



HEIFER PROJECT INTERNATIONAL
Request for Proposal
For
Organizational Design and Change Management
RFP #20241220

RFP Issue Date: October 19, 2023

Proposal Deadline: December 20, 2023

www.heifer.org

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1. INTRODUCTION AND CONTEXT

Heifer Project International (HPI) is a global non-profit working to end hunger and poverty in a sustainable way by supporting and investing alongside local farmers and their communities. Heifer was founded on the simple belief that ending hunger begins with giving people the means to feed themselves, generate income, and achieve sustainable livelihoods. Since 1944, Heifer International has worked with more than 46 million families around the world to end hunger and poverty in a sustainable way. Working with rural communities in 21 countries in Africa, Asia, and the Americas, including the United States, Heifer International supports farmers and local food producers to strengthen local economies and build secure livelihoods that provide a living income.

Heifer International has been operating with a Mission to work with communities to end hunger and poverty and care for the Earth. Using a combination of a values-based community development approach along with market systems development, Heifer works with communities to strengthen the local economy, diversify diets with better nutrition, and properly manage resources for future generations.

Heifer's 2030 Strategy Framework set forward the goal to support an additional 10M families to reach a sustainable living income by 2030 through a combination of Heifer's longstanding community development approach of building social capital and providing inputs of livestock, training, and other agricultural assets with newer approaches of engaging and strengthening inclusive, competitive market systems across Africa, Asia, the Americas, and the United States. To achieve this, Heifer International relies on its passionate, committed and highly skilled staff.

Heifer continues to evolve its strategy and programmatic approach to be a relevant actor in the sector and partner to communities of smallholder farmers. With the transition of new executive leadership in 2022, Heifer CEO Surita Sandosham and Heifer leadership teams confirmed the organization's commitment to an organizational transformation aimed at strengthening Heifer's ability reach its goal and to catalyze sustainable locally led development.

As part of this commitment, Heifer is currently reviewing its program model. As the program model is clarified, it will inform Heifer's business model and operating model. It is envisioned that an updated operating model is needed for the organization to best support its strategy and aims of sustainable locally led development.

We are excited to embark on this ambitious journey that will lead to a more impactful organization that truly enables smallholder farming families to forge their own development pathways.

To this end, Heifer seeks to partner with a consultant or consultancy firm that has broad experience within the INGO sector in strategic development, organization design, and organization transformation. The consultant or consultancy firm will review the organization's current state and aspirations, advise on appropriate operating models, and work with key stakeholder groups in the organization and the Board of Directors to design an operating model that supports Heifer's goal, strategy, and mission.

2. PROJECT OBJECTIVES

Heifer International seeks to partner with consultant or consultancy firm with expertise in organizational design and change management to support the organization re-design its operational model to support Heifer's mission, goal, and strategy. It is anticipated that this work will begin in January 2024 and complete in December 2025.

Heifer seeks to prioritize consultants or consultancy firms from the Global South.

3. SCOPE OF WORK

(Note: Heifer may agree to changes in the Scope of Work and expected deliverables based on input from the consultant(s)).

Under the guidance of the CEO, the Chief People Officer, and the Senior Director of Strategy and Transformation, in deep collaboration across Heifer's leadership ecosystem and an operating model working group, the Operating Model and Change Management Consultant will partner with Heifer to design and implement an updated operating model relevant to evolving internal and external contexts and in service of an expressed intent to be a sustainable locally led organization.

The process may follow the following phases:

Phase 1- Discovery

Duration- Two Months/44 days

Under the Discovery Phase, the Consultant will use different dialogic approaches such as focus groups, meetings with leadership groups, key informant interviews, along with review of material to understand and assess Heifer's current state, drivers of transformation and change, and future state aspirations.

This phase will include:

- Review Heifer's 2030 Strategy Framework, Signature Programs, strategic intent set forward in FY24-26 plans and ongoing organizational transformation work led by an updated Program Model, which will inform Heifer's business model and operating model.
- Develop an understanding of Heifer's organizational ethos and guiding principles implicit in Sustainable Locally Led Development and Heifer's 12 Cornerstones.
- Review and understand existing business model, financial statements, funding and financing streams, fund allocations, and financial planning model and assumptions for future years.
- Review and understand existing operating model, structure (including an understanding of the organization's global legal structure), functions, processes, systems, workflows,

communication channels, and culture. This may be accomplished through focused conversations with front line staff, teams, and members of Heifer's Leadership Council.

