

Center for Disaster Philanthropy

REQUEST FOR PROPOSAL

Organizational Climate Assessment and Change Management Plan

Proposals Due by: **January 23, 2023 by 4 PM CT**



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1. Organizational Background

The mission of the [Center for Disaster Philanthropy](#) (CDP or Organization) is to leverage the power of philanthropy to mobilize a full range of resources that strengthen the ability of communities to withstand disasters and recover equitably when they occur. With the increasing frequency and intensity of disasters comes the critical need for philanthropy to know when and how to respond effectively. CDP's innovative strategies advance donors' values, increase the impact of their contributions, meet the needs of vulnerable populations and ultimately, strengthen their communities.

CDP is guided by a [board of directors](#) and an [advisory council](#). We also partner with several organizations and work in concert with our clients, funders and grantee partners. We are a 100% dispersed office.

Growth over the most recent three years of CDP's 12 year-history has been exponential. CDP's positioning and greater visibility have sustained increased revenue and companion expense levels. This growth has led to increased pressures on staffing – in terms of numbers, levels and required skills – and a changing work pace and environment. While efforts have been made to keep pace, these have been primarily through an organic process.

With the launch of our new strategic plan in 2023 and the recent evaluative work conducted by The Corley Group and the Center for Effective Philanthropy, this is the opportune moment for CDP to reflect on our current climate and to develop and implement changes that will allow CDP and its people to thrive and grow.

2. Proposal Overview

The Center for Disaster Philanthropy's objectives for undertaking this exercise include, but are not limited to, the following:

- a. To advance the development of a [values-based](#) culture that is fully embedded in how staff think, act and deliver on our mission and strategic goals.
- b. To seek alignment between structure, staff, policies, procedures and skills against our new strategic plan.
- c. To foster a culture where staff are highly engaged, committed to learning and focused on our mission, allowing for an environment of strategic organizational growth.
- d. To embed a climate of belonging, team spirit, objectivity, individual and organizational recognition, commitment to excellence, compliance with industry best practices and open communication.

CDP expects that these four objectives, referred to hereafter as "desired culture" in this document, will be fully met through the engagement of an organizational development and design firm (Firm). Proposals are expected to be thorough, reflective of CDP's objectives and attentive to the details included in this RFP.

CDP anticipates these objectives will be achieved through a two-phase process, including an organizational culture and climate assessment and a follow-on iterative process tailored



to our organizational needs and one that we – as individuals and team members – help co-construct.

2.1 Phase One: Assessment and Recommendations

Organizational Culture and Climate Assessment

The organizational culture and climate assessment phase is meant to align the strategic objectives and values of the Organization with its culture and to ascertain if there are any structures, behaviors or practices that inhibit the Organization's success.

The Firm is expected to:

- Engage with the entire Organization to assess and understand the current organizational culture.
- Identify inhibitors and gaps between our strategic objectives, values and the existing culture and skills.
- Provide recommendations on desired changes and acknowledge successes.

The assessment should cover all dimensions of behavior believed to shape the organizational climate. We anticipate that these can potentially be uncovered using relevant instruments, tools and techniques that provide insight into leadership styles, staff engagement, values assessment, and work and management practices. At a minimum, this assessment should encompass the following:

- **Leadership:** leaders' role-modeling behaviors; their manner of communication, especially in reinforcing positive and desired behaviors; how they spend their time, manage their priorities and interact with direct reports.
- **People:** the kind of employees recruited and hired, including how recruitment occurs; opportunities for meaningful work and the career path and personal growth the organization enables; and how talent is on-boarded, promoted, retained and coached.
- **Performance Management:** key performance indicators the organization uses to define and track performance drivers; policies and practices regarding compensation, benefits, promotions, rewards and penalties, including the consequences of undesirable behavior.
- **Formal and Informal Interactions:** nature of peer-to-peer interactions, gatherings and events; organization-wide communication systems; interpersonal communications.
- **Organization Design:** structure, processes and roles; decision-making and collaborative processes.
- **Resources:** access to management systems, project tools and human resources.
- **Values:** people's understanding and attitude to the Organization's values.

Organizational Culture Development

CDP's current organizational culture will form the basis upon which the desired culture can be designed. The Firm will be expected to:

- Understand CDP's current culture and how it aligns with its 2023-2025 strategic objectives.



- Identify components of the optimal CDP culture to ensure that structures, behaviors and practices are aligned for maximum success.
- Identify gaps between the current and desired culture. Subsequently, recommend actions to close those gaps.
- Assist the Organization in developing a plan to implement the desired culture.

2.2 Phase Two: Change Management Plan Implementation

Culture Alignment/Transformation

CDP wants to ensure that the desired culture is aligned with the approved 2023-2025 strategic plan, with the right structure, plans and processes in place to support implementation. The Firm will assist the Organization through:

- Clear definition of the key aspects and new ways represented by the desired culture, and recommended priorities.
- Implementation of initiatives to embed the desired culture, or recommendations for same.
- Facilitation of staff engagement, including attentiveness to emotions and communication and learning styles.
- Facilitation of organizational change management.
- Develop mechanisms for reviewing the effectiveness of changes.

Measurement and Evaluation

The Firm shall provide data and appropriate metrics to measure, support and sustain the cultural transformation and related initiatives so all can understand how it impacts people and performance. If possible, an individual accountability framework should be developed.

3. Expected Project Deliverables

The expected tasks and deliverables include:

Phase One

- Preliminary Analysis and Assessment Report
- Desired Culture Transformation Road Map
- Presentation of Preliminary Report and Road Map

Phase Two

- Organizational Change Management Strategy
- Support for Implementation Components
- Final Report and Presentation

4. Proposal Submission Instructions

Please provide your responses according to the directions outlined in this section and in fulfillment of the items noted above. Proposals should be clear and comprehensive and offer a straightforward, concise description of the Firm's capability to meet the requirements of the RFP.



Response must be submitted by an authorized representative of the Firm.

4.1 Intent to Respond

Firms seeking to ask questions must notify CDP of their intention to respond with a proposal per the date in the timeline (see section 5). Notification should be made by email. Please send your intent to respond, including the primary contact's name, email and phone number, to Patricia McIlreavy, CEO, at RFP@disasterphilanthropy.org. The email's sender will receive an acknowledgement email once the intent to respond from your organization is received. Answers to all questions asked by January 10, 2023, will be shared with all firms that pre-indicate their intent to respond.

4.2 Approach and Methodology

The Firm is to clearly outline how they intend to conduct the assignment and fulfill the deliverables outlined in Section 3. They are expected to explain their understanding of the objectives outlined in Section 2, the approach to be adopted, and the methodology to be applied/followed to provide the expected outcomes.

4.3 Proposed Costing

We are requesting your best price for this project based on the information provided in this RFP. Please strive to make your pricing as understandable and transparent as possible. The clarity and predictability of your pricing will be evaluated, as well as the overall value provided by your offer. The Firm may provide a quote detailed by Phase or for the work in its entirety.

Pricing should be valid for 30 days from submission, and include the following information:

- 4.3a Number of staff and anticipated hours (on average per week or fixed rate)
- 4.3b Hourly rates for all staff
- 4.3c Detailed breakout of all administrative expenses

4.4 Work Plan and Duration

The work plan should be consistent with deliverables and provide as much detail as possible regarding the approach, timeframe and expectations of the Organization.

4.5 Firm Staffing & Skills

The proposed structure and composition of the team should be provided, along with relevant experience and education profiled. Highlight the Firm's collective skills and positioning that make your Firm especially well-suited for aiding CDP with this project.

4.6 Racial and Intersectional Equity

In alignment with our mission, the Center for Disaster Philanthropy board and staff are committed to racial and intersectional equity and guided by the values of integrity, boldness & innovation, humility and empathy. This commitment and our values reflect who we strive to be as individuals, how we do what we do in pursuit of our mission, and our aspirations to do better. Please provide a statement and/or your organization's policy, and whether you identify as a Minority or Women Business Enterprise in your RFP response.



4.7 Additional Information

The inclusion of a summary of information that CDP will need to provide to you over the course of the project should be provided to the extent possible.

Provide examples of any relevant experience working with philanthropic organizations that have a US domestic and international scope, as well as experience working with organizations with a fully remote staff.

If your Firm has any pre-existing connections with CDP and its staff, note them here, including how you intend to maintain objectivity.

Additionally, we welcome the submission of any supporting materials that will help CDP better understand your firm and the proposed scope of work. This may include items such as advisory services you may have on offer beyond the scope of this RFP.

4.8 References

Please provide three references that reflect work and experience similar in scope and requirements to this RFP, including with those with similar organizational profiles, and include the following information as part of your RFP response:

- 4.8a Name of the organization
- 4.8b Contact person(s) from the organization including email addresses and phone numbers
- 4.8c Name of the engagement and the year this engagement was completed (or active)
- 4.8d Additional information that may be applicable

4.9 Confidentiality

It is expected that the selected Consultant will maintain the highest standards of confidentiality regarding the information provided before, during and after the completion of assignment.

5. RFP Process

RFP Timeline

Following is the timeline that will guide the RFP process:

#	Action	Due Date	Action Owner
1	RFP issued	December 21, 2022	Organization
2	Last day to notify organization of intent to ask questions	January 6, 2023	Firm
3	Last day to submit RFP questions to organization	January 10, 2023	Firm



4	Organization provides written response to questions (to all organizations that have pre-indicated intent to respond)	January 13, 2023	Organization
5	Proposals and three references due from submitting firms	January 23, 2023	Firm
6	Organization completes interviews, if required	January 30 - February 3, 2023	Organization/Firm
7	Organization selects firm	February 8, 2023	Organization
8	Firm selection notification	February 10, 2023	Organization
9	Completion of assessment phase	TBD	Firm
10	Presentation of results and recommendations of assessment to organization	TBD	Firm

Questions and Clarifications

Questions regarding the RFP must be submitted via email to the address below per the timeline outlined above. The answers to these questions will be addressed in a written response that will be distributed to all Firms who indicated their intention to respond.

Provide all questions via email to RFP@disasterphilanthropy.org by 4pm (CDT) on January 10, 2023.

