or research institutions, government agencies, or other nonprofit organizations or associations – can provide access to resources such as space, technology, and networks, as well as mentoring and guidance. They can also enhance the credibility and raise the profile of the project. The fellowship program encourages host organizations to provide in-kind contributions such as office space and necessary overhead. Host organizations may also

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augment the stipend award and provide other benefits. The fellowship program does not provide the host organization with supplemental funds. Fellows working with a host organization must submit a letter of commitment for approval by OSF that details the parameters of the relationship before beginning any project under this fellowship.

Projects proposed in conjunction with host organizations are evaluated in part on the extent to which the host organization is the right fit for the project and the applicant. However, if awarded a fellowship, the individual applicant ultimately is responsible for the work; and the fellowship “attaches” to the individual, not the host organization. The individual has the right, with the prior approval of the fellowship program, to take the fellowship to another host or choose to do the work without a host organization.

Applicants can, at the time of the application, be employed by the same organization that would serve as their fellowship host organization. However, such arrangements typically raise questions about whether the fellowship is simply intended to replace organizational resources that otherwise would or should support their work, i.e. to fund existing staff positions. Accordingly, applicants in this situation must convincingly demonstrate that the work they will be undertaking as part of the fellowship is not work that they had already been doing or would otherwise be tasked with.

Applicants choosing not to partner with a host organization must convincingly articulate how they will achieve the project goals without the infrastructure and support of an established organization or institutional base.

### **Projects Based Outside the United States**

Applicants may be based outside the United States, provided their work directly pertains to a U.S. racial justice issue.

### **Lobbying**

Projects that include lobbying activities will not be funded. Please carefully review the [Tax Law Lobbying Rules](#) before submitting an application. If awarded a fellowship, applicants are required to attend a training session on the tax law lobbying rules, conducted by the Open Society Foundations’ General Counsel’s Office; and must agree to refrain from engaging in restricted lobbying activities during the term of the Fellowship.

## **Selection Criteria and Process**

### **Letters of Inquiry**

Applicants are required to [submit](#) a one- to two page, single-spaced, letter of inquiry that outlines the topic of the project, proposed work product, and relevance to the statements above.

Letters of Inquiry should address the following questions:

- What is your professional background to carry out the proposed project?
- What is the central argument of your proposed project as it relates to the statement?
- How does your project advance or challenge current thinking?
- Who is/are the intended audience/s and how will you ensure the work product

- reaches the anticipated audience?
- What are the potential work products?
- How does your project contribute to the racial justice field?
- How would this fellowship further your skills and experience and help you transition your leadership in the racial justice field?

Letters of Inquiry will be reviewed within two weeks of the submission deadline. Inquiries showing promise will be invited to submit a full proposal. Unfortunately, we do not have the staff capacity to provide specific feedback on all inquiries. In general, we strongly discourage re-submitting unsuccessful Letters of Inquiry.

Once a letter of inquiry has been reviewed, the applicant may be invited to submit a full proposal. **We will not consider any uninvited applications for the fellowship.**

### **Request for Full Proposals**

Once a letter of inquiry has been reviewed, the applicant may be invited to submit a full proposal. Those invited to apply may receive some feedback before being asked to submit a full proposal.

Applications will be evaluated on the extent to which the applicant possesses the vision, drive, and skills needed to broaden understanding, spur debate, or catalyze change on the issues at the heart of the Open Society Foundations' U.S. racial justice priorities. A reading committee consisting of Open Society Foundations staff and outside experts in the field will review proposals and nominate between ten to 15 finalists. The finalists will be invited to interview with a selection committee consisting of Open Society Foundations staff and outside experts. From the pool of finalists, five to seven individuals will be awarded fellowships for 2017.

Under certain circumstances, Fellowship program staff may, at different points in the selection process, reach out to specific candidates by phone or email to get answers to questions that may help us determine whether to select someone as a finalist or to award a fellowship.

