

NeighborWorks® America
Request for Proposals:
Executive Coaches for
NeighborWorks® Achieving Excellence in Community Development Program

PURPOSE OF THE RFP

The *NeighborWorks® Achieving Excellence in Community Development* program (“AE” or “Achieving Excellence”) is a signature executive development program of NeighborWorks® America’s training division. AE is a performance-driven organizational investment program and change strategy designed to help the affordable housing and community development field build capacity and to reposition organizations for the next 5-10 years by focusing on seasoned executive leaders. While most of these leaders are executive directors, approximately 20% are chief operating officers or other similar positions of senior leadership.

The purpose of this Request for Proposals is to solicit proposals from qualified professionals seeking to serve as executive coaches during the 18-month *NeighborWorks® Achieving Excellence in Community Development* program. The sixth Achieving Excellence class is scheduled to commence with meetings in summer 2012 and proceed through February or March of 2014.

BACKGROUND ON NEIGHBORWORKS® AMERICA AND THE NEIGHBORWORKS® SYSTEM

NeighborWorks America is a national nonprofit organization created by Congress in 1978 to provide financial support, technical assistance, and training for community-based revitalization efforts. NeighborWorks America is the country’s preeminent leader in affordable housing and community development. We work to create opportunities for lower-income people to live in affordable homes in safe, sustainable neighborhoods that are healthy places for families to grow. Headquartered in Washington, DC, NeighborWorks America operates through a national office, two regional offices and seven district offices. NeighborWorks America operates in three major realms:

NeighborWorks Network

NeighborWorks delivers many of its community-focused programs and services through the national NeighborWorks network – 235 independent, community-based nonprofit organizations serving more than 4,500 communities nationwide. More than one-third of these organizations serve rural communities. Together with its national and local partners, NeighborWorks provides grants, programmatic support, training and technical assistance to its national network.

National Partnerships

National partners, such as banks, insurance companies, retailers and foundations, play an important role in helping NeighborWorks America and NeighborWorks network organizations revitalize hundreds of communities.

Related Capital Corporations

NeighborWorks America works with several affiliated capital corporations to build partnerships, develop loan products and support financing vehicles that further expand affordable housing opportunities nationwide.

For more information about NeighborWorks® America, go to the website at www.nw.org.

BACKGROUND ON THE NEIGHBORWORKS® ACHIEVING EXCELLENCE IN COMMUNITY DEVELOPMENT PROGRAM

As noted, the *NeighborWorks® Achieving Excellence in Community Development* program is an 18-month organizational investment program. Participants are provided three cutting-edge academic sessions at Harvard University's Kennedy School of Government led by university faculty and others; guidance on performance-driven change; intensive one-on-one executive coaching; and peer group learning.

The program officially began in August 2002 with academic sessions delivered by the Hauser Center for Nonprofit Organizations at Harvard University's Kennedy School of Government. Four cohorts have now graduated the *Achieving Excellence* program and the fifth will conclude in March 2012.

Impact evaluations have shown that the *NeighborWorks® Achieving Excellence in Community Development* program is one of the most innovative and high-impact programs in the affordable housing and community development industry. Results of an independent firm's impact evaluation show that the graduates—already highly regarded in their field—attribute exceptional results to the program. Virtually all of the participants as well as over 90% of the organizations' staff and board members report *profound* positive impacts on their organizational coherence and innovation; outcomes focus and performance measurement; organizational capacity; and community results.

