

NeighborWorks® America
Request for Proposals:
Lead Coach for the
NeighborWorks® Achieving Excellence in Community Development
Program

PURPOSE OF THE RFP

The purpose of this Request for Proposals is to solicit proposals from qualified professionals seeking to serve as the lead coach providing guidance to a team of executive coaches for the 18-month *NeighborWorks Achieving Excellence in Community Development* program scheduled to commence with meetings in summer 2010 and proceed through February or March of 2012.

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 either second-in-commands, chief operating officers or similar positions.

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. Together, with national and local partners, NeighborWorks America creates new opportunities for residents while improving communities. NeighborWorks America operates in three major realms:

NeighborWorks Network

A national network of more than 230 community-based organizations in 50 states creating healthy communities through the work of thousands of residents, business people, government officials and other partners.

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

Neighborhood Housing Services of America is a national nonprofit secondary market that has provided innovative financial solutions for NeighborWorks members since 1974. Community Housing Capital provides interim development and permanent multifamily loans to NeighborWorks organizations. NeighborWorks Capital provides critical risk capital to

NeighborWorks members by financing pre-development costs, acquisition of land and buildings, construction, rehabilitation, and interim operating costs.

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 seminars at Harvard University's Kennedy School of Government led by university faculty and others; 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. Three cohorts have now graduated the *Achieving Excellence* program and the fourth will conclude in March 2010.

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 organization performance and capability, the personal leadership skills, vision and style of the executive typically are also challenged.
- 2. Academic sessions**—Three academic sessions of 3-5 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 2012.

3. **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. More details are provided below. **It is this team of coaches to whom the Lead Coach provides guidance throughout the duration of the program.**
4. **Peer Exchange**—Each participant is part of a cohort group with 8-10 other colleagues—known as a Color Groups—coordinated and facilitated by one of the coaches from the coaching team. 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.

The Lead Coach does not facilitate a color group as the Lead Coach is responsible for checking in with each color group and coach and providing guidance to each coach and intermittent counsel to the program participants as needed.

The role of the Lead Coach is described in greater detail below, as part of the “Scope of Services” section.

SCOPE OF SERVICES

The Role of the Lead Coach

The role of the Lead Coach is to provide guidance to the executive coaches and, by working with the NeighborWorks America Director of Leadership and Workforce Development Programs, Christina Deady (henceforth to be referred to as AE Program Director throughout this RFP), to ensure integration of the coaches’ work with the other components of the program. Duties for the Lead Coach include but are not limited to the following:

- Provide assistance in the review of participant applications and assigning participants to the appropriate color groups (May/June 2010)
- Co-facilitate a one-day session for the coaches at Harvard before the first academic session begins (summer 2010)
- Conduct teleconference discussions with the coaches to review their roles, the principles and approaches of performance-driven change and questions they may have about what lies ahead
- Attend all academic sessions at Harvard University
- Plan, structure and conduct effective calls of the coaching team

- Attend and participate in the so-called “Chicago meeting”—a one day meeting of each of the five color groups that takes place approximately 6-8 weeks after the first Harvard session in late fall or earlier winter of 2010 (usually, but not necessarily, in Chicago).
- Monitor progress of the program participants against the goals of the program and make adjustments as needed. Counsel AE Program Director, coaches and others about any participants who are at risk of “falling short”
- Work with individual coaches to determine how best to help and work with specific participants
- Monitor the progress and performance of the coaches and the coaching team
- Anticipate needed shifts in Harvard program and work with NeighborWorks America staff, Harvard staff and others to make those changes
- Identify overall patterns and “lessons learned”, including patterns of performance challenges with potential implications for the field – and make recommendations (written and/or verbal)
- Conduct one-on-one coaching with specific participants, as needed, to help them achieve performance-driven change to benefit their organizations
- Potentially design and/or deliver 1-2 sessions at Harvard during each of the academic sessions
- Review assignments and evaluations of AE participants and provide a brief written assessment
- Brief written assessment of the performance of the coaches and the coaching team
- Assist in the design and participate in the Achieving Excellence forum (tentatively scheduled to be held at the February NeighborWorks Training Institute in 2012)

Requirement and Qualifications

The Lead Coach is, essentially, a coach to the coaches and this relationship must be based on trust and respect. This relationship creates accountability as well as a place for the executive coaches to turn when facing their own difficult situations in their coaching relationships. The Lead Coach assists in each participant having a more effective relationship with his/her coach and ensuring that the different elements of the program are integrated seamlessly with the coaches’ work. In addition to the skills required for the role of overseeing the coaching team, the Lead Coach must also:

- Understand and apply the concepts of performance-driven change
- Have experience using and coaching on SMART goals
- Demonstrate substantial experience in advancing organizational development in both for-profit and non-profit organizations and an understanding of the differences between the two
- Be able to conduct coaching by telephone
- Be willing and able 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.)
- Be able to help others think strategically
- Have the ability to successfully convey constructive feedback and direction
- Have a sincere and strong dedication to the success of the executive leader participants
- Build an effective team atmosphere among the coaches
- Effectively design assignments that will serve as tools of capacity-building rather than “making work”
- Provide a channel for sharing experiences of individuals from one color group to another
- 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 a Lead Coach who cares about the field of affordable housing and community development, even if unfamiliar with it, and is willing to go the “extra mile” to make the coaches, the participants, their organizations, and the community development field successful.

