



REQUEST FOR PROPOSAL (RFP)
Financial Transformation Modeling & Strategy Partner
Amendment

RFP Release Date	March 10, 2026
RFP Submission Deadline:	April 1, 2026 May 1, 2026
Questions/Inquiry Submission Deadline:	March 19, 2026 – April 23, 2026
Electronic submission to the Point of Contact:	Miranda Hora
Electronic submission:	RFP@HEIFER.ORG
Performance Period:	4 months after Agreement Signing

1. Project Background

Heifer International is undergoing a strategic transformation to become an agile, adaptive, locally led, and globally connected organization. The Transformation, Strategy & Communications (TSC) team is responsible for stewarding this work, providing the connective tissue that aligns the organization across its operations. As we transition from the Strategy Design phase to the Operational Activation phase, we have identified a critical need to evolve our financial management approach for transformation efforts. This evolution will enable us to develop a forward-looking resourcing picture that helps the organization make intentional, strategic decisions about where to focus resources and what investments to prioritize. Beyond immediate needs, we must understand the long-term economic implications of shifting our operating model across 19 countries, ensuring sustainability and maximizing impact.

2. Primary Objective

Heifer International invites qualified consultants or firms to submit proposals to serve as a Strategic Finance Partner supporting financial modeling, transformation budgeting, and strategic resource alignment.

This engagement will:

Design a **Strategy-Led Financial Framework** that enables the organization to:

- Understand the true cost drivers of deep organizational change.
- Identify where strategic investments in people, systems, and capability-building will accelerate transformation momentum. Embed adaptation.
- Align resources with both immediate operational needs and long-term cultural shifts.

3. Scope of Services

Phase 1: Retrospective Analysis (Costs to Date)

- **Baseline Audit:** Analyze transformation costs to date to establish a comprehensive baseline. Identify specific variance drivers, spending trends, and investments made throughout the transformation journey.
- **Cost Segmentation:** Clearly distinguish between "Running Costs" (ongoing operational expenses) and "One-Time Scaffolding Costs" (temporary support structures required for change management).
- **Visualization:** Build a dashboard that tells the "Investment Story"—to show how resources have fueled specific capabilities.

Phase 2: Forward-Looking Resourcing Plan



- **The Scaffolding Model:** Develop a financial model that explicitly separates "Scaffolding Costs" (temporary change support) from "Operational Costs" (ongoing run-rate expenses).
- **Integrated Resourcing Plan & Roadmap Alignment:** Collaborate with TSC, finance and other key stakeholders to ensure the financial model links directly to the operational roadmap. If the roadmap shifts based on strategic learnings, the financial plan must adapt instantly.

Phase 3: Strategic Financial Modeling & Visualization

- **Role Optimization (Interdependence Analysis):** Conduct a "Role-to-Value" analysis across Global, Regional, and Country nodes. Identify structural duplication and model potential savings.
- **Transformation ROI Analysis:** Create a "Value Realization" model comparing the Cost of Change against Efficiency Gains.
- **Unit Cost Analysis:** Establish standardized investment requirements for transitioning country offices to the new "Network Node" structure. Define unit costs for change management, training, and system implementation per country. Extension: Model transition costs for Regional Offices and the Network Support Node.
- **The Donor Investment Case:** Translate internal "Scaffolding" and "Unit Cost" models into external-facing "Investment Packages" for fundraising. Create a menu of funding options (e.g., "Fund the Digital Transformation: \$200k" or "Sponsor a Country Transition: \$150k") that allow donors to fund specific parts of the ecosystem's growth.
- **Sustainability Projection:** Project the long-term financial sustainability of the new operating model, including scenario planning for various growth and funding conditions.
- **Strategic Dashboards:** Build dashboard that maps expenditures to Strategic Focus Areas, with additional recommended visualizations for stakeholder communication and decision support.

Phase 4: Adaptive Budgeting & Learning Loops

- **Adaptive Budgeting Framework & Learning:** Design a review rhythm for "Adaptive Budget Planning." Recommend regular review rhythms that enables agile tradeoff decisions based on strategy and learning. Create a mechanism where funds are released based on *validated learning* (evidence of success), rather than automatic entitlement.
- **Adaptive Re-Forecasting:** Build the workflow for rapid reallocation.

Phase 5: Knowledge Transfer & Sustainability

- **Enablement & Knowledge Transfer:** Provide capacity building for TSC and key stakeholders to maintain and update models and dashboards independently. Ensure the system remains sustainable and internally manageable after the engagement concludes.

4. Key Deliverables

Deliverable	Description
Transformation Investment Dashboard	A comprehensive "Costs to Date" visualization showing variance drivers, spending trends, and scaffolding investments throughout the transformation journey.



18-Month Transformation Resource Plan	A strategic resource allocation document mapping financial resources to roadmaps and capability-building outcomes through FY27, with clear separation between Scaffolding investments and Operational expenses.
The Scaffolding Model	A comprehensive financial model that distinguishes temporary change support costs from ongoing operational run rates, enabling clearer decision-making about transitional versus permanent investments.
Network Optimization Analysis & ROI	A detailed report quantifying potential savings from eliminating role duplication, with specific recommendations for resource reallocation to maximize organizational impact.
Unit Cost Analysis & Business Case	A definitive cost model for transitioning Countries, Regions, and Network Nodes, including a consolidated business case comparing Cost of Change versus long-term Efficiency Savings.
The Donor Investment Menu	A suite of externally-facing "investment packages" with clear pricing for transformation modules, formatted for immediate use in grant proposals and donor communications.

5. Success Criteria

By the conclusion of this engagement, Heifer International will have achieved:

- **Enhanced Transparency & Prioritization:** Clear visibility into resource allocation with the ability to make thoughtful, data-backed decisions about investments and priorities.
- **Strategic Cohesion:** Integration between financial planning and organizational strategy, structure, and culture, ensuring resources support strategic objectives.
- **Shared Stewardship:** Demonstrated collective ownership of financial health across teams, with increased engagement in resource planning, management and learning.
- **Sustainable Capacity:** Measurable progress toward building sustainable internal capabilities.

6. Consultant Qualifications

The ideal consultant will demonstrate:

- **Strategic FP&A Expertise:** Proven experience transitioning organizations from backward-looking accounting to forward-looking, strategic resourcing and financial planning.
- **Documentation Excellence:** Demonstrated ability to build client-friendly, transparent financial models that are intuitive to update and maintain.
- **Transformation Experience:** Deep understanding of the temporary cost structures ("Scaffolding") required during major organizational change, with experience modeling the financial dynamics of transformation initiatives.
- **International NGO Experience:** Familiarity with country office structures, regional hub operations, and non-profit cost allocation methodologies and constraints.

7. Submission Requirements

To apply, please submit a comprehensive proposal by **APRIL 1, 2026**, **May 1, 2026** including the following components:

1. **Professional Background:** Current CV or resume highlighting relevant experience with strategic financial planning, organizational transformation, and international development work.



2. **Proposed Methodology:** Detailed approach for addressing the scope of work, including work plan, key milestones, and anticipated timeline.
3. **Work Sample:** A de-identified example of a strategic financial model or dashboard you have developed, demonstrating your approach to complex financial modeling and visualization.
4. **Budget Proposal:** Estimated total cost for a 12-16 week engagement, including breakdown of fees, anticipated expenses, and payment schedule.

8. Evaluation Process

Proposals will be evaluated by a cross-functional review committee using the following weighted criteria:

Evaluation Matrix

Evaluation Criteria		Weight (%)	Score (0–5)
A	Technical Expertise & Modeling <i>Focuses on the ability to build the "Scaffolding Model" and "Unit Cost" structures</i> Strategic FP+A Capability: Evidence of moving organizations from backward-looking accounting to forward-looking strategic resourcing. Model Sophistication: Ability to build "Role-to-Value" and "Value Realization" (ROI) models. Visualization Skills: Quality of the submitted work sample; ability to build "Investment Story" dashboard that are intuitive and client-friendly.	35	
	Transformation & NGO Context <i>Focuses on the consultant's understanding of the unique Heifer International environment.</i> Scaffolding Concepts: Demonstrated understanding of temporary vs. permanent cost structures during deep organizational change. Global/Local Fluency: Familiarity with international NGO structures (Country Offices, Regional Hubs) and non-profit cost allocation. Fundraising Alignment: Ability to translate internal data into external "Donor Investment Packages."		25
C	Methodology & Adaptive Approach <i>Focuses on how the consultant will execute the 12–16 week engagement.</i> Workplan Realism: Is the timeline for Phases 1-5 realistic and logically sequenced? Adaptive Budgeting: Does the proposer understand how to build "learning loops" where funds are released based on validated success? Sustainability & Knowledge Transfer: Clear plan for enabling the TSC team to maintain models independently after the engagement.	20	
	Budget and Value for Money <i>Focuses on the financial proposal</i> Cost Competitiveness: Is the total fee reasonable for the 12–16 week duration?		20



Transparency: Does the budget include a clear breakdown of fees, expenses, and a logical payment schedule?		
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9. Terms & Conditions

- Heifer International reserves the right to accept or reject any proposal.
- Selection does not guarantee contract award until formal agreement execution.
- All materials submitted become property of Heifer International.
- Confidentiality and data protection compliance required.

10. Payment terms:

Payment Conditions

- Payments will be made within 30 days of invoice submission.
- Each payment is subject to formal approval of deliverables by managing department.
- Travel and field-related expenses must be clearly itemized in the financial proposal.
- Any additional activities outside the agreed scope require prior written approval.

11. Award Process and Contract Mechanism

No	Activity	Due Date
	Proposal reception	April 1, 2026 May 1, 2026
	Processing and selection	April 7, 2026 May 6, 2026
	Interviews	April 7-10, 2026 May 11-13, 2026
	Notification of award	April 13, 2026 May 15, 2026
	Award agreement negotiation	April 16, 2026 May 19, 2026
	Signing award	April 24, 2026 May 20, 2026

Heifer will issue a fixed award agreement based on the submission and Heifer’s acceptance of deliverables.

Once an award is issued, it will include the payment schedule with the deliveries specified above.

12. 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 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 in response to the RFP.

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