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30 May 2023

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Proposal for Global Greengrants Fund – To support Capacity-Building to Design and Implement Pilots of New Ideas and Strategies

Context Summary

Global Greengrants Fund (GGF) issued a Request for Proposals (RFP), calling for consultant(s) to support Capacity-Building to Design and Implement Pilots of New Ideas and Strategies.

This proposal is designed to demonstrate that the capability and capacity of Annekatrin Madlung of Global Recourse and Noel Warnell (the Consultants) are well matched to prepare for and deliver on the objectives and achieve the deliveries as indicated in the Term of Reference (ToR) of the RFP.

The consultancy team of Annekatrin Madlung and Noel Warnell was chosen to provide the expertise and skills required for the project and to provide a diversity of perspectives.

We are looking forward to designing a programme that meets the needs of GGF.

We submit our proposal below in response to the RFP and look forward to an opportunity to discuss the proposal further.

Following the details in the RFP and information provided during a Q&A session with Eva Rehse and Shena Cavallo, the remainder of this proposal is outlined as follows:

1. Required Expertise and Experience
2. Approach and Methodology
3. Project Management
4. Budget and Terms of Payment

Required Expertise and Experience

The table below summarizes our skills aligned with the requirements of the ToR:

Required Expertise for the Project	Team Qualifications
Designing and running pilots and prototyping for non-profits in participatory and intersectional way	- Annekatrin has 25+ years working with global Human Rights and Humanitarian Aid organizations where she has delivered workshops introducing the four core elements of agile ways of working. - Noel has been co-designing and running pilots with organizations for over 10 years. - We are both experienced practitioners and certified experts in Agile, in which pilots and prototyping are key. - Due to the work we have undertaken with globally diverse organizations, we understand the importance of intercultural facilitation to foster genuine commitment and liberate considerable energy.
Training experience and imparting of knowledge is critical	- Since training as a primary school teacher Noel's work has been centered on education and helping others learn new skills and processes. This has most recently been focussed on agile practices and frameworks. He also mentors scrum masters and agile coaches in the early stages of their career. - Annekatrin's workshops always contain training elements that are then also practiced. From a neuroscience perspective, insights are born and truly manifested in learning through exploration and discovery and the exchange of thoughts.
Great facilitator of creative processes with multiple stakeholders across a number of time zones	- Annekatrin is a member of the International Association of Facilitators and a member of the Mural Consultants Network - Facilitation tools such as Liberating Structures, and tools from Session Lab and the International Association of Facilitators, Zoom screen share; breakout rooms, Mural and shared GoogleDocs will be used to enhance engagement of participants in focus groups. - Workshops include playful and fun exercises, to increase creativity, create a safe environment and the space for exploration.

	- Annekatrin has developed and facilitated numerous workshops for hybrid teams working in different time zones and understands the requirements and constraints that come with it. - Noel created and has been running the monthly public 'Facilitator Lab' since 2018. Over 250 experiments have been run to date in the lab.
Broad range of experiences in communicating change processes and systems changes	- We apply a human-centered systems thinking approach that addresses needs and requirements from the individual, the team, management and the organization. - Annekatrin is certified in "Brain-based Team Coaching" which includes aspects of the neuroscience behind change and human reactions to change. Annekatrin weaves the insights this certification provides into communication, training and workshops that include aspects of change, in particular systemic change, habit change and mindset change. - Noel's visual facilitation and graphic recording skills are key in helping people to 'see' problems, challenges and solutions
Connecting strategic design to learning	- Noel's work includes helping Executives and board members in global organizations to create Objectives and Key Results, which directly connect Strategy to tangible actions and learning. This tool also ensures everyone at every level in the organization knows how they contribute to the bigger picture.
Able to move projects along and deliver them to timeline and budget, while also being able to pick up on emergent ideas and strategies	- As Delivery Director at Reason, Noel is responsible for managing project budgets, timelines and outcomes for a portfolio of c.10 clients and c.15 projects worth >£5m per year. Through a collaborative and iterative approach he helps clients navigate uncertainty, and adapt over time. - Annekatrin has extensive experience at managing large budgets for programmes and projects, adhering to timelines. - In a true agile fashion, we will conduct reflection sessions regularly to enable us quickly to adapt and change where necessary.
Flexible, not just in terms of time zones, but also with GGGF as an organization engaged in emergent strategy and change	- While based in the UK, Noel and Annekatrin regularly facilitate workshops and provide training across all timezones.