In evaluating applications, the program will consider:

#### **Project Treatment:**

- Does the project treat an issue that is relevant (i.e. involves one or more of the Equality team's specific priorities)?
- Is the project treatment of the issue effective (i.e. it offers an in-depth, incisive, new, or creative treatment of an issue related to the Equality team's priorities)?
- Is it strong (i.e. it reflects good background research and a clear understanding of the issue)?

#### **Project Viability:**

- Is the project sufficiently engaging and innovative (i.e. original, compelling, and timely enough to interest its target audiences)?

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- Will the project have a positive contribution to the racial justice field and show promise for meaningful impact?

**Project Budget and Timeline:**

- Is the plan for the budget reasonable given the scope of the project?
- Does the timeline reflect a professional understanding of the requirements of the project?
- Is the timeline realistic and identify key benchmarks?

**Applicant:**

- Does the applicant possess the credentials, professional skills, and discipline needed to accomplish the project?
- Does the applicant have the talent, commitment, and ability to work independently to accomplish this project?
- Does the applicant have the necessary professional connections to ensure that the proposed project will be accomplished?
- Will this project benefit the applicant's professional development?

*PLEASE SEE NEXT PAGE FOR APPLICATION*

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## PART II: APPLICATION

### Application Information

The full proposal application deadline is **Monday December 19, 2016 (11:59 p.m. EST) for applicants that have been invited to submit full proposals.** Incomplete applications will not be given full consideration.

#### Online Submission

Applications must be submitted online. Those invited to submit a full proposal will receive instructions for online submission via e-mail. *The online system will begin accepting applications on November 28, 2016.*

On the online system, applicants will have to provide basic contact information and register with the system. Once registered, applicants will be able to proceed to the application itself. All communications with applicants will be sent to the email used to register with the online system, so applicants should ensure that email communications from us do not end up in their “Junk Mail” folder.

#### Content of Complete Applications

Complete applications consist of a number of items that must be uploaded to the online application system:

1. Cover Page
2. Resume or CV
3. Project Proposal
4. Three Letters of Recommendation (including the Host Organization Letter of Commitment if applicable)
5. Publisher Letter(s) (book proposals only)
6. Samples of Previous Work (arts, technology, and media projects only)

#### Cover Page

Each application must include a single-spaced cover page, which includes the following information:

Name:

E-mail Address:

Phone Number:

Permanent Mailing Address:

Title of Project Proposal:

Host Organization (if applicable):

#### Resume or CV

Each application must include a resume or CV of no more than three (3) pages.

## Project Proposal

Each application must include a single-spaced **PROPOSAL** of no more than 3,000 words (approximately six pages in 12-point font with one-inch margins) containing responses to the five (5) questions listed below in order, with the headings as listed below, i.e. Project Synopsis, Project, Personal Experiences, Skills, and Attributes, Timeline, etc.:

**Question 1 (Project Synopsis):** *“Provide a synopsis of the project that describes: the issue your project will address and why this issue is important, your methods for addressing the issue, how the work is related to one or more of the Equality team’s priorities, and how you expect your project to be one that will inform and engage, spur debate, open up new conversations, or catalyze action.”*

Your response to this question should reflect extensive background research on the issue, as well as a sufficient understanding of the work that others have done or are doing on the issue; and should suggest how your project fills a significant gap or otherwise represents an important contribution to, or departure from, similar/related work.

