

Request for Proposals

Improving Governance of the Northeast Transition Initiative Non-Profit Partnership

Issued August 2026

The Northeast Transition Initiative (NETI), through its lead partner Cooperative Development Institute (CDI), is soliciting applications from subject matter experts capable of assisting the three managing non-profit partner organizations to develop the shared operational policies and infrastructure necessary to support the NETI initiative. In particular, subject matter experts are needed to assist the partnership in developing an operational plan for shared administration of NETI, development and engagement of partners, and shared fundraising.

Background

The Northeast Transition Initiative (NETI) is not currently its own incorporated entity; it is a partnership of nine separate non-profit organizations dedicated to expanding worker ownership of businesses, particularly through worker cooperatives, throughout New England and New York. The partnership is led by three “managing partners” - Cooperative Development Institute (CDI), Cooperative Fund of the Northeast (CFNE), and ICA Group, with CDI taking the role of “lead partner.” Staff hired under the NETI initiative are housed within CDI, and CDI has acted as the grant agent for the partnership - submitting grant applications and receiving and disbursing grant funds to the other partners. The other six partners are members of a broader “advisory group” whose role, to this point, has been support for the NETI mission, providing thought partnership on NETI initiatives, and providing staffing to working groups.

Project Details

NETI was launched in 2023 with the mission of expanding worker-owned business cooperatives throughout the northeastern United States and New York. In 2026, the NETI partners laid out a new, ambitious ten-year strategic vision of creating an ecosystem within the northeast and New York that can support the transition of 100 businesses per year to worker-owned cooperatives. The resulting increase in scope and complexity of NETI shared assets, operations, and decision-making has created a need to reevaluate our organizational structure and governance as well as the management of “day to day” operations to better fit our current and future scale.

NETI is now at a stage of growth where NETI-specific infrastructure is needed - processes for file management, development of NETI-specific databases and policies and processes related to ownership and management of those systems, and operational plans for management of shared staffing and shared fundraising. Additionally, a year ago, NETI moved from a “program director” model of governance to shared governance via an 8-person steering committee staffed by representatives of the three managing partners, which has created additional complexity around managing NETI-dedicated staff.

We have also identified a need to refine our partnership framework in order to clarify and support engagement of non-managing partners and a need to develop an overall vision and process for how to handle fundraising for the NETI initiative. We are seeking proposals from qualified consultants to facilitate the development of these operational and engagement frameworks.

Key Questions the Project Will Address:

Assistance is requested in three distinct areas (referred to as “Topics” within this RFP):

1. Governance and Back-End Administration / Operationalization of NETI
2. Development and Engagement of Partners
3. Collaborative Fundraising

The scope of work for each of these three areas is detailed on the next page. Consultants may apply to assist in 1, 2, or all 3 areas. Applications should specifically address applicant's qualifications related to each distinct area for which they are applying.

Key questions to be answered by the end of the project include:

- Establishing clear operational roles, management, and oversight of personnel dedicated to the NETI initiative
- Establishing clear infrastructure, protocols, and operational roles related to ownership, management, and oversight of NETI-related shared administrative systems, including shared data management systems and related data
- Defining roles and expectations for managing and non-managing partners
- Establishing a coordinated approach to NETI-specific fundraising

Consultant Responsibilities:

The selected consultant(s) will work with the members of the NETI steering committee (8 individuals representing the three managing partner organizations) to develop detailed recommendations for answering the questions detailed in the Scope of Work. This work may utilize any or all of the following methods: 1:1 interviews with steering committee members, facilitated group discussions with subsets of the steering committee members (e.g. group conversation with each managing partner's steering committee members), facilitated group sessions of the entire steering committee, 1:1 interviews with non-steering committee NETI partners and other stakeholders, and focus groups with non-steering committee NETI partners and other stakeholders. The work may take place virtually or in-person, though, please note, the steering committee members are spread across Maine, Massachusetts, and New York, and these organizations all work remotely. There is no physical office location for any of these partners that can be utilized for in-person meetings. For these reasons, in-person meetings for this group, though valuable, are expensive and difficult to arrange. Consultants recommending one or more in-person sessions as part of the work plan should address this in their proposal and explain the expected benefits of any proposed in-person sessions.

