Please Note: Due to the global coronavirus (COVID-19) pandemic, certain elements of this project may need to be adjusted at a later date to accommodate for the uncertain future. The Training Fund is committed to working closely and flexibly with potential contractors, and asks that any respondents to this RFP bear in mind that a final scope of work may require adjustment and negotiation in order to address as-yet-unforeseen post-pandemic realities.

REQUEST FOR PROPOSALS
“Organizational Change Management: Transforming Today to Thrive Tomorrow”

BACKGROUND:

The District 1199C Training & Upgrading Fund (“the Training Fund”) is a 46-year-old, Philadelphia-based labor-management education and training partnership. The Training Fund is a resource for more than 50 regional healthcare and human services worksites represented in our labor affiliate, District 1199C of the National Union of Hospital & Health Care Employees; as well as for more than 5,000 low-and moderate-income residents of the Greater Philadelphia region each year. The Training Fund has developed a national reputation for excellence and innovation in the field of workforce development under the leadership of our three Executive Directors, Thomas Breslin (1974-1978), Jim Ryan (1978-2002) and Cheryl Feldman (2002-present).

Over our 45-year history, we have grown from a card table in the union hall basement to a nationally recognized non-profit with a multimillion-dollar operating budget, 50+ fulltime staff, serving thousands of participants a year and partnering across sectors to work towards larger systems change. The continuous programmatic expansion with little internal facing resources over the years, has led to our agency being organized more to address immediate functional needs of individual programs rather than long term strategic vision of the entire agency.

The Training Fund’s community programs include basic adult literacy, college and high school equivalency preparation, ESL courses, high school career exposure/training programs, academic bridge classes, and occupational training programs in six healthcare and human services career pathways- allied health, behavioral health, community health, health information, nursing, and Early Childhood Education.

While the current generation of our agency’s leadership prepares to think about the future of the organization, we recognize that succession planning must incorporate intentional changes to prepare for it. In 2020, thanks to a generous non-profit capacity building grant awarded to the Training Fund by the Philadelphia Foundation, we are able to solicit the services and recommendations of an
experts to facilitate leadership coaching and organizational change in the midst of our countless programmatic commitments.

Our staff-led Transformation Committee, who authored this document, will work with an outside consultant solicited through this Request for Proposals to develop a supportive staffing structure and organizational design that will position the Training Fund for a thriving future—meeting the needs of its Philadelphia members and communities. This work will involve incorporating relevant HR policies, defining shared practices that nurture a safe and trauma-informed environment for students and staff, and a talent pipeline that reflects, includes and celebrates the diversity of our organization’s student/staff community. We anticipate and understand that this transition and restructuring process will be complex, but also recognize that it is necessary to help us reach a better and stronger position as an agency that not only values but embodies diversity, equity, inclusion and opportunity for all as we move forward.

**PROJECT DESCRIPTION and SCOPE OF WORK:** This request for proposals (RFP) solicits a dynamic consultant or consultancy firm, experienced working with complex non-profit agencies, facilitating significant organizational change and designing HR plans and practices to move our agency redesign forward over the course of 8-10 months.

Consultant activities under the awarded contract are expected to facilitate an organizational change process that will include:

- Reviewing previous agency reports, research and relevant data
- Guiding and designing policies, procedures, job descriptions, agency protocol, hiring practices
- Advising organizational staffing/restructuring
- Setting realistic benchmarks for change staff and leadership
- Identify and facilitate trainings and professional development for staff and agency leadership grounded in race/equity/inclusion, trauma informed practices, and others that foster healthy workplace culture
- Wage comparability study
- Initiate and Lead human resources programs and projects
- Provide recommendations on resolution of day to day issues with flow
- Formulate strategic and practical plans to address human resource matters
- Guide leadership teams in development of onboarding and hiring process
- Devise plans and techniques to drive change and cultural management

**Budget & Timetable:** Consultants should prepare a budget in the range of $15,000-20,000 to complete this project by December 2020 (*please note: completion date subject to change based on the ongoing global coronavirus pandemic*).

**SUBMISSION INSTRUCTIONS and APPLICATION DEADLINE:** A letter of intent to apply is requested, but not required. Letters of intent should be received by no later than 5:00 PM (Eastern) on Monday, May 12<sup>th</sup>, 2020. The deadline for full applications is 11:59 PM (Eastern) on Sunday, May 25<sup>th</sup>, 2020.

All proposals submitted in response to this RFP will be reviewed by Training Fund staff. Proposals should be in either Microsoft Word or PDF format, with an overall length of no more than 8 pages (excluding attachments). Letter of intent and proposal submissions should be sent to Valda Xavier at vxavier@1199ctraining.org and Dylan Coleburn at dcoleburn@1199ctraining.org.
Depending on the volume of responses received, a preliminary round of interviews may be conducted among “finalist” applicants; successful applicants should expect to complete at least one interview before the contract is finalized, as well as a presentation to the transformation committee (please note: presentation may be delivered virtually, depending on the progress of the ongoing global coronavirus pandemic).

Proposals should include:

• A cover page which details:
  - Applicant name(s)
  - Primary contact name and title
  - Primary contact phone and email address
  - Website (if applicable)

• Project narrative responding to this RFP’s “Project Description/Scope of Work” section, including a detailed timeline and list of suggested deliverables

• Applicant description, and documentation of experience/capacity, responding to “Qualified Applicants/Selection Criteria” section and including contact information for at least two references, per “References” section

• Proposed project budget (may be submitted as spreadsheet attachment)

Applicants should also attach résumés/vitae for key personnel, and at least one example of a written, visual or other relevant product/work sample recently developed as part of a similar project.

If you have any questions, please contact Dylan Coleburn at dcoleburn@1199ctraining.org. Questions may be submitted up to 5:00 PM (EST) on Monday, May 4th, 2020. Questions and answers will be posted to the Training Fund’s website, www.1199ctraining.org/RFPs by Friday, May 8th, 2020.

QUALIFIED APPLICANTS and SELECTION CRITERIA: Eligible applicants should:

• Be able to document successful completion of similar projects, including providing two references (see “References” section).

• Have a minimum of 5+ years in non-profit leadership, organizational change management, or other relevant and directly applicable field.

• Have excellent communication skills

• Have some experience with the following:
  o Facilitating engaging professional development/staff trainings
  o Human Resources in complex non-profit agencies
  o Designing policies and practices to support organizational change
  o Demonstrated conflict/resolution management
  o Knowledge of workforce programs
  o Leading discussions and group sessions on issues of Race, Equity and Inclusion
  o Developing and implementing a plan to strengthening organizational culture
  o Developing infrastructure for organizations with limited funding

• Live in or close to the Philadelphia region (recommended/preferred). The hired consultant will be responsible for their own travel costs to and from our office in downtown Philadelphia.
REFERENCES: Please provide contact information for two recent clients and/or partners for whom you have recently completed similar projects. Please provide:

- Client name/organization, and contact information (phone and/or email)
- Dates of service, and brief (1-5 sentence) description of services provided

Proposal Submission / Applicant Selection Timeline:

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/29/20</td>
<td>RFP released</td>
</tr>
<tr>
<td>05/05/20</td>
<td>Deadline for submitting questions</td>
</tr>
<tr>
<td>05/08/20</td>
<td>Answers to submitted questions posted</td>
</tr>
<tr>
<td>05/12/20</td>
<td>Letters of Intent due</td>
</tr>
<tr>
<td>05/25/20</td>
<td>All Proposals Due</td>
</tr>
<tr>
<td>05/26-06/11/20</td>
<td>Proposal review period, candidate interviews, and selection process</td>
</tr>
<tr>
<td>06/15/20</td>
<td>Notification date</td>
</tr>
<tr>
<td>07/01/20</td>
<td>Finalize contract/project start date (approx.)</td>
</tr>
<tr>
<td>12/18/20</td>
<td>Project end date (est.)</td>
</tr>
</tbody>
</table>

(Please note: all dates highlighted in yellow are subject to change based on the status of the currently-ongoing global coronavirus pandemic)

OWNERSHIP OF MATERIALS: Unless otherwise specified, all Intellectual Property and other original materials developed, produced, conceived or authored by the contractor (and contractor's agents or subcontractors) pursuant to this RFP, and any and all modifications, whether in finished or incomplete form, shall belong exclusively to the District 1199C Training & Upgrading Fund at all times. The parties intend that all Materials be considered as work-for-hire under applicable law.

The term “Intellectual Property” means any and all intellectual property, including all rights in and to all ideas, designs, concepts, techniques, inventions, software, documentation, discoveries, reports, designs, specifications, works of authorship, data technologies, processes, methodologies, data or improvements, and print and audio-visual materials, such as design, photographs, layouts, artwork, whether or not patentable or copyrighted.