TIMELINE AND TASKS FOR THE LEAD COACH **(months and items listed may vary based on actual session dates at Harvard)**

Overall the Lead Coach is expected to be available and present at all of the academic sessions, one-day meetings and available for regular calls with coaches and participants. While not yet confirmed, a tentative schedule for AE5 is included below for planning purposes:

- Module 1: Week of September 26, 2010
- “Chicago meetings”: At least one full day during week of November 10 or November 16, 2010
- Module 2: Week of February 28, 2011
- One-day meeting during summer of 2011
- Module 3: Probably week of September 26, 2011
- February/March 2012: Concluding Forum and Graduation at NeighborWorks Training Institute

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

May-August 2010

- Participate in discussions that will shape curriculum plans for Achieving Excellence 5
- Review applications of participants and provide recommendations for color group assignments
- Review and update “Coaches Guidebook” as necessary
- Co-facilitate and add input to the planning of a one-day session for the coaches at Harvard
- Conduct a teleconference discussion with the five "color group" coaches and NeighborWorks America Achieving Excellence staff to review the role of coaches, and questions they may have about what lies ahead

September/October 2010

- Plan, structure and conduct calls with NeighborWorks America AE Program Director and coaching team in preparation for fall session at Harvard and Chicago meetings in November/December.
- Prepare and deliver presentation for first session at Harvard
- Attend Harvard sessions
- Do check-ins with coaches and groups during color group meetings the first session at Harvard
- Conduct one-on-one discussions with coaches about particular participants and help coaches determine how best to help and work with those leaders
- Monitor the progress and performance of the coaches and the coaching team with the AE Program Director

November/December 2010

- Review approximately 50 draft Performance Challenges papers from participants and provide feedback to participants and coaches
- Plan, structure and conduct call with AE Program Director and coaching team on progress of 5 color groups
- Identify with AE Program Director and coaches common themes seen in the AE program
- Anticipate needed shifts in Harvard program and work with AE Program Director, Harvard and others to make those changes
- Identify overall patterns and “lessons learned”, including patterns of performance challenges with potential implications for the field – and make recommendations (written or verbal)
- Conduct one-on-one coaching with specific participants, as needed, to help them achieve performance.

January 2011

- Review approximately 50 "early win" plans from participants with AE Program Director and provide feedback to participants and coaches
- Plan, structure and conduct calls of coaching team with AE Program Director monitoring progress and providing input for session 2 at Harvard

February/March 2011

- Potentially design and deliver brief session during second Harvard academic program
- Attend Harvard sessions and advise groups and individuals as needed
- Support AE Program Director to deliver evening sessions that that will lead participants to engaging with other participants outside of their color group
- Plan, structure and conduct calls of coaching team with AE Program Director

April/May 2011

- Review S-curve plans from participants and provide feedback to coaches
- Plan, structure and conduct calls of coaching team with NeighborWorks America AE Program Director on progress of the Participants
- Notify NeighborWorks America, coaches and others about any Participants who are at risk of “falling short” and provide appropriate counsel.
- Conduct one-on-one discussions with coaches about particular participants and help coaches determine how best to help and work with their Participants

June 2011

- Co-deliver 5 color group meetings
- Conduct one-on-one discussions with coaches about particular Participants and help coaches figure out how best to help and work with their Participants

July/August 2011

- Plan, structure and conduct calls of coaching team with NeighborWorks America AE Program Director on progress of the Participants
- Conduct one-on-one discussions with coaches about particular participants and help coaches figure out how best to help and work with their Participants

September 2011

- Plan, structure and conduct calls of coaching team with NeighborWorks America AE Program Director in preparation for final session at Harvard

October 2011

- Attend the final Harvard session
- Coordinate final Harvard sessions with Harvard faculty
- Prepare and present one final session to AE participants, if necessary

November 2011

- Review final assignments and evaluations of AE participants and provide a brief written assessment
- Brief written assessment of the performance of the coaches and the coaching team
- Identify overall patterns and “lessons learned”, including patterns of performance challenges with potential implications for the field – and make recommendations (written and/or verbal)

January 2012

- Plan and conduct coaching call with NeighborWorks America AE Program Director and coaching team to review overall progress of groups, program assessments and plans for Achieving Excellence forum

February 2012

- Assist in the design and participate in the Achieving Excellence forum (tentatively scheduled to be held February 2012 at the NeighborWorks Training Institute)

HOW TO SUBMIT A PROPOSAL

Proposals must be received by NeighborWorks America **by or before 5:00 p.m. (Eastern), Friday, March 26, 2010**. 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 Achieving Excellence lead coach, 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 Lead 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 items outlined in the Scope of Services and Timeline and Tasks for the Lead Coach. Please be cognizant that NeighborWorks America reserves the right to reduce the scope of services by up to 25% and correspondingly, the amount awarded for professional services. This will be specified in a multi-year task order that will be negotiated with each person selected prior to the start of the program.

EVALUATION CRITERIA

Only one lead coach 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.

Key dates:

Deadline for submission of proposals	5pm EST, March 26, 2010
Review of Proposals	March 26 – May 27, 2010
Notification of selected contractor	On or before May 28, 2010

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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