Selected consultant(s) will design recommendations for the NETI partnership based on their own expertise in partnership-systems building in the related Topic areas specified in this RFP, recommended best practices from the field, and from facilitated discussions to guide the steering committee in crafting solutions. The final recommendations (for each Topic area consultant is selected to work on) are to be delivered to the steering committee in a formal, written report that includes a proposed implementation plan. Please note in your proposal any plan to utilize AI to research or write any part of the final recommendations.

In their proposal, consultant should address the anticipated timeline for completing the work - start date of work, completion date of work, anticipated number of hours required to complete the work, and how those hours will be structured (e.g. # anticipated facilitated group discussions and how those will be structured, such as "one 8-hour strategic planning retreat" or "four two-hour virtual meetings"). While there is flexibility in the timeline, we anticipate starting work no sooner than September/October 2026 and completing the work no later than December 2027; start of the work is dependent upon receipt of anticipated grant funding. When planning the work timeline, please note that the partners are closed Thanksgiving Day, the day after Thanksgiving, and the week between Christmas and New Year's Day.

Project Scope / Key Questions to Be Answered

Topic	Problem Statement	Deliverable of Consultant Process	Key Questions to be Answered
Governance and Back-End Administration / Operationalization of NETI	NETI is currently structured as a partnership, rather than an organization, and, as such, there is no dedicated infrastructure for long-term ownership of shared computer files, contact lists, and other intellectual property, management of shared / dedicated staff, and management of “day to day operations” of NETI	Detailed operational plan for administration & management of NETI operations - including reporting relationships, decision authority and process, and supervision & performance review	A. Governance 1. How do we move business forward in a timely fashion, while avoiding burn out or detracting from partners’ primary work responsibilities? - What is an appropriate and sustainable meeting cadence? - What types of work and information sharing need to happen in a meeting versus in between meetings? How do we make sure the right people are in the room to make decisions effectively and efficiently? - How do we share information in a manageable way that helps people engage with information shared asynchronously? How are informal / ad-hoc conversations between members to be recorded and shared with relevant parties? - What work is delegated to working groups, and how are they held accountable for getting work done? How do we ensure that working groups have active contributors beyond the steering committee to prevent burnout and expand leadership? 2. Steering Committee membership and succession policies - What is the criteria to be a NETI managing partner? How is the decision made to add or remove managing partners (organizations)? - How are individual staff representatives to the steering committee decided? - How are replacements selected if an individual member has to leave? 3. Development of policies - current decisions / policies live in meeting notes. Do we need formal policy write ups? A handbook? Where should these live? B. Program/Staff Management 4. Management / Oversight of NETI staff - Who do NETI staff (Project Manager and Fellowship Coordinator) report to and seek guidance and support from in decision making? - How much autonomy do NETI staff have in designing and executing infrastructure, projects, etc.?

			- How is staff performance assessed and who is doing the assessing? - What are the guidelines / trigger for determining when dedicated NETI staffing is needed versus when work can / should be handled by a working group? C. Infrastructure 5. What shared systems and intellectual property do we need to think about? Where will these various shared systems live and how will they be administered for the long-term? - Current items include: website (currently OwnershipTransition.org) (who to maintain [currently CDI staff]), how to share ownership, responsibility for updating, etc., Tools for Ownership curriculum assets (videos, guides, etc.), data management system, shared records (docs, spreadsheets, files, contacts, etc.) - Which partner will have “ownership” of the accounts (e.g. which org’s credit card is going to be charged monthly/annually for related accounts)? - Are there ways to “own” shared data and learning management systems that aren’t tied to one particular partner? - Are there ways to protect the partnership in the event a partner with system hosting responsibilities exits the partnership?
Partnership Development and Partner Engagement	Our current partnership structure and utilization, especially around non-managing partner engagement, doesn’t feel robust enough to meet the needs of our strategic plan	Detailed plan for meaningful and value-added (for both them and us) engagement of non-managing partners in the NETI initiative	1. What do we mean by partnership? - What is the role of partners? - Are there different tiers of partnership? - Are there long-term versus short-term partners? Full versus partial partners? etc. 2. What are the rights, responsibilities, and benefits of each tier? What “skin in the game” are partners expected to put in - does this vary by tier/type of partner? 3. What is the criteria and mechanism for assessing performance of partners and removing non-performing partners? 4. Do we need formal partnership agreements for steering committee members, and if so, how are those to be structured re: the percent of time/resources spent by each partner on big picture visioning / strategy development (steering committee participation) and execution of work / tasks (e.g. running the fellowship, creating an ecosystem map, creating curriculum videos, etc.). Do we need formal partnership agreements for non-steering committee partners?

