



REQUEST FOR PROPOSAL (RFP)

Consultant: Adaptive Project Management

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

Scope of Work: Adaptive Project Management Framework

Project: Digital Architecture & Adaptive Project Management Framework for the Transformation, Strategy & Communications (TSC) Node

Duration: Hybrid: Project Deliverables + Fractional Retainer

1. Project Background

Heifer International is transforming to become an agile, adaptive, locally led, and globally connected organization. The Transformation, Strategy & Communication (TSC) team is responsible for stewarding this work—providing the "connective tissue" that aligns the organization. We are moving from a "Strategy Design" phase to an "Operational Activation" phase. We need a Project Management Consultant Partner to build an adaptive project management framework - helping us sense what is happening, connect interdependent workstreams, spot opportunities for integration and to provide fractional process stewardship throughout the engagement.

2. Primary Objective

- To design, build, and deploy a "TSC Adaptive Project Management Framework." This system will not merely "track tasks" for reporting. It will map the relationships between our transformation initiatives, enabling the TSC to "hold the whole" and ensure resources flow to the right strategic priorities. Crucially, this system must be adaptive—capable of handling emergent work and "Living Systems" dynamics—rather than functioning as a rigid, waterfall project tracker.
- The consultant will provide "Project Management as a Service," acting as a fractional facilitator for the TSC node. Beyond technical configuration, this partner will steward the roadmap and facilitate adaptive rhythms, ensuring that as new session data and learnings come in, the project plan is adapted in real-time.

3. Scope of Services

Ongoing Service Layer: Embedded Project Management & Facilitation (*This consulting service runs continuously across all phases below*)

- Fractional Project Leadership: Act as the "hands-on" project manager for the TSC node.
- Adaptive Planning & Reflection: Act as the "Keeper of the Plan." As new session data, implementation realities, and strategic learnings emerge, you will proactively update the

roadmap. You ensure the plan remains a living document that reflects reality, not a static artifact.

- **Phase Transition Management:** Proactively manage the friction between phases, ensuring the TSC team has the necessary assets, clarity, and support to move smoothly from "Diagnostic" to "Activation".

Phase 1: Diagnostic & System Selection

- **Information Audit:** Assess the specific data we need to track (e.g., flexible spend, cross-functional dependencies, strategic impact).
- **System Recommendation:** Evaluate and recommend the simplest, most effective tool (e.g., Asana for task flow vs. Airtable for relational mapping vs. Monday.com).
 - *Constraint:* Must handle "Living Systems" dynamics—flexible, tagged, and networked—rather than rigid waterfall hierarchies.

Phase 2: Architecture

- **Mapping the Ecosystem:** Design an architecture (Portfolios/Projects) and strategic tagging structure.
- **Ontology of Stewardship & Learning:** Create Custom Fields that help us tell the story of the transformation, allow for sense-making and learning, not just the status:
 - *Strategic Connection:* (Which of the 5 Focus Areas does this serve?).
 - *Engagement:* (Who is leading? Country Node, cross-functional team, etc).
 - *Integration/Connection Type:* (Is this siloed work, or a cross-functional squad?).
 - *Outcome Field:* What did we learn.
- **Transparent Access:** Configure permissions to default to "Open" (where safe), reinforcing our move from "need to know" to "transparent by default."

Phase 3: Roadmap Support, Migration & Activation

- **Translation & Documentation:** Act as the "synthesizer." Translate loose notes, whiteboard sessions, and high-level goals into structured, 3,6,12,18 month roadmaps.
- **Gap Filling:** As you organize the plans, identify practical gaps (e.g., "You have a Q3 goal but no Q2 activities listed").
- **Digitization & Migration:** Do the manual work of entering these roadmaps into the new digital system. This is not just data entry; it is structural migration, ensuring dependencies are linked and milestones are clear.
- **The "Coherence Map":** Once migrated, configure a dynamic master view to visualize the entire ecosystem and its interdependencies.
- **Dashboard Creation:** Build dashboards designed for "Sense-Making" and "Pulse Checks"—visuals that show real-time transformation information (not just task completion, but status and *outcome* progress).

Phase 4: Flows & Rhythms

- **Service-Oriented Intake:** Build simple forms that position the TSC as a *partner*, not a gatekeeper. (e.g., "How can the TSC support your node?" vs "Submit your project for approval").
- **Rhythm as Ritual:** Automate the TSC's internal rituals (Sprint Planning, Retrospectives) so the team spends less time *organizing* the work and more time *discussing* the insights.
- **The "Investment" View:** Build a view for the transformation spend that tells an investment story: "*We are spending X to unlock Y capability,*" rather than just tracking a declining budget balance.



Phase 5: Enablement

- **The "TSC Playbook"**: Create a lightweight guide (videos + One-Pager) on *How We Work in the System*.
- **Team Training**: Deliver two virtual workshops covering basics (norms) and advanced topics (managing squads/portfolios).

4. Key Deliverables/Artifacts

Deliverable	Description
System Recommendation	A brief diagnostic recommending the best tool for our specific data needs.
TSC Portfolio Structure	A master view visualizing the ecosystem, tagged by strategic categories.
Templates	Reusable templates for launching new Initiative Squads with pre-set tasks, milestones, and "connection points" (e.g., prompts to check in with Culture leads).
Dashboards	Visuals designed for "Pulse Checks"—showing real-time status, budget-to-strategy alignment, and interdependencies.
Automation Library	A set of active Asana Rules that manage task handoffs and status updates automatically.

5. Success Criteria

- **Coherence**: The TSC team can answer "How does Project X relate to Strategy Y?" in one click.
- **De-Siloing**: Teams begin tagging dependencies across functions (e.g., Ops tagging Culture) without prompt.
- **Trust**: Stakeholders view the system as a "helper" that gives them visibility, rather than a "tracker" that monitors their compliance.

6. Consultant Qualifications

- **INGO / Mission-Driven Experience**: Must understand that our "bottom line" is impact and capacity building, not just speed. Experience in environments where relationship is as important as task.
- **Systems Thinker**: Someone who sees organizations as living networks, not machines.
- **Work Management Architect**: Technical mastery of tools (Asana, Airtable, etc.), applied with a "human-first" design philosophy.
- **Facilitator of Clarity**: Ability to look at a messy list of tasks and ask the right questions to organize them into a coherent strategy.
- **Agile Fluency**: Understands that we are building for *Adaptive Capacity*, not rigid waterfall planning. Capable of setting up Kanban/Scrum workflows.
- **Change Management**: Experience implementing tools in non-technical teams (Focus on simplicity over complexity).

7. Submission Requirements

To apply, please submit a comprehensive proposal by **APRIL 1, 2026**, including the following components to RFP@HEIFER.ORG with the SUBJECT "**Consultant: Adaptive Project Management**".



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1. **Professional Background:** Current CV or resume highlighting relevant experience with strategic financial planning, organizational transformation, and international development work.
2. **Your Approach:** How would you execute the "Diagnostic Phase" to select the right tool? How would you approach Phase 3 (Roadmap Support) to help a busy team get their ideas out of their heads and into a system?
3. **Case Studies:** Brief examples of similar systems built for mission-driven or networked organizations.
4. **Budget & Timeline:** Please provide a quote that accounts for both the Fixed System Build and the Monthly Retainer for embedded support.

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)	Weighted Score
Coherence and Practicality of the Overall Approach	20	0	0
Understanding of the Work and Its Adaptive Nature	20	0	0
Strength of Systems Design Thinking	15	0	0
Ability to Translate Strategy into Structured Execution	15	0	0
Adaptive Workflows and Team Rhythms	10	0	0
Depth and Practicality of Enablement and Knowledge Transfer	10	0	0
Dashboard and Visualization Capability	5	0	0
Consultant Capability and Contextual Fit	5	0	0

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
	Processing and selection	April 7, 2026
	Interviews	April 7-10, 2026
	Notification of award	April 13, 2026
	Award agreement negotiation	April 16, 2026
	Signing award	April 24, 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.