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processes, and understand the realities of movements and activists engaged in justice struggles	● We understand the external and internal influences and pressures that are present in and around organizations that work in the civil society sector and may require to pivot. We are happy to adapt and be flexible.

Examples of work: Please note that all recent work of both Consultants has resulted in confidential internal reports, which we cannot share. Case Studies and testimonials/recommendations can be found on LinkedIn and our websites. Links to these can be found in the short Bios of Annekatrin Madlung and Noel Warnell in Addendum 2.

Approach and Methodology

Approach

The Consultancy team will design this project in line with the following principles:

1. **Sustainability:** Resources and activities are intended to increase capability of participants to be able to learn through piloting and prototyping.

2. **Transformation:** The support provided will aim to foster the competence at the individual, team, and organizational level.

3. **Being client-centered:** Support will be tailored to organizational and individual needs to align this project with the redesign of the organizational architecture currently underway at GGF.

4. **Diversity and inclusion:** Our ways of working aim to uncover and engage diverse perspectives and intersectionality during the peer learning aspects of the workshop facilitation.

5. **Evidence-based best practice:** Our experimental and iterative process provides rapid learning and insights to inform next steps

Methodology

The methodology is based on experiential and participatory learning.

We understand that there are 10 people to be trained. They may become champions (Change Agents) to support the implementation of the change in GGF and its network.

Learners will be introduced to the theory of prototyping and piloting during a series of virtual workshops. Then, with support from the Consultants, they will consolidate and develop their learning practically, by running three or four pilots.

These will perform the dual purposes of improving the Learners' skills in running pilots and delivering organizational learning as a result of the piloted activities themselves.

While the workshops and the pilots are separate components, we believe it is important that they are seen as linked, and that they build upon each other. As a developmental programme, key themes will emerge, and resources and style of support will be adapted or augmented to address needs.

Delivery

The project will be broken down into the following stages:

Phase 1: Planning and Design Stage

Phase 2: Training and Workshops

Phase 3: Co-design and run 3 to 4 Pilots

Phase 4: Handover and presentation of final report

Phase 1: Planning and Design

Inception meetings with GGF focal point

During these initial meetings with the GGF Focal Point, the GGF Focal Point and the Consultants will agree:

- key materials for review by the Consultants. These documents are intended to help the Consultants gain a deeper understanding

- the focus of each workshop element

- a final timeline and success criteria

- the type and amount of support required from the Consultants for the "in-person meeting of GGF's network" in July 2023

Desk review of briefing materials

The Consultants will perform a desk review of the materials gathered from the initial meetings.

Provide support to GGF's network meeting in July

The support required will be identified in the inception meetings.

The amount of support and time required from the Consultants will impact the time remaining for the rest of the programme. Therefore, the timeline will need to be reviewed when we are more certain of what the scope of this requirement is.

Design of programme

A series of workshop modules will be planned, covering:

1. An introduction and exercises to explore and learn about Piloting / Prototyping, including practicalities of pilots and how to run them

2. Tools:

   a. How to Deliver for Learning

   b. How to "Reflect to Learn"

   c. How to Improve

   d. Why and how to adopt and iterative process

3. Generate a list of possible experiments. Prioritize. Design and plan first pilot

4. Optional: If time allows and required by GGF, we propose a workshop to explore the role the Learners may take as Change Agents

Phase 2: Workshop delivery

Online Workshops will be held over a total of 2.5 to 3 half days and timing agreed with the organization, to suit GGF's work schedule.

The Consultants will facilitate the sessions on Zoom which will be hosted by GGF.

Phase 3: Co-designing, phasing and running of pilots/prototypes

At the end of the workshops, the Consultants and Learners will decide on the first of the activities that they wish to prototype. Under the guidance of the Consultants, the Learners will then plan the pilot, and set it in motion. Each pilot will run for 5 weeks.

We think that running all four pilots over 3-4 months with 10 Learners is not sustainable or effective with respect to the desired engagement and learning. We therefore propose that the first pilot will be with all 10 Learners. After that the group will be split into halves and subsequent pilots will be run concurrently. All Learners will join all of the reflection sessions, and as many check-in sessions as appropriate.

We are open to discuss this further with GGF.

During the pilots the Consultants will meet with the Learners as described in Addendum 1.

Phase 4: Handover

A final report of the workshops, participants' learning and lessons learnt will be provided to include a summary of training contents and resources to support future pilot schemes to be run by GGF themselves in an independent, professional and effective way.

