



## **Request for Qualifications**

**For consultants with experience & expertise  
in nonprofit organizational development**

***Submission Deadline: May 31, 2022***

## **Background**

The [Embracing Disruption](#) Cohort is a 17-month cohort program developed to support late start-up to early Mature organizations navigate the ever-changing environment through a Lifecycles approach to organizational development. Based in the Nonprofit Lifecycles model developed by Susan Kenny Stevens, PhD., this program is designed to host 5 organizations through a brief self-assessment, planning process and capacity implementation period. While similar to POWER and ADVANS, the Embracing Disruption Cohort program focuses on building organizational resiliency in the ever-changing environment.

The program design uses similar concepts from the [ADVANS](#) program developed under the direction of organizational consultant, following a “meet them where they are” approach known as the Lifecycle Approach to capacity building.

The Foundation launches this new capacity building initiative with lead consultant, Jennifer Bonnett, MPA, CLCC, CEO & President of the Nonprofit Lifecycles Institute.

**Embracing Disruption** will kick off in September 22, 2022. The cohort will participate in a 17-month capacity building initiative culminating in February 15, 2024, designed to strengthen the operating capacity of five late Start-up to early Mature organizations in our funding area. The Foundation recognizes that the organizations in the late Start-up to early Mature lifecycles stages may have been shaken by the effects of 2020 disruptions. The Foundation further recognizes that these organizations may have been developing their capacity steadily, yet, the changes stemming from 2020 disruptions require a moment of reflection to adjust, refine, and plan for an uncertain future.

The **Embracing Disruption** cohort program will support the organizations as they reflect on their current lifecycle to inform their best strategy forward. Embracing Disruption differs from previous cohort sessions by focusing the bulk of time and attention to supporting organizations through the capacity improvement period, with more emphasis on financial scenario planning, budgeting, and embedding equity throughout the assessment and implementation periods.

The Foundation will support the organizations in this cohort program with a financial investment in their capacity improvement plan and with the support of a Lifecycles Capacity Consultant to work with the organization throughout the program.

Gifford will select five organizations to participate in this pilot round of Embracing Disruption based on the following criteria:

- Organizations must be receptive to change
- Strong Leadership
- Organizations must be “Ready, Willing, and Able”
- Be able to field a leadership team- minimum 4 people to each leadership team
- Leadership Team members need to be committed to stay with the team to monitor the progress of the capacity work plan and stay engaged for the entire 17-month.
- Be an organization most recently in the late Start-up to early Mature phase
- Organizations must have ongoing programming that is critical to the community
- Serve Onondaga, Madison, or Oswego Counties

## Role and Expectations of Consultants

Each participating consultant must be able to make a 17-month commitment to work with one selected nonprofit organization and be willing to utilize the Lifecycles Self-Assessment tool and techniques developed by Dr. Stevens as outlined in the book *Nonprofit Lifecycles™*. A copy of the *Nonprofit Lifecycles™* book will be provided to each consultant. The first four chapters of this book should be read prior to phone or zoom interviews.

If selected, consultants will be matched to one of five selected nonprofits to serve as both a guide and a coach. Additionally, participating consultants are required to attend the following professional development trainings:

- Full day DEI Lifecycles Workshop, August 25, 2022
- Half day (morning) Embracing Disruption Orientation August 26, 2022
- Lifecycles Finance, September 22, 2022
- Successfully completed an [Intro to Lifecycles Consulting workshop](#) before the first cohort meeting.

Consulting activities include:

- Facilitating the grantee's individual "Selfie" using certain components of the *Nonprofit Lifecycles™ Assessment* model, to identify a few key capacity building opportunities to focus on during the program term. The development of a correlating Work Plan to address these opportunities, which will serve as the basis for the capacity coaching and resources to be provided over the program term;
- Helping grantees identify their lifecycle capacity challenges; help to develop an effective approach to improving capacity in identified areas; and how to best utilize a \$15,000 financial investment from the Gifford Foundation;
- Serving as the grantee organization's consultant/coach for capacity improvement and habit change activities throughout program term;
- Attendance at all Cohort Consultant and Leadership Team meetings/learning sessions (there are 6 of each scheduled over one (17-months);
- Communication with Lead Consultant, re: progress, concerns, ideas, etc.
- Providing final written reflection of the work you have done as well as insights you have learned as part of your work in Embrace.