Key AE Program Components

There are four main components of AE:

1. The Performance Challenge
2. Academic sessions
3. Executive Coaching (the focus of this RFP)
4. Peer support

- 1. Performance Challenge**—The central focus of the program is the outcome-based organizational performance challenge that enables the leader and the organization to apply new skills and ideas to a significant issue in the organization. Because the organizational challenges selected tend to promote transformation of organizational performance and capability, this means that the personal leadership skills, vision and style of the executive typically are also challenged.
- 2. Academic sessions**—Three academic sessions of 4-5 days each are interspersed over the course of the 18-month program cycle and provide rigorous thinking and academic frameworks specifically appropriate to community development. The first academic session at the university is the official kick-off of the program and is designed to open the minds of the leaders and generate the energy to think about their organizations in a new way. The second and third academic sessions are hosted and facilitated by the university at approximately 6 months and 14 months into the program. Course content over the three sessions tends to include strategic analysis, theories of leadership, performance measurement, community building, negotiations, and organizational alignment. After each academic session, participants then proceed back to their own communities to put

the lessons into practice in achieving their performance challenges while receiving on-going coaching and peer support from others in their color group. The color groups also convene for two additional meetings outside of the university setting that are led by the executive coach. The formal program concludes approximately 18 months after the program's beginning with a forum held at the NeighborWorks® Training Institute tentatively scheduled for February/March 2014.

3. **Peer Exchange**—Each participant is part of a cohort group with 9-10 other colleagues—known as a Color Groups—coordinated and facilitated by a coach. Meetings with color group members help the executive leaders gain new skills and perspectives, garner support when they need it and learn from each other. The groups are important for executive leaders to understand that “I’m not the only one facing these problems”, and to offer peer-to-peer insights and accountability into overcoming specific issues.
4. **Executive Coaching**—Participants benefit from critical input from expert coaches. The coach helps guide each individual through performance-driven change and provides assistance in organizational development. Another key role for the coach is assisting and facilitating the peer group (“color group”) meetings and reviewing written assignments.

The executive coaching is described in greater detail below, as part of the “Scope of Services” section.

SCOPE OF SERVICES

The Role of the Coach

The coaches play several roles in Achieving Excellence. The key role for the coach is assisting each executive leader to define and implement his/her performance challenge. Skill components for this role include the following:

- understanding and application of performance-driven change;
- successfully facilitate a group of 10 senior leaders through dramatic changes in their organizational performance and their own leadership approaches;
- substantial experience as a coach and consultant in advancing organizational development in both for-profit and non-profit organizations;
- the ability to conduct coaching by telephone;
- willingness and ability to coach on areas that the coach may be just learning along with the participant (some of the concepts at the university session, aspects of the businesses the executive leaders are involved in, etc.);
- ability to help others think strategically;
- ability to successfully convey constructive feedback and direction;
- sincere and strong dedication to the success of the executive leader participants.

Like the individual coaching relationship, the group coaching relationship and facilitative role that the coaches play in the Color Groups must be based on trust and respect. The Color Group provides a way for the participants to converse, share their thoughts and observations, and provide feedback to each other as they develop and work through their performance challenges. This group relationship creates peer accountability and a safe haven to discuss sensitive issues. The Color Groups have often been described as a “safe place to be wrong and a supportive place

to be right”. The coach’s role is critical in the success of the Color Groups. In addition to the skills required for the one-on-one coaching relationship, the Color Group requires the following additional skills:

- facilitate a group effectively
- build effective relationships within and among the group participants
- effectively use assignments as tools of capacity building rather than to “make work”
- create a sense of “group” when there are only 5-6 face to face sessions over the 18 months.

In addition to the tasks related to the color group, each coach forms a team with the other four coaches and the Lead Coach, and all who work extensively with each other and with the NeighborWorks® America’s personnel—specifically the director of the program, Director of Leadership and Workforce Development Programs, Christina Deady. The purpose of the coaching team is to:

- provide a venue that enables each coach to share skills, perspectives and challenges with each other throughout the program
- to provide a channel for sharing experiences of individuals from one color group to another
- to provide input for modification to the program as needed

The goal of Achieving Excellence is both to position the community development organizations for improved performance for the next five years and to seed the community development field with a cadre of seasoned leaders who are focused on performance for the field as well as their individual organizations. Thus, this program requires coaches who care about the field of affordable housing and community development, even if they are unfamiliar with it, and are willing to go the “extra mile” to make the participants, their organizations, and the community development field successful.

