Request for Qualifications (RFQ)
**Professional consultants to work as Executive Coaches,
Workshop Facilitators, and Data Coaches/Mentors**

Background

Nonprofit Knowledge Works, Inc. (d.b.a. "The Data Center") is seeking proposals to establish a roster of qualified consultants to work as executive coaches, data coaches, and/or assist in the delivery of course material for a pilot program designed to help local nonprofits build data capacity in their organizations. The Improving Measures & Practices through Action, Coaching, and Training (IMPACT) Fellowship, (hereafter referred to as "IMPACT Fellowship" or "The Fellowship") will be delivered over a 6-month period starting in January of 2020.

The purpose of The Fellowship is to build organizational capacity. The Data Center will engage in a collaborative process of assessment, action planning, training, and coaching to assist organizations in determining its needs and capacity to effectively use data to drive decisionmaking and maximize programmatic impact.

The Data Center accepted four organizations into the inaugural cohort of The Fellowship. One board member, one executive leader, and one program manager or data analyst from each of the participating organizations will participate in The Fellowship. The Fellowship plans to build each organization's capacity through classroom workshops and by mentoring individuals as they apply lessons learned during the fellowship to their organization.

Individuals participating in The Fellowship will receive coaching based on their position in the organization and attend classroom workshops focusing on the effective use of data. These workshops will provide opportunities for peer exchange, knowledge and skill development, and practical application of concepts.

Scope

The Data Center is looking for qualified consultants in one or more of the following areas:

- Executive Coaches
- Data Coaches
- Workshop Instructors or Workshop Facilitators

1515 Poydras St., Suite 1240, New Orleans, LA 70112

Consultants interested in working as workshop facilitators and course instructors will be asked to deliver content during individual class sessions which focus on data analysis, evaluation research, and process improvement. Consultants interested in working as coaches will be working one-on-one with an organization's executive leadership, board member, or data analyst as they implement new practices and conduct new analysis.

Workshops and coaching are provided in tandem for a more reciprocal application of concepts learned in workshops, and to help bridge the gap between theory and practice. For example, the coach can both reinforce and help participants apply concepts learned in workshops, as well as provide guidance on maximizing their time in the workshops by suggesting questions to ask, topics of focus, or pre-work activities.

Executive Coaches

Executive coaches work with one board member and one executive from each of the participating organizations to develop and implement strategies for using data to make decisions and improve performance. The executive coaches will work with leadership to establish goals and an action plan based on the organizations' need and skill level.

Executive coaches should:

- Have experience helping board members and C-level professionals develop competencies that improve their performance and allow them to make more informed decisions.
- Work with individuals of various skill levels to coordinate data use and develop strategies to use data to make decisions.
- Engage in bi-weekly (twice monthly) check-ins via phone, in-person meetings, or email status reports with board members and executives participating in The Fellowship.
- As requested, review and comment on drafts of materials produced by The Data Center for presentation.
- As requested, you will participate in other meetings related to the IMPACT Fellowship.

Individuals or organizations providing executive coaching should plan on being in New Orleans on dates mutually agreed upon with The Data Center. Please indicate an estimate of travel cost if you intend to include travel expenses separately in your proposed fee schedule.

Executive coaches will be assigned to work one-on-one with a board member and an executive leader from each participant organization. The time commitment for coaching board members

has been estimated to be between two to five hours per month for each organization with a maximum of four organizations participating. The time commitment for coaching an organization's executive leadership is estimated to be between two and five hours per month for each participating organization, with a maximum of four organizations participating. Additional administrative tasks such as scheduling meetings and status update calls may require additional time commitments.

Data Coaches

Data coaches provide ongoing assistance to organizations participating in The Fellowship to ensure they're able to apply concepts presented during workshops to their business practices, and assist organizations as they conduct analysis and use data to improve processes. A data coach may need to provide guidance on activities to be completed before a workshop, help with debrief or reinforce concepts after workshops, or assist organizations as they work through data collection and analysis.

