

REQUEST FOR PROPOSAL (RFP)



Consultant Services:
Mission-Based Leadership
Cover Sheet and Instructions

Purpose

The **California Community Action Partnership Association** (CalCAPA) is seeking the services of consultants to provide training services for the Mission-Based Leadership program. The program is primarily focused on building leadership skills for new Executive Directors (or equivalents) in organizations that accept funds from the federal **Community Services Block Grant** (CSBG). Participants from the CSBG network may receive scholarships to mitigate or eliminate the cost of training for their organizations. However, in addition, the program will be offered to aspiring Executive Directors, community action contractor leadership, and non-CSBG related nonprofit leaders. The topics for training have been specifically identified by CalCAPA to address key development challenges for executive directors and those in similar organizational leadership roles. This RFP is restricted to the established topics. Additional leadership concepts may be included in the future or offered in the **CalCAPA Academy Marketplace**.

Please select one or more topics for which you are submitting this RFP.

- Working with a Board of Directors
- ROMA for Organization Leaders
- CSBG-specific Fiscal Training
- Executive Succession Planning
- Hiring Staff & Delegating Responsibilities

Respondent Contact Information

Business Name (or name of Sole Proprietor)		Tax ID (EIN or SSN)	
Primary Email	Mobile Phone	Other Phone	
Mailing Street Address			
City	State	Zip Code	

Scope of Work (SOW)

The nature of the work shall consist of collaborative development of training, delivery of training, logistics, and reporting.

1. Prepare a training workshop that addresses the topic according to the description found in the **Training Topics** section of this RFP and review with CalCAPA and CSD to review the proposed training strategy.
2. Present/Facilitate a half or full-day training/session (depending upon the defined training topic) on the agreed upon day, time, and location.
3. Submit attendance rosters and follow-up reporting for the session.

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Training Topics

<u>Leadership Concept</u>	<u>Duration</u>	<u>Description</u>
Working with a Board of Directors	1/2 Day	CSBG organizational standards define the Executive Director as the board's sole employee. A mission-based leader needs to know their role and how to most effectively manage the relationship with their board members.
Fiscal Training (CSBG-specific)	1/2 to Full Day	Mission-based leaders need a grasp of how nonprofit fund accounting works, how to navigate grant funding requirements, and how to create and maintain budgets. Activities should use CSBG requirements as the example.
Hiring Staff & Delegating Responsibilities	1/2 to Full Day	Identify when to recruit volunteers, hire staff, or contract with consultants for programs. Learn to navigate laws about hiring versus contracting. Detect strengths in all workers that support programs and align them with tasks. Select tasks to delegate and assign them to the correct people. Prepare all staff for career growth as part of organizational culture.
ROMA for Organization Leaders	Full Day	Introduce organization leaders to Results-Oriented Management and Accountability (ROMA). Teach all elements of the ROMA Logic Model, the ROMA Cycle, and relate the concepts to leading an organization. This should be more practical than Intro to ROMA .
Executive Succession Planning	1/2 Day	CSBG organizational standards define parameters for Executive Director succession planning. Identify how all key leadership positions can be sustainably filled through early recruitment, high-potential preparation, and contingency planning.

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How to Respond

For consideration, email your Proposal(s) to training@calcapa.org by **5:00 PM PST, November 15, 2019**.

If you are interested in responding, please submit your proposal(s) with the following:

- ❖ This coversheet
- ❖ Qualifications and resume
- ❖ Description of (each) training approach, curriculum and strategy - will vary depending on training topic
- ❖ Samples of materials used during training sessions (assessments, reports, handouts, etc.)
- ❖ Three (3) References/Letters of Recommendation (omit if already submitted with an RFP from 2019-2022)
- ❖ A standardized rate for travel and accommodations to any agency in the state

Evaluation Criteria

In evaluating quotations, CalCAPA will take into consideration following factors:

- ❖ Experience successfully completing similar and/or previous projects
- ❖ Experience and capability of the principal respondent
- ❖ The proposal's relevance to the scope of work and competitiveness
- ❖ Priority points will be given to consultants in California

Notification

The consultants whose quotations are accepted will be notified by **November 22, 2019**.

General Considerations

Efforts will be made by CalCAPA to utilize small businesses, women and/or minority owned businesses. A respondent qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 C.F.R. § 121.201).

Payment

Payment to the consultant(s) will be made as follows: Upon fulfillment of deliverables, CalCAPA will pay within 30 days of receipt of acceptable invoices.

Questions

For questions about this RFP you may contact Lawrence Hiner, Training Coordinator at CalCAPA **(916) 443-1721 ext. 203** or training@calcapa.org.