Summary of Requirement and Qualifications

- experience with performance-driven change
- successful track record advancing organizational development in both for-profit and non-profit organizations
- substantial experience as both an executive coach (including work by telephone) and a consultant for a diverse group of clients and organizations
- experience using and coaching on SMART goals
- demonstrated success in management consulting (please highlight a particular area of expertise in management - specifically - strategic planning, communication, supervision and management of diverse staffs, and marketing).
- experience with facilitation and group management

TIMELINE AND TASKS FOR THE COACH

(months and items listed may vary depending on actual schedule of sessions at Harvard)

Overall, each Coach is expected to be available and present at all of the academic sessions, one-day meetings and available for regular calls with participants and the Lead Coach. While not yet confirmed, a tentative schedule for AE6 is included below for planning purposes:

- Module 1: Week of October 8, 2012
- “Chicago meetings”: At least one full day in early to mid-November 2012
- Module 2: Week of February 25, 2013

- One-day meeting during summer of 2013
- Module 3: Week of September 22, 2013
- February/March 2014: Concluding Forum and Graduation at NeighborWorks Training Institute

More specifically, a tentative overview of the timeline and tasks for each Coach includes the following:

June-August 2012: Coaches will meet for one day at Harvard University's Kennedy School of Government for one day. The purpose of that meeting is to finalize the Color Groups, review the first academic session (including the role of the coaches), discuss the 5-6 weeks after the academic session and establish the monthly coaching team conference calls.

Prior to this first meeting, the coaches should have read *Make Success Measurable* by Douglas K. Smith, reviewed the program evaluation studies and have carefully read the applications of the leaders assigned to their color group (approximately 10 applications).

August 2012: Begin reading the academic session materials and, if requested by NeighborWorks America staff, have a conference call with designated NeighborWorks® America personnel about the network organizations to gather general background on these leaders as well as those assigned to their Color Group. (Note: this will usually be 3-5 calls or fewer as less than 50% of the participants come from Network organizations.) As necessary, also have a call with the executive directors of the organizations that are sending a senior leader to the program to ensure that the executive director understands and is prepared for the changes that may result from the program, and that the ED will remain supportive of the senior leader throughout this process.

September/October 2012: Attend the first academic session at the university. Facilitate a ½ day session with the Color Group on defining their performance challenge. Facilitate discussions each morning for approximately 1 hour each day during the academic sessions, reviewing the lessons from the previous day and facilitating discussions around those and the performance challenges. Arrange for individual calls with each participant of assigned Color Group. Meet for 2-3 hours after the conclusion of the academic session with the coaching team.

October-November 2012: Prepare for and conduct a series of weekly/bi-weekly 1 hour coaching calls to each executive leader to refine the organizational challenge into a performance challenge. One to two “coaching team” conference calls (1-1½ hours each) each month. Prepare for one-day session at end of November or early December.

One Day session (November or December) Prepare for and facilitate a one-day meeting of the 9-10 members of the Color Group so that they may share and critique refinements of their challenges and turn them into performance challenges. This one-day workshop day also serves to set the expectations of the participants regarding coaching calls, “going public” with their challenges, benchmarks for the time leading up to the next academic session in February, and establishes group accountability.

November 2012 - February 2013: This time period involves preparing and conducting one-on-one coaching calls with the executive leaders (possibly 2 per executive leader per month) in the Color Group to move them forward with their challenge, help them define the “Early Wins” they will achieve by February, and help them with “Going Public” with their challenge. In addition, one call of approximately 1½ hours will be held each month with the coaching team including the

lead coach and NeighborWorks® America staff.

February 2013: Conduct a ½-day to full-day session with your Color Group where participants discuss the progress they are making, outcomes, and where they are stuck. This takes place the day the session begins at the university. Participate in all sessions during the week-long module at the university. The primary role of the coach for this is a meeting with the Color Group to discuss the cases or learning of the days. In addition, your Color Group or some other group configuration may meet one evening to discuss their challenges. This session would be facilitated by the coach. At the end of the university session, you may also have an additional ½-day meeting with a combination of the Coaching Team and/or the NeighborWorks® America Director of Leadership and Workforce Development Programs.