Participant Consultants will be paid \$13,000 over the program term to complete the program (estimated of 86 hours at \$150/hr.);

- Completion and approval Self-Assessment and Work Plan -- \$5,000 (December 2022);
- Ongoing Participant Coaching/Consultant and Leadership Team Meetings \$8,000, payable in three installments - June 2023 (\$3,000), October 2023 (\$3,000), March 2024 (\$2,000)

Consultants who have not previously completed a full day *Intro to Nonprofit Lifecycles Consulting* **must** complete the mandatory training on June 16 – 17, 2022 (2 half days, 12 – 3p ET).

In addition to compensation for their services, consultants will receive additional training and support from Lead Consultant, Jennifer Bonnett, as well as participate in a learning cohort with their peers.

### **Responding to the RFQ and Selection Process**

This Request for Qualifications is part of the screening process the Gifford Foundation is undertaking to identify and grow their pool of consultants with experience and expertise compatible with the objectives of the Embracing Disruption program.

Consultants who are successful in Lifecycles capacity building programs share these characteristics:

- Are successful, independent consultants working within the nonprofit sector, have been in business for a minimum of two years, and have the ability to acquire clients and effectively complete a wide variety of projects.
- Are experienced in individual and group dynamics, have the wherewithal to get a group and project “back on track” when it strays, and are comfortable with ambiguity.
- Have, through their consulting experience, identified the lifecycle stages they are most successful working in and have developed methods for working within those lifecycles.
- Completely understand the “meet them where they are” philosophy and take a holistic approach to organizational development.

Also, on an ongoing basis the Foundation taps into local consultant pools to assist organizations with a variety of nonprofit management needs and issues, including but not limited to: board development and training, leadership coaching, succession planning, organizational assessment, strategic planning, fund development, business planning, human resources, marketing, etc.

Potential consultants are asked to respond to this RFQ with a letter stating your response to the following questions:

1. Your interest and capabilities in participating as a consultant in this program;
2. Your understanding and/or experience using a version of Lifecycles self-assessment to launch capacity building initiatives. If you have specific experience using a Lifecycles Selfie to launch capacity improvement initiatives, please elaborate;
3. Describe your consulting practice, years in business, core values and your interest and capabilities in participating as a consultant in this program;
4. Describe your ability to efficiently and effectively move a large-scale project with numerous stakeholders forward with limited time and resources.
5. Your primary skill set regarding capacity issues such as governance, finance, marketing management systems, program development, visioning etc., as well as the lifecycle stage in which you feel most comfortable working;
6. Include a set of nonprofit references and a list of your nonprofit clients (past 2 years);
7. Your hourly/daily billing rate for nonprofit clients;
8. Your ability to take on new clients during the timeframe of this program;

9. Attach your resume and/or information about you and/or your firm.

- If you are not interested or available for this program but are interested in being listed on our consultant database on the Foundation's website please contact us.

Preference will be given to consultants who have a holistic approach to organizational development with an experience and an in-depth understanding of planning within changing environments.

Qualified consultants will be contacted no later than the week of June 7, 2022 to schedule a teleconferenced interview prior to June 30, 2022, with Embracing Disruption Lead Consultant, Jennifer Bonnett. Once screened, consultants will be chosen based on best match to selected grantees' capacity needs. Grantee/consultant matches will be made by July 31, 2022.

### **Embracing Disruption Timeline**

Participation in Embracing Disruption has the highest concentration of work occurring from September 2022 through December 2022.

The schedule below is subject to change, but is provided to ensure complete understanding of the expectations of participating consultants. A similar timeline will be provided to each participating organization.