			5. How are partner relationships held and managed - currently, they are mostly held through 1:1 connectivity to one of the steering committee members. How do we connect partners to “NETI the entity” rather than to one or more individuals associated with NETI? 6. How and when to add and / or subtract partners? - How big should the NETI partnership be? - What is the trigger point for knowing we need to add more partners? - What is the criteria for new organizations wanting to join the partnership?
Process for Developing a Fundraising Plan	Our fundraising approach to date has been opportunistic and reactive - responding to funding opportunities that come across our (collective) desks. We need to be more proactive and we also need to become more intentional in our fundraising efforts in order to secure adequate resources to carry out our strategic plan while simultaneously being mindful not to poach funders / funding opportunities from the partners’ individual organizations / funding needs.	Creation of collaborative fundraising structures to help us better populate and manage a larger funder pipeline while simultaneously ensuring we are not cannibalizing each partners’ funding.	1. Who has responsibility for overall fundraising strategy and coordination? - Who decides the “vision” for a NETI fundraising plan (fundraising “pitch” / what we have to “sell”), which funders / funding opportunities should be pursued, and the timeline for achieving the fundraising plan? - how do we prevent impeding / cannibalizing of partners’ existing individual funding relationships and opportunities? - who will “project manage” the fundraising plan / ensure applications are being written and submitted in a timely manner? - who holds responsibility for directing and who will do the work of cultivating “invite only” funders? 2 . What shared systems and roles are needed for the partnership to coordinate around fundraising (prospecting, tracking, application writing, scoring/prioritizing funders) — and who staffs these roles (dedicated staffing or utilization of existing partner fundraising staff)?

Project deliverables:

The selected consultant(s) will create and deliver (to the NETI steering committee) a written set of specific, detailed, and actionable recommendations and phased implementation plan(s) for enhancing NETI operations for each Topic area on which they are selected to work.

How to Apply:

- Consultants may apply to assist in 1, 2, or all 3 of the Topic areas listed in the Scope of Work on the previous pages. Applications should specifically address applicant's qualifications related to **each** distinct Topic for which they are applying.
- Submit entire proposal as **ONE PDF document** - all attachments (including resumes) should be included in a single document; proposals not submitted in PDF format or which contain multiple files or which do not contain all required materials will not be read.
- While there is no specific format for proposals, the main proposal should not exceed **five pages per Topic with which you are applying to provide assistance (e.g. if applying to provide assistance in two Topic areas, you may submit a narrative of no more than 10 pages total, of which 5 pages would address experience and approach to the first Topic and the other 5 pages would address experience and approach to the second Topic)**. There is no limit on number of pages for the required additional materials (references and resumes), but these additional materials must be part of your ONE PDF file application / submission.

Proposals should address:

- **Experience:** Overview of relevant expertise in facilitation, particularly with nonprofit sector clients, and understanding of best practices in nonprofit governance and management.
- **Approach:** Description of proposed approach, including detailing staffing plan - number of staff from consultant's organization, roles / tasks to be undertaken by each, and number of hours each will work on the project.
- **Anticipated Scope of Work and Timeframe:** Plan for accomplishing the work— activities, format, and timeframe required to complete the project.
- **Budget:** Detailed cost proposal, including hourly rate for staff working on the project.
- **Previous Clients/References:** Provide a list of previous clients, as well as references. Briefly describe the scope of the work for these references, the year completed and a contact name, email address, and phone number for each one.
- **Resumes:** Provide resumes of any staff who will work on the project.

Evaluation Criteria

Proposals will be evaluated based on:

- Relevant experience and references
- Knowledge of best practices in nonprofit governance and management
- Knowledge of best practices in nonprofit multi-agency partnership governance and management
- Clarity and feasibility of the proposed approach
- Cost-effectiveness of the proposal

Timeline and Submission Requirement

Proposals should be received no later than Friday, September 4, 2026 at 5:00 pm EDT. No late proposals will be accepted. Incomplete proposals will not be considered. Please submit all materials via email to Terri Bruce, NETI Project Manager at tbruce@cdi.coop. Questions regarding this request for proposals / the scope of work may also be submitted to tbruce@cdi.coop. No phone calls.