Coaching sessions will take place at each organization's offices in New Orleans, and meetings should occur as needed to help the organization's data analyst meet their individual goals. Topics covered as part of a coaching session should align with topics covered as part of The Fellowship curriculum and allow for just-in-time learning. Frequency and duration of sessions will be based on the organization's needs. Data coaches should anticipate working directly with each fellowship participant for between five to ten hours per month, with a maximum of four participants for the duration of The Fellowship. A schedule will be determined by the coach, The Data Center staff, and the participating organization based on their need and goals. Keep in mind, scheduling meetings and status update calls may require additional time commitments.

Data Coaches should:
- Assist participant organizations by providing subject matter expertise related to data analysis, data collection, and process improvement.
- Engage in bi-weekly (twice monthly) check-ins via phone, in-person meetings, or email status reports.
- Assist organizations in identifying data sources and retrieving raw data files.
- Assist organizations as they assess their data, so they understand any limitations of their data.
- Assist organizations in developing data visualizations.
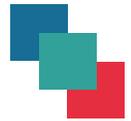
Workshop Instructors and Facilitators

Class sessions will meet one day each month for six months. Class sessions should include a combination of lectures and hands-on workshops. The structure and arrangement of class sessions may be determined by the trainer conducting the session. In addition to delivering course content, administrative tasks and curriculum customization may require additional time commitments.

Workshops will provide opportunities for peer exchange, knowledge and skill development, and practical application of concepts. Consultants interested in working as workshop facilitators and course instructors will be asked to deliver individual class sessions that focus on data analysis, evaluation research, and process improvement, among other skills.

Individuals or organizations interested in providing classroom instruction should plan to be in New Orleans to deliver course material. In your response, please indicate if you intend to include travel expenses in your proposed fee schedule by completing the appropriate sections in Attachment "A".

Form of Proposal

Interested organizations or individuals please provide the following:

- Brief letter of proposal indicating the consultant's interest;
    - o Respondents shall specify the category (or categories) in which they are proposing to provide services.
    - o Brief description of the individual or firm's qualifications and areas of expertise related to providing services in one of the three areas.
- Complete and submit Attachment "A" specifying remuneration schedule showing hourly rates for project team members and any other supplemental expenses typically incurred for the described services. Please refer to the table at the end of the document as an example of a fee schedule.
    - o Hourly rate for coaching member organizations.
    - o Rate or fee for administration if applicable.
    - o Hourly rate for delivering course content or a per course/workshop fee (honorarium) if applicable.
    - o Materials, software, and communications.
    - o Travel Costs (if applicable).
    - o Other additional costs if applicable.

- Please attach a Curriculum Vitae (CV) or resumes for the primary individuals delivering services.

Timeline

RFQ release date: August 22, 2019
RFQ responses due: September 13, 2019
Interviews (if needed): September 13 – 20
Fellowship delivery: January – June 2020

Selection

Staff of The Data Center will review consultant proposals and may conduct interviews with one or more respondents. All respondents will be notified of the selection as soon as possible after the submission deadline.

Contractor Status

In performing these services under this agreement, you shall operate as and have the status of an Independent Contractor and shall not act as an employee of Nonprofit Knowledge Works, Inc. (NKW). Although you may interact with vendors as part of your contract, you are not authorized to obligate NKW to any new or amended contracts. You are solely responsible for any and all payroll and taxes due on the compensation paid to you under this agreement. No benefits of any type are included in this agreement. All compensation and reimbursement will be reported by NKW to you and to the Internal Revenue Service on IRS Form 1099 for the year in which it is paid.

Contact Information

If you have any questions about the positions above, please contact Don Asay at donalda@datacenterresearch.org.

Attachment "A"
REMUNERATION SCHEDULE

Vendors shall state their proposed fee to The Data Center in the specified format(s) presented below, organized by service category. Vendors should submit pricing for only those service categories for which they are proposing services. Vendors that bid on multiple service categories are encouraged to fully describe their value proposition in terms of approach and methodology as discussed in Attachment "A". By submitting a fee proposal, Vendor acknowledges and agrees that its fee proposal in any one service category is not contingent upon Vendor being selected in any other service category.

Please identify the service category(ies) for which you wish to be qualified by completing the appropriate fee schedule for each category and checking the appropriate box(es) below indicating your intentions.

Categories Applied for:
- ❑ Executive Coaching
- ❑ Data Coaching
- ❑ Workshop Instructors or Facilitators

Executive Coaching

Only complete this section if you intend to be qualified for executive coaching.

Please provide your costs for providing executive level coaching, enabling organizations to develop and implement strategies for using data to make decisions and improve performance. Your proposed costs can take the form of an hourly rate, per organization, per individual, per session, a flat fee, or any other form of calculating costs as long as you specify how those costs should be calculated. Please use the table below to specify your cost proposal. You may enter a short note explaining your fee proposal, if necessary. See Attachment "B" for examples of how to complete the table.

Service	Rate	Units
Executive Coaching		
Notes:		

Data Coaching

Only complete this section if you intend to be qualified for data coaching.

Please provide your costs for providing data coaching, enabling organizations to apply concepts presented during workshops to their business practices and assisting as they conduct analysis and use data to improve processes. Your proposed costs can take the form of an hourly rate, per organization, per individual, per session, a flat fee, or any other form of calculating costs as long as you specify how those costs should be calculated. Please use the table below to specify your cost proposal. You may enter a short note explaining your fee proposal, if necessary. See Attachment "B" for examples of how to complete the table.

Service	Rate	Units
Data Coaching		
Notes:		

Workshop Instructors or Facilitators

Only complete this section if you intend to be qualified for developing and/or delivering training materials for IMPACT Fellowship classes and workshops.

Please provide your costs for providing course content creation and delivery for workshops providing opportunities for; peer exchange; knowledge and skill development; and practical application of concepts relevant to data analysis, evaluation research, and process improvement, among other skills. Your proposed costs can take the form of an hourly rate, per session, a flat fee, or any other form of calculating costs as long as you specify how those costs should be calculated. Please use the table below to specify your cost proposal. You may enter a short note explaining your fee proposal, if necessary. See Attachment "B" for examples of how to complete the table.

Service	Rate	Units
Curriculum Development		
Course Delivery		
Notes:		

General Administrative Fees

Only complete this section if you intend to propose costs that are not already included in other service categories, such as travel expenses or hours spent in preparation of providing a service.

Please provide any costs associated with activities supporting your engagement with fellowship participants. This might include time spent preparing meeting agendas for coaching, attending coordinating meetings, or travel expenses. Your proposed costs can take the form of an hourly rate, per organization, per individual, per session, a flat fee, or any other form of calculating costs that might be applicable as long as you specify how those costs should be calculated. Please use the table below to specify your cost proposal. You may enter a short note explaining your fee proposal, if necessary. See Attachment "B" for examples of how to complete the table.

Service	Rate	Units
Session Preparation		
Coordination Meetings		
Travel		
Other		
Notes:		

Items	Cost
Materials, Software, and Communications	
Notes:	

Attachment "B"
REMUNERATION SCHEDULE EXAMPLES

Executive Coaching

Example of executive coaching proposed at an hourly rate:

Service	Rate	Units
Executive Coaching	$60	Hour

Example of executive coaching proposed as a flat fee:

Service	Rate	Units
Executive Coaching	$5,000	Fixed Fee

Data Coaching

Example of data coaching proposed as a per organization fee:

Service	Rate	Units
Data Coaching	$2,000	Organization

Example of data coaching proposed as a per session fee:

Service	Rate	Units
Data Coaching	$300	Session

Workshop Instructors or Facilitators

Example of curriculum development proposed per module and workshop delivery proposed as a per session fee:

Service	Rate	Units
Curriculum Development	$300	Module
Course Delivery	$150	Session

Example of curriculum development proposed as a flat fee and workshop delivery proposed at an hourly rate:

Service	Rate	Units
Curriculum Development	$1,000	Fixed Fee
Course Delivery	$50	Hour

General Administrative Fees

Example of session prep fees at an hourly rate, travel costs per visit, and material costs:

Service	Rate	Units
Session Preparation	$30	Hour
Travel (inclusive of flight costs and room and board)	$2000	Visit

Items	Cost
Materials, Software, and Communications	$100

Example of session prep fees at an hourly rate and travel costs per visit, and material costs:

Service	Rate	Units
Session Preparation	$30	Hour
Travel (flight costs)	$1000	Trip
Travel (room and board)	$200	Day

Items	Cost
Materials, Software, and Communications	$100