Project Management

Key Outputs and Timeline

The project is anticipated to commence mid-June and completed by December 2023.

The timeline below is indicative only and will need to be further discussed with GGF to be adapted accordingly. It will be reviewed in an iterative and adaptive process at key points throughout the project.
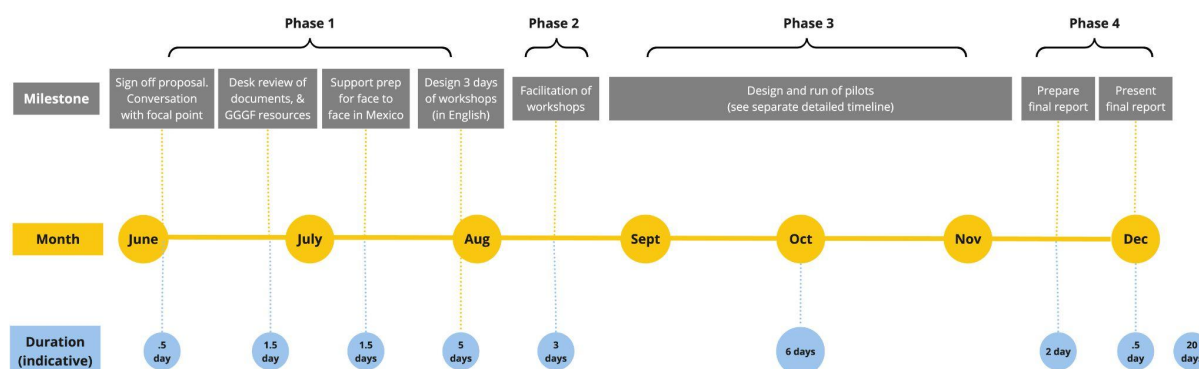
Coordination

The Consultants will report to Focal Point, Eva Rehse, Director of Strategy and Global Collaboration. It is anticipated that all the work will be undertaken remotely.

Budget and terms of payment

Annekatrin Madlung of Global Recourse with Noel Warnell will co-lead this work. Noel will be contracted by Global Recourse, the principal consultant and facilitator, and will invoice Global Recourse for his work.

Face-to-face Delivery:

This proposal is for online delivery. Delivery in person will incur additional costs for travel, accommodation, refreshments/meals and materials for each of the Consultants.

Travel days will be charged at the normal rate, with a minimum of one half day.

In-person delivery at the network meeting in Mexico is not required in the ToR and therefore is explicitly out of scope of this work. If this is required then the Consultants will be happy to quote for this activity separately.

Terms of payment and schedule:

Global Recourse is registered in England and banks in GBP. We will invoice GGF in US Dollars. Costs such bank charges are shared between Global Recourse and GGF.

Global Recourse does not charge UK Value Added Tax (VAT).

Payment is due within 30 days of the invoice date.

1. 50% upon signature of agreement
2. The remaining 50%: upon delivery of the project

Failure to pay by the due date may result in additional charges; Global Recourse shall be entitled to charge the client a late payment fee of between £40 – £70 and interest at 8% p.a. plus the Bank of England base rate as per the County Court Act 1984.

Rescheduling / Cancellation Charges:

Short-notice rescheduling of workshops and meetings (including cancellation) causes disruption to the Consultants and a loss of usable time and consequent earnings. Therefore meetings canceled with less than two working days' notice will be charged at the full rate.

Cost Basis (no VAT charged)

Item	Total Days of Consultancy	Day Rate	Total
Preparation and delivery of work items as proposed	20	USD 1,500	USD 30,000
Should additional hours/days be required, this will be agreed in advance with GGF.			

Addendum 1: Example Pilot Schedule

During each pilot, the Consultants will meet with the Learners[1]:

Week 1: 2 × half hour check-in sessions: These check-ins allow the Learners and Consultants to share experiences and insights as the pilot comes up to speed.

Week 2: 1 × half hour check-in sessions: These check-ins allow the Learners and Consultants to share experiences and insights as the pilot comes up to speed.

Week 3: Pause / 2 hours Reflect / Improve or Stop: As part of the running of a pilot, this is the opportunity to course-adjust. This is combined with an opportunity and to allow us to learn through reflection (part of the training process for the Learners).

Week 4: 1 × half hour check-in session: A single check-in is sufficient between the two longer reflection sessions in weeks 3 and 5.

Week 5: 1.5 hour reflection session at end of the week: to capture organizational learning from the pilot and developmental learning for the Learners.

Week 4 or 5 (Week "0" for next iteration): 1.5 to 2 hour planning session for next iteration: Each pilot will be planned the week before it starts – which is either the 4th or 5th week of the previous iteration. The Learners will be able to use the outcomes of previous reflection sessions to improve the way they approach planning.
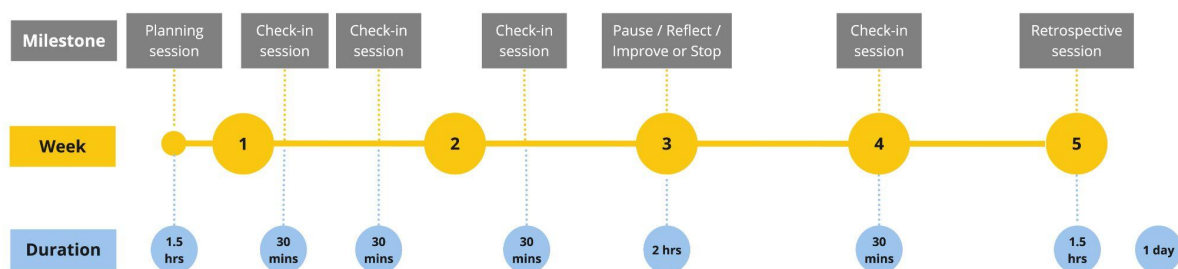
Iteration: The process will be repeated, with the Learners split in two, and each group taking on another "sandbox" topic (as mentioned in the ToR). Learners will be able to apply the lessons from one iteration into the next. The guidance given by the Consultants will move from a directive to a more coaching style, to reflect the Learners' development.

Depending on the agreed schedule, there may be a final iteration. This would be used to assess how well the Learners have been able to understand and apply the training they have been given. They will run pilots with minimal intervention from the Consultants, who will facilitate a reflection session at the end.

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[1] This is the schedule for the first pilot. The schedule will change as the Learners' needs evolve

Addendum 2: Short Bios

Annekatrin Madlung is a Strategic Operations Consultant, Workshop Facilitator, Founder and CEO Global Recourse, a management and business improvement consultancy that truly partners with clients to co-create and deliver human-centered solutions that holistically transform business operations, policies and processes.

Annekatrin's work has included delivery of comprehensive frameworks for Well-being, Global Security, Agile working and Collaborative working where she has delivered several strategic initiatives for globally diverse organizations.

Annekatrin's experience leading up to the formation of Global Recourse in 2017 spans more than 20 years within a global organization delivering business critical projects inclusive of Global Security, Organizational Restructuring, Workplace Transformation, Training Design & Delivery, Event Management, Crisis & Emergency Response.

Annekatrin is an Affiliate at the Agile Business Consortium.

In addition to her work as a business consultant, she also provides mentoring services to individuals, groups of people, SMEs and start-up businesses. She is a member of the Association of Business Mentors and mentor as part of the UK government's "Help to Grow: Management Programme". She also provides business mentoring to sole traders and micro-business in association with the Enterprise Britain's Small & Mighty programme.

As a Member of the International Association of Facilitators, Annekatrin shares their vision to see professional facilitation used throughout the world to address the challenges faced by people in their groups, organizations and communities.

As a Fellow of the "Royal Society for the encouragement of Arts, Manufactures and Commerce" (RSA), Annekatrin is part of a large global community of active problem solvers who are motivated by a shared set of values and the change they want to see. She is a Member of the Steering Group of the Coaching Network of the RSA.

Annekatrin has presented at numerous industry events/conferences. She is a member of Toastmasters International and in particular the Pegasus Advanced Toastmaster Club.

Website: https://globalrecourse.com/ – case studies: https://globalrecourse.com/case-studies/

LinkedIn: Annekatrin Madlung

Noel Warnell is an enterprise agile consultant, facilitator, Kanban University trainer, ICF professional coach, and occasional sketchnote artist.

Noel regularly speaks at conferences and meetups on the topics of Agile, Lean Portfolio Management, Facilitation, Feedback and Breaking Tsundoku (how to read more books). Over the last 12 months this includes being invited to appear on 3 podcasts, speaking at 4 meetups and 3 conferences. He also hosts 2 regular events, the Facilitator Lab and the Creative Coaching Playground.

The majority of Noel's work is to support organizations to adopt agile ways of working and develop their digital strategy. Recent clients in Deutsche Bank, Diