



## **Request for Qualifications**

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

***Submission Deadline: July 31, 2024***

## **Background**

The **Embracing Disruption** Cohort is a 15-month capacity building 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 5-6 organizations through a brief self-assessment, planning process and capacity implementation period. While similar to POWER and ADVANS, the Embracing Disruption Cohort program focus is building organizational resiliency in ever-changing environments.

The program design uses similar concepts from the ADVANS program developed under the direction of organizational consultant Dr. Susan Kenny Stevens that the Gifford Foundation initiated in 2007, which are tailored to perform with a different targeted group of organizations. As with ADVANS, POWER was designed to build the capacity of organizations through the lens of Dr. Susan Kenny Stevens' award-winning book, *Nonprofit Lifecycles: Stage Based Wisdom for Nonprofit Capacity*™. This “meet them where they are” approach is known as the Lifecycles approach to capacity building. To learn more about Embracing Disruption please visit <https://giffordfoundation.org/support/embracing-disruption/>. The Foundation launches the third round of this capacity building initiative with lead consultant, Jennifer Bonnett, MPA, President & CEO of the Nonprofit Lifecycles Institute.

**Embracing Disruption** will kick off in September 25, 2024. The cohort will participate in a 15-month capacity building initiative culminating in December 17, 2025, designed to strengthen the operating capacity of five to six 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 phase may continue to be impacted 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 may still require a moment of reflection to adjust, refine, and plan for the future.

The **Embracing Disruption** cohort program will support the organizations as they reflect on their current lifecycle stage 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.

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:

- 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 15-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 Organizations must be receptive to change

### **Role and Expectations of Consultants**

Each participating consultant must be able to make a 15-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: Stage Based Wisdom for Nonprofit Capacity™*. A copy of the *Nonprofit Lifecycles: Stage Based Wisdom for Nonprofit Capacity™* 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 or have completed the following professional development trainings:

- Half day Embracing Disruption Orientation September 25, 2024
- Successfully completed [Lifecycles 101](#) training before the first cohort meeting, last option is June 12 & 13, 2024

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 (Capacity Improvement Plan or CIP) to address these opportunities, which will serve as the basis for the capacity coaching and resources to be provided over the program term;
- Helping grantee's 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 (15-months));
- Communication with Lead Consultant, re: progress, concerns, ideas, etc.
- Upon completion of the program, consultants will complete a final consultant reflection of the work you have done as well as insights you have learned as part of your work in Embrace, an updated Lifecycles Placement and updated CIP.

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 2024);

- Ongoing Participant Coaching/Consultant and Leadership Team Meetings \$8,000, payable in three installments - April 2025 (\$3,000), October 2025 (\$3,000), January 2026 (\$2,000) - upon completion of deliverables

Consultants who have not previously completed a full day *Lifecycles 101* **must** complete the mandatory training on June 12 – 13, 2024 (2 half days, 12 – 3p ET). A limited number of registrations will be funded by the Gifford Foundation, contact Lindsay McClung for more details.

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.
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- 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.
  - Previous organizational consultants of the Embracing Disruption program may provide an update to their original RFQ submission if there are any changes you wish to note.

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 July 31, 2024 to schedule a teleconferenced interview prior to August 1, 2024, 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 August 31, 2024.

### **Embracing Disruption Timeline**

Participation in Embracing Disruption has the highest concentration of work occurring from September 2024 through December 2025.

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 2024 – September 2024)**

<b>Date</b>	<b>Activity</b>
June 12 – 13, 2024 <i>(2 half days, 12- 3p ET)</i>	Consultant Training for <a href="#">Lifecycles 101</a> * <i>*a limited number of registrations are funded by the Gifford Foundation, contact Lindsay McClung for details.</i>
July 31, 2024	Deadline for receipt of consultant qualifications
By August 1, 2024	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>
August 13, 2024 <i>(half day)</i>	Diversity, Equity, and Inclusion Training
August 31, 2024	Consultant Final Notification & Grantee Match
September 25, 2024 <i>11 -1:45p ET</i>	Embracing Disruption Consultant Orientation

#### **Phase Two: Self-Assessment/Work Plan Process (September 2024 – December 2025)**

<b>Date</b>	<b>Activity</b>
September 25, 2024 <i>2 - 4:30p ET</i>	1 <sup>st</sup> Leadership Team Orientation Meeting (Consultants & Grantees)
December 12, 2024 <i>Consultants 12 - 1:45p Org &amp; Consultants 2 - 4:30p</i>	2 <sup>nd</sup> Leadership Team Cohort Meetings <ul style="list-style-type: none"> <li>• 2<sup>nd</sup> <i>Consultant Team</i> meeting to debrief Assessment/Work Plan process and explain expectations for next steps/ coaching process</li> <li>• 2<sup>nd</sup> <i>Leadership Team</i> Cohort Meeting – learning session</li> </ul>
December 19, 2024	<b>Deliverable: Organizational Selfie</b> <b>Deliverable: Organizational Capacity Improvement Plan</b> Lead Consultant to review, quality assure, provide feedback and preliminary approval

December 31, 2024	1 <sup>st</sup> Consultant Payment \$5,000
March 12, 2025 <i>Consultants 12 - 1:45p</i> <i>Org &amp; Consultants 2 - 4:30p</i>	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>
by March 1, 2025	Capacity Investments to Grantees (up to \$15,000), once approved

**Phase Three: Capacity Improvement Period (March 2025 – January 2026)**

<b>Date</b>	<b>Activity</b>
March 1, 2025	Funded capacity improvement implementation begins, ongoing consultant support, project management oversight, and coaching throughout remainder of program.
April 30, 2025	2 <sup>nd</sup> Consultant Payment (\$3,000)
June 11, 2025 <i>Consultants 12 - 1:45p</i> <i>Org &amp; Consultants 2 - 4:30p</i>	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>
September 28, 2023 <i>Consultants 12 - 1:45p</i> <i>Org &amp; Consultants 2 - 4:30p</i>	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 31, 2025	<ul style="list-style-type: none"> <li>• 3<sup>rd</sup> Consultant Payment (\$3,000)</li> </ul>
December 17, 2025	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>
December 31, 2025	Final Written Reflections Due (Consultants & Grantees)
January 31, 2026	Final Consultant Payment (\$2,000)

**Submission**

Please submit interest and qualifications to <https://wkf.ms/49KGkHi>. Submissions must be received no later than 5:00 pm ET on July 31, 2025.

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