- Review and document approaches to decision making across the organization.
- Review and document existing initiatives across the organization that are evolving parts of the operating model across global regions and departments.
- Review documentation of known pain points and visit with departments/teams regarding efforts being undertaken to remedy those pain points along with other outputs of work from related initiatives across the organization, regions, and departments.
- Develop a perspective on organizational readiness for transformation and what practices might need to be strengthened or developed to support teams through change.
- May involve domestic travel to Little Rock Arkansas and international travel to Heifer country operations.

Anticipated Deliverables Expected from Phase One:

Upon satisfactory delivery of the above deliverables, the consultant will produce or prepare a presentation/discussion and documentation to appropriate Heifer leadership to include documented learnings from discovery phase, including perspective on organizational readiness and areas of early enquiry for definition.

Phase 2- Define

Duration- Three Months/ 66 days

Under this phase, the Consultant will define relevant stakeholders and the levels of engagement needed throughout the process while maintaining a perspective of sustainable locally led development. The consultant will work with stakeholders to craft a future operating model in line with the 2030 Strategy Framework, ongoing learning and adaptations, and developments in Heifer's program model and business mode. The consultant will:

- Develop, in collaboration with stakeholders, a set of grounding design parameters to define what the operating model must do to enable Heifer's Program Model and Business Model. Design parameters will guide decisions made about components of the operational model: key organizational challenges to address or strengths to preserve.
- Based on learning from discovery phase and in response to program model and developing business model, define the weaknesses and strengths of the current operating model and develop perspective on critical needs to consider and address.
- Identify and share relevant operating models used within the INGO sector or beyond and possibly invite external stakeholders to discuss their models.

- Consider external factors such as sectoral trends, market trends, technological advancements, and geo-political dynamics that are relevant to an operating model for the future.
- Based on learning from discovery phase and in line with strategic intent and aims of sustainable locally led development, engage stakeholder groups in participatory processes and decision to define accountabilities; roles; structure for optimal span of control; systems, including enterprise-wide systems; decision making processes; communication flows; and culture, which results in a redesigned operating model.
- Develop core, guiding principles by which to plan and to move forward on operations model.

Anticipated Deliverables Expected from Phase Two:

Upon satisfactory delivery of the above deliverables, the consultant will produce or prepare a presentation/discussion and documentation to appropriate Heifer leadership to include the following:

- Proposed re-designed operating model based on learning, stakeholder engagement and best practice and,
- Guiding principles co-created through engagement with stakeholders for operation model redesign and associated change management.

Phase 3 : Change Management Plan

Duration 2 months/44 days

During this phase, Consultant will engage key stakeholders to develop Change Management Plan that will include the following:

- Based on previous assessment of readiness and ongoing developments, develop an implementation plan and sequence of activity, including transition planning of phasing in/out of activities in service of new model
- Clarify measures of success and effectiveness
- Develop communication plans, feedback mechanisms, information sharing and collaboration.
- Develop plans to sustain staff engagement and ways of assessing engagement throughout transformation and changes in operating model.

Anticipated Deliverables Expected from Phase Three:

Upon satisfactory delivery of the above deliverables, the consultant will produce or prepare a presentation/discussion and documentation to appropriate Heifer leadership to include an implementation plan, including milestones and measures of success, communication and engagement plan, and perspective on practices and mechanisms for feedback.

Phase 4 : Implement, Learn, Adapt

Duration 6-12 months/132 – 264 days

During this phase, Consultant will engage key stakeholders and to support implementation, learning, and ongoing adaptations. Specifics of this phase will emerge upon completion of previous phases and may include:

- Support implementation of plan and sequence of planned change activity
- Support leadership groups in managing through change
- Gather learning, feedback, and adapt as necessary
- Evaluate effectiveness against success indicators

Anticipated Deliverables Expected from Phase Four:

Upon satisfactory delivery of the above deliverables, the consultant will produce or prepare a presentation/discussion and documentation to appropriate Heifer leadership to include the following:

- Monthly reporting to leadership group to include coaching and transition support; areas to pay attention; and emergent areas for adjustment and adaptations.

REQUIRED EXPERTISE

Proven, direct experience in leading and supporting organizational design and transformation in a large to mid-size global, culturally diverse organization.

Proven experience of working geographies where Heifer works (Central and South America; East, Southern and Western Africa; South and Southeast Asia; and United States.)

Offers range of people and competence, and the flexibility to engage across Heifer's ongoing development of strategy, program model, and business model while focusing on organizational design for operating model.

Experience in working within the development sector, e.g., INGO, development partners, etc.

Understanding and experience in emergent organizational structures (INGO and for profit) that are relevant to the external contexts within which Heifer delivers its mission impact and that optimize use of technology and access to information.

Experience in Change Management with a proven track of helping organizations deliver successful transformational change.

Professional fluency in Spanish oral and written language is preferred.

7. REPORTING AND COMMUNICATION

Reporting and routine communication will be determined and agreed by consultant and Heifer International's Senior Director of Strategy and Transformation in collaboration with Heifer's Chief People Officer.

8. EVALUATION CRITERIA

The success of the **Organization Design and Change Management Consultancy** will be evaluated based on the thoroughness of the analysis, clarity of recommendations, and the practicality of the proposed solutions by the Supplier.

Heifer seeks to prioritize consultants or consultancy firms from the Global South that meet requirements outlined in RFP.

Criteria	Percentage
Understanding of the RFP , Quality and extent of information provided by the proposal, Proposed approach, and methodology	20
Experience and Track Record : Individual or Company's experience in the Organization Design and Change Management Consultancy including the number of years in operation, references or case studies of previous projects completed, similar in scale and scope to your own project, testimonials, or recommendations from previous clients.	20
Technical Expertise : Approach to Organization Design and Change Management Consultancy design, installation, and maintenance and commitment to quality workmanship.	20
Client Support and Warranty : Warranty and after-sales support provided by the company on both equipment and workmanship. Responsiveness and availability for maintenance and repairs over the long term. Customer support processes and how they handle issues or emergencies.	15
Certifications and Licensing : The Supplier licenses to operate in Heifer's locations and compliance with all relevant regulations and standards. Certifications from recognized industry bodies.	15
Sustainability and Diversity Goals -Provide an overview of the supplier's diversity position, and sustainability goals and commitments.	5
Budget	5
Total Points	100

9. PROPOSAL FORMAT

The proposal should comprise technical and financial proposals. Proposals will be accepted preferably in soft copy through email with the subject line; “**Organization Design and Change Management Consultancy**” to RFP@HEIFER.ORG on or before December 20, 2023.

1. Cover Letter: A brief introduction and summary of your proposal.
2. Understanding of the Project: Your interpretation of our needs and objectives.
3. Methodology: Detailed description of your approach, timeline a, and project milestones or deliverables.
4. Team and Expertise: Profiles of key team members and their qualifications.
5. Past Experience: Case studies of similar projects and client references.
6. Budget and Cost Proposal: A detailed breakdown of cost and fees.
7. Evaluation Criteria: Explain how you propose to measure the success of the organizational design and change management project.

10 . RFP Response Structure Sample Forms

1. Proposal Details

Suppliers should provide their solution to the **Organization Design and Change Management Consultancy** RFP need and how they plan to address each product/service specification and requirement mentioned. The table below and aligned tables throughout are for example purposes but display the format in which we intend to receive supplier responses (*columns may be added/removed based upon alignment with the solution*).

Table 1. Product or Service List

Product/Service List
<i>[Example: Module A]</i>
<i>[Example: Module B]</i>

2. Financial Proposal and Timelines

Suppliers should provide a breakdown of costs associated with their proposal. Supplier’s fees and other costs, if any, must be submitted. For clarification, for a supplier’s financial proposal to be considered, it must include all costs the supplier wishes to have considered in the contractual arrangement with HPI.

Table 2. Financial Details

Line Item/Package Financial Breakdown	Metric	Quantity	List Cost	Discount	Proposed Cost
<i>[Example: Implementation Cost Module A]</i>					
<i>[Example: Implementation Cost Module B]</i>					
<i>[Example: Warranty Costs]</i>					
<i>[Example: Training Costs]</i>					
<i>[Example: Travel Expenses]</i>					
<i>[Example: Integration Costs]</i>					
<i>[Example: Module A]</i>					
<i>[Example: Module B]</i>					
<i>[Example: Module C]</i>					
<i>[Example: Enhanced Support]</i>					
<i>[Example: Add-on Cost]</i>					

Table 3. Proposed Timeline

Proposed Timeline	Month 1-3	Month 4-6	Month 7-10	Month 11-12	Month 13-16
<i>[Example: Implementation of Module A]</i>					
<i>[Example: Implementation of Module B]</i>					
<i>[Example: Implementation of Module B]</i>					

3. Value Added Services

Suppliers provide details of any Value Added or Bundles Services they will be providing.

4. References

Supplier to provide the complete information on three (3) customer references aligned with the **Organization Design and Change Management Consultancy** below:

Table 4. Reference Requirements

Reference 1	
Contact Name:	
Company:	
Title:	
Phone:	
Email:	
Include the length of time the reference has been a customer:	
Provide a description of the services/solution that has been provided:	

Table 5. Reference Requirements

Reference 2	
Contact Name:	
Company:	
Title:	
Phone:	
Email:	
Include the length of time the reference has been a customer:	
Provide a description of the services/solution that has been provided:	

Table 6. Reference Requirements

Reference 3	
Contact Name:	
Company:	
Title:	
Phone:	
Email:	
Include the length of time the reference has been a customer:	
Provide a description of the services/solution that has been provided:	

5. Additional Information for Consideration

- Supplier may include any additional information such as brochures, certificates, standards, and literature for consideration.

11. RFP TIMELINES

Deadline to submit supplier proposal: December 20, 2023

The following schedule of events will be followed to complete the selection of the successful supplier based on this RFP. HI reserves the right to change this schedule at any time. Suppliers must comply with all deadlines to meet HI's implementation schedules. Suppliers must submit all questions on this RFP by email to **RFP@HEIFER.ORG**.

Table 7. Tasks and Timelines

Tasks and Timelines	Date
RFP Release Date	October 19, 2023
Deadline for submitting supplier questions on content of RFP	November 1, 2023
Deadline for answers to all relevant questions	November 3, 2023
Deadline for submission of proposals	December 20, 2023

Tasks and Timelines	Date
Deadline for announcing list of shortlisted supplier(s) and supplier interview schedule (if required)	January 5, 2024
Deadline for completion of interviews from shortlisted suppliers	January 12, 2024
Deadline for RFP Outcome Notification	January 19, 2024

12. LATE SUBMISSIONS AND MODIFICATIONS

Proposals received after the submission deadline will not be considered. Applicants are responsible to ensure their proposals are submitted according to the instructions stated herein. Heifer retains the right to terminate this RFP or modify the requirements upon notification to the Applicants.

13. VALIDITY OF PROPOSALS

Proposals submitted shall remain open for acceptance for Twenty-One (21) days from the last date specified for receipt of the proposal. This includes, but is not limited to pricing, terms and conditions, service levels, and all other information. If your organization is selected, all information in this document and the negotiation process is contractually binding.

14. LIMITATIONS

This Request for Proposal does not represent a commitment to award a contract, to pay any costs incurred in the preparation of a response to this RFP, or to procure or to contract for services or supplies. Heifer reserves the right to fund any or none of the applications submitted and reserves the right to accept or reject in its entirety and absolute discretion any proposal received as a result of the RFP.

15. INTELLECTUAL PROPERTY

Section 1. Ownership Generally. Subject to Section 2 below, any intellectual property (including but not limited to copyrights, trademarks, service marks, and patents), intellectual property rights, deliverables, manuals, works, ideas, discoveries, inventions, products, writings, photographs, videos, drawings, lists, data, strategies, materials, processes, procedures, systems, programs, devices, operations, or information developed in whole or in part by or on behalf of Contractor or its employees or agents in connection with the Services and/or Goods (collectively, the "Work Product") shall be the exclusive property of HPI. Upon request, the Contractor shall sign all documents and take all actions necessary to confirm or perfect HPI's exclusive ownership of the Work Product.

Section 2. Prior-Owned Intellectual Property. Any intellectual property owned by a Party before the Effective Date ("Prior-Owned IP") shall remain that Party's sole and exclusive property. With regard to any of Contractor's Prior-Owned IP included in the Work Product, Contractor shall

retain ownership, and hereby grants HPI a permanent, non-exclusive, royalty free, worldwide, irrevocable right and license to use, copy, reproduce, publicly display, edit, revise, perform, and distribute said intellectual property, in any format or any medium, as part of the Work Product.

Section 3. Work Made for Hire. To the extent copyright laws apply to the Work Product, the Parties agree that (a) HPI specially ordered or commissioned the Work Product, (b) the Work Product is a "work made for hire" under United States copyright laws, and (c) HPI shall be deemed the author thereof and shall own all right, title, and interest therein. To the extent such rights, in whole or in part, do not vest in HPI as a "work made for hire", Contractor hereby irrevocably grants, assigns, and transfers to HPI, exclusively and in perpetuity, all of the Contractor's rights of any kind or nature, now known or hereafter devised, in, too, and in connection with the Work Product, and HPI shall solely and exclusively own any rights therein, and in the elements thereof, including but not limited to any allied, ancillary, subsidiary, incidental, and adaptation rights. The contractor hereby waives all rights known as "moral rights", and any similar rights, which Contractor may have in connection with the Work Product. The description of Services and/or Goods provided in this Agreement shall in no way limit the way HPI may use the Work Product.

16. APPLICABLE REGULATIONS

Supplier must be legally registered to operate and comply with local applicable legislation, including but not limited to labour law, financial requirements, taxes, etc.