February-September 2013: Continue to conduct one-on-one calls with your Color Group. During this time, you may also be brought into calls to assist executive leaders who are outside of your Color group to help move them forward with their challenge. You will continue to have monthly Coaching Team calls for 1- 1 ½ hours.

You will also have one face-to-face session with your group during this period for one full day. You will develop the agenda and facilitate the discussion. Normally, this convening occurs in June or July at the office of one of the participants.

September/October 2013: The final session will be held at the university. Conduct a ½-day session with your Color Group where participants discuss the progress they are making, outcomes, and where they are stuck. This takes place the day the session begins at the university. Participate in the week of sessions at the university. The primary role of the coach for this is a one hour meeting each morning with the Color Group to discuss the cases or learning of the days. At the end of the academic session, you may have ½-day meeting with a combination of the Coaching Team and NeighborWorks America staff.

September 2013- February 2014: Conduct coaching calls with your Color Group as they move to expanding the challenge to other aspects of their operations. You will also participate in planning the one-day final forum that includes the graduation of the current class as well as a reunion of previous classes around the celebration of AE6's graduation and continued learning for all.

HOW TO SUBMIT A PROPOSAL

Proposals must be received by NeighborWorks® America **by or before 5:00pm Eastern, Friday, February 17, 2012.** Please submit your proposal via e-mail to **Christina Deady, Director of Leadership and Workforce Development Programs, at CDeady@nw.org.**

Proposals become the property of NeighborWorks® America and will be subject to disclosure as requested upon completion of the selection process. Proprietary information that you wish to remain confidential should not be included in your response materials.

The successful candidate will present evidence of both the ability and capacity to provide the services in the most effective manner possible, and will have a proven track record in providing the type of services we require. In order to be considered for the executive coaching component of Achieving Excellence, please provide the following:

1. Your resume and/or curriculum vitae
2. Description (of no more than 4-6 pages) of your qualifications as they relate to the “Scope of Services” listed previously. Please make specific reference to the “Requirements and Qualifications” and “The Role of the Coach” sections. The key here is to show how your experience and talent would contribute to the success of this program.
3. In addition to committing to your availability for the full program period (if selected), please also include a list of three references with e-mail and phone numbers.
4. Hotel, travel and sundry costs will be paid by NeighborWorks® America and should NOT be included in the bid.
5. Total cost for professional services for each proposal will be a factor used to make a final selection. Provide a proposal that encompasses all outlined in the Scope of Services and Timeline and Tasks for Coaches. Please be cognizant that NeighborWorks reserves the right to reduce the scope of services as necessary and correspondingly, the amount awarded for professional services. Of course, all applicants would be notified of any such changes in advance.

EVALUATION CRITERIA

Up to five coaches will be selected for this engagement. Each proposal submitted in response to this solicitation will be evaluated based on demonstrated success in employing the qualifications listed as well as on the total cost of the bid. Given that the executive leaders come from all over the country and work in diverse communities, the overall coaching team will be selected to reflect geographic diversity, racial diversity, and a variety of management expertise.

Key dates:

Deadline for submission of proposals	5pm Eastern, February 17, 2012
Review of Proposals	March 26 – May 7, 2012
Notification of selected contractors	On or before May 7, 2012

Qualified bidders will be alerted to schedule changes. The written proposal submitted will be the basis for contract negotiations. Bidders may be contacted for additional information.

NeighborWorks America reserves the right to interview candidates to obtain information complementary to that provided in the proposals. Input from interviews may be used to help make final selections. NeighborWorks America also retains the right to make this a multi-year, multi-program search process with a multi-program agreement or to create year-by-year agreements for the course of the program. NeighborWorks America reserves the right to adjust the scope of services as necessary, though any applicants/candidates would be notified of any such changes.

All inquiries and written submissions should be directed to:

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