#### **Phase One: Program Design, Consultant and Grantee Selection (May 2022 – September 2022)**

<b>Date</b>	<b>Activity</b>
May 31, 2022	Deadline for receipt of consultant qualifications
June 16 – 17, 2022 (2 half days, 12- 3p ET)	Consultant Training for Intro to Lifecycles Consulting
By June 30, 2022	Consultant Interviews <ul style="list-style-type: none"><li>• Consultant must read the first four chapters of <i>Nonprofit Lifecycles</i> before scheduled interviews</li></ul>
July 31, 2022	Consultant Final Notification & Grantee Match
August 25, 2022 Full Day	DEI Lifecycles Workshop
August 26, 2022 9a - 12p ET	Embracing Disruption Consultant Orientation
September 22, 2022 9a– 12p ET	Consultant Budget/Finance Training

#### **Phase Two: Self-Assessment/Work Plan Process (September 2022 – February 2023)**

<b>Date</b>	<b>Activity</b>
September 22, 2022	1st Leadership Team Orientation Meeting (Consultants & Grantees)
December 15, 2022	1 <sup>st</sup> Consultant Payment \$5,000
December 15, 2022	Organizational Selfie Due  Lead Consultant to review, quality assure, provide feedback and approval
December 15, 2022	Organizational Capacity Improvement Plan Due  Lead Consultant to review, quality assure, provide feedback and approval
December 15, 2022	2nd Leadership Team Cohort Meeting (Consultants & Grantees) <ul style="list-style-type: none"><li>• 2<sup>nd</sup> Leadership Team Cohort Meeting – learning session</li></ul>

	<ul style="list-style-type: none"> <li>2<sup>nd</sup> Consultant Team meeting to debrief Assessment/Work Plan process and explain expectations for next steps/coaching process</li> </ul>
February 16, 2023	3 <sup>rd</sup> Leadership Team Cohort Meeting (Consultants & Grantees) <ul style="list-style-type: none"> <li>3<sup>rd</sup> Leadership Team Cohort Meeting – learning session</li> <li>3<sup>rd</sup> Consultant Team Meeting</li> </ul>
March 2023	Capacity Investments to Grantees (up to \$15,000), once approved

***Phase Three: Capacity Improvement Period (March 2023 – February 2024)***

Date	Activity
March 1, 2023	Capacity improvement implementation begins, ongoing consultant support, project management oversight, and coaching throughout remainder of program.
June 22, 2023	4 <sup>th</sup> Leadership Team Cohort Meeting (Consultants & Grantees) <ul style="list-style-type: none"> <li>4<sup>th</sup> Leadership Team Cohort Meeting – learning session</li> <li>4<sup>th</sup> Consultant Team Meeting</li> </ul>
June 30, 2023	2 <sup>nd</sup> Consultant Payment (\$3,000)
September 28, 2023	5 <sup>th</sup> Leadership Team Cohort Meeting (Consultants & Grantees) <ul style="list-style-type: none"> <li>5<sup>th</sup> Leadership Team Cohort Meeting – learning session</li> <li>5<sup>th</sup> Consultant Team Meeting</li> </ul>
October 1, 2023	<ul style="list-style-type: none"> <li>3<sup>rd</sup> Consultant Payment (\$3,000)</li> </ul>
February 15, 2024	6 <sup>th</sup> Leadership Team Cohort Meeting CELEBRATION (Consultants & Grantees) <ul style="list-style-type: none"> <li>6<sup>th</sup> Leadership Team Cohort Meeting – learning session</li> <li>6<sup>th</sup> Consultant Team Meeting</li> </ul>
March 2024	Final Written Reflections Due (Consultants & Grantees)
April 2024	Final Consultant Payment (\$2,000)

**Submission**

Please submit interest and qualifications <https://nonprofitlifecycles.com/embracing-disruption-2-consultant-interest/>. Submissions must be received no later than 5:00 pm ET on May 31, 2022.

For further details about the Embracing Disruption program, please [click here](#).

Please direct any questions to Jennifer Bonnett at Nonprofit Lifecycles Institute at [jennifer@nonprofitlifecycles.com](mailto:jennifer@nonprofitlifecycles.com).