**Question 2 (Personal Experiences, Skills, and Attributes):** *“Explain how, based on your experiences (personal, professional, academic, etc.), skills and attributes, you are the right person to carry out this particular project, and how the Fellowship would benefit you in your future work.”*

**Question 3 (Timeline):** *“Lay out a timeline that sets forth the project’s specific activities and reflects all phases of the project, as well as the time you will allocate to meet your specific objectives.”*

**Question 4 (Budget):** *“In order to give us a general sense of the overall cost of your project exclusive of your daily living expenses, briefly outline a budget that shows any project-related expenses, including research and travel costs, supplies, and finishing and distribution costs, as well as expected income from sale of stories or from other funders (the Open Society Foundations will cover up to \$4000 of project-related expenses above and beyond the fellowship stipend).”*

**Question 5 (Time Commitment):** *“Describe any non-fellowship work responsibilities (e.g. freelance work, consulting, hourly project-based work, etc.) or educational commitments (e.g. classes for a post-secondary degree) that you expect to have during the course of your fellowship, including the approximate time to be devoted to these responsibilities/commitments.”*

## Letters of Recommendation

Each application must include three (3) **LETTERS OF RECOMMENDATION** from supervisors or close colleagues. If working with a host organization, one of these letters **MUST BE FROM THE HOST ORGANIZATION**. The letters should address your talent, professionalism, and demonstrated ability to work independently to complete long-term, in-depth projects; as well as any other matter that you or your letter writers deem relevant to our assessment of you or your project. Letters should not be more than two (2) pages in length. We encourage you to share your proposal narrative and the fellowship program’s selection criteria (see “Selection Criteria and Process” above) with those who write on your behalf.

**Host Commitment Letter** (not applicable if applicant chooses to proceed without a host)

This letter counts toward the three required letters of recommendation for those applicants affiliating with an institution. The letter should be on the organization's letterhead and written by a senior staff member of the organization or someone otherwise authorized to commit the organization to serving as a host for the project. The letter should describe the following: host organization's mission and existing work; how the proposed project fits with the organization's mission and existing work; support provided to the applicant, if awarded a fellowship (e.g. supervision, access to networks, guidance, etc.); in-kind contributions provided (e.g. office space; computer, phone and facsimile access; administrative support); and any other resources provided to the fellow (e.g. supplemental funds). The letter must also include a confirmation that the proposed project will not duplicate the host organization's existing efforts and that fellowship funding will not be used to replace, supplant or supplement funding for activities or projects already being, or reasonably expected to be, carried out by the host organization. The host organization may also be required to enter into a memorandum of understanding with the Open Society Foundations.

**Publisher Letters (for book projects only)**

If proposing a book project, completed applications **MUST INCLUDE A LETTER FROM YOUR PUBLISHER** agreeing to publish the book or two (2) letters from publishers that have expressed strong interest in the book. Letters should not be more than two (2) pages each.

**Samples of Previous Work (for arts, media, and technology projects only)**

If proposing an arts, media, or technology project, complete applications **MUST INCLUDE SAMPLES OF YOUR PREVIOUS WORK:**

*Print journalism or books* should upload three (3) samples of previous work (applicants proposing books should include excerpts of the book, if available, as one of the samples). Each sample should be of no more than ten (10) pages.

*Radio or audio applicants* should upload three (3) samples of previous work.

*Film and video applicants* should upload the proposed project (fine cut or rough cut) *and* an additional sample of previous work.

*Technology and arts and culture applicants* should provide a link to (3) samples of previous work.

Applicants proposing projects involving *other forms of media* should upload three (3) samples of previous work.

Applicants proposing projects that involve *multiple forms of media* (e.g. print and radio) should themselves determine which types of samples to upload; but in no case should more than three (3) samples be uploaded, whatever the media format (e.g. 2 print and 1 radio).

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## Application and Selection Timeline

Letters of Inquiry Due:	November 16, 2016 (11:59 p.m. EST)
Solicitation of Full Proposals	November 28, 2016
Application Deadline:	December 19, 2016 (11:59 p.m. EST)
Finalists Notified: via finalist)	Early January 2017 (all applicants will be notified email whether they have been selected as a
Finalist Interviews:	Week of January 16 <sup>th</sup> , 2017 (all finalist interviews will be held on the same day, to be determined, at the Open Society Foundations offices in New York City)
Selected Fellows Notified:	February 2017
Projects Begin:	Spring 2017