

Health Net of West Michigan is seeking consultation for two opportunities described in this Request for Proposals. A contractor or consulting practice with expertise in both areas may submit one proposal that addresses both RFP's.

RFP 1: Nonprofit Executive Leadership Assessment & Succession Planning Consulting

RFP 2: Nonprofit Finance Strategy & Systems Consulting

Proposal Due Date: July 19, 2024

Organization Overview: Health Net of West Michigan is a non-profit organization located in Grand Rapids, Michigan. Our work is centered on our vision of our community achieving health equity, where everyone has a fair and just opportunity to be as healthy as possible. Our role in improving the health and well-being of our community members is increasing access to, and effective use of, community services and informal support networks through navigation assistance. At a systems level, we work from an equity perspective that challenges community and systemic barriers that prevent people from reaching their health goals and their own optimal health.

Healthcare and social services navigation assistance is a specific scope of work performed by frontline staff such as community health workers and social workers. We provide navigation services to over 6,000 individuals and families annually, helping them to connect to housing, food, transportation, healthcare, and other social drivers of health. Funding comes from a blend of local, state and federal public funds, braided with grants from philanthropy and earned revenue.

Current Barriers to Success: To accomplish our organizational mission and strategic priorities, it is imperative to have a well-composed leadership team with the full array of skills and expertise needed to operate and sustain an organization that has experienced tremendous growth in its inaugural decade. Now with over 45 employees and dozens of contracts and revenue streams, Health Net is outgrowing its financial management processes. As the founding CEO helps position the organization for its next generation of leadership, this is the right time to focus on internal capacity-building for the future. Health Net is prioritizing both the development of a leadership succession plan and increasing capacity and systems for strategic financial forecasting by the end of 2025. These items are intertwined because Health Net intends to add capacity to the leadership team that not only replaces the CEO upon departure but adds the strategic financial expertise that is currently missing from the team.

RFP 1: Nonprofit Executive Leadership Assessment & Succession Planning

RFP 1 Overview: Consultant will engage Health Net in an assessment of its current leadership structure, skillsets and expertise of leadership team members and identify a leadership structure for the future that will include all vital leadership skills and experience needed to sustain the organization in the next phase of its life cycle, including both strategic vision and financially sustainable business operations.

RFP 1 Goals:

- **Assess** the current expertise, skillsets, and gaps and analyze what is needed for a successful leadership structure in the future.
- **Document a plan** for executive leadership transition and/or search activities.
- **Deliverables** include:
 - A written report on current leadership skillsets, expertise, strengths, roles, functions, and gaps of the leadership team
 - Documentation detailing the future leadership structure
 - Written job descriptions for each role in the future leadership structure
 - A written succession plan for the CEO role

RFP 1 Scope of Work: The Consultant will work with the Health Net Leadership Team and Board members for an estimated 15-month period to meet the project goals, bringing nonprofit executive leadership experience and expertise to guide and advise the process, as well as perform project activities such as skills and gap assessment, nonprofit leadership structure research and guidance, drafting reports, and documenting a succession plan. Consultant must have experience with emerging organizational leadership models (e.g., shared, distributed, or co-leadership) and creative approaches to nonprofit structure and decision-making (e.g., Advice model). Consultant will work collaboratively with the Consultant selected to complete RFP 2 to ensure overall alignment for the organization.

RFP 2: Nonprofit Finance Strategy & Systems Consulting

RFP 2 Overview: Consultant will engage Health Net in an assessment of its current financial structure, systems, and operations to clarify needs and propose solutions for sustainable financial operations.

RFP 2 Goals:

- **Assess** and document the current financial structure, systems, expertise, skillsets, and gaps and analyze what is needed for successful financial strategy and operations that align with Health Net's future strategic direction.
- **Document a plan** to increase capacity to engage in strategic financial forecasting and efficient and cost-effective financial management.

RFP 2 Scope of Work: The Consultant will work with the Health Net Leadership Team and Board members for an estimated 9-month period to meet the project goals, bringing nonprofit finance experience and expertise to guide and advise the process and suggest solutions, as well as perform project activities such as strengths and gap assessment and documenting a plan that addresses the organizational needs for the future. Consultant will work collaboratively with the Consultant selected to complete RFP 1 to ensure overall alignment for the organization.

RFP 1 & 2 Evaluation Metrics and Criteria: The successful consulting candidates will:

- Articulate a plan and process to meet the project goals
- Have prior experience consulting on this type of project
- Demonstrate success with similar plans that you led or consulted on
- Express an understanding and commitment to health and racial equity
- Provide clear costs for your services
- Participate in an interview process with Health Net

Proposal Submission Requirements:

Submit proposals to the Project Contact listed below via email by 5:00 pm EST on the Proposal Due Date, **July 19, 2024**. Proposal submissions must include:

- Description of your company, names/titles/resumes, or CVs of those who will consult on this project
- Narrative outlining your strengths and distinguishing skills or capabilities that relate to this project
- Any barriers you anticipate with this project
- A sample or description of similar project deliverables for a previous client
- Anticipated costs with budget estimates
- Anticipated timeline for this project
- 2-3 references



Project Contact: Christina Pavlak cpavlak@healthnetwm.org (616) 742-8902

Health Net of West Michigan recognizes the value of diversity in our community and is, therefore, committed to actively developing supplier/vendor diversity by supporting locally owned and operated businesses, minority owned businesses, and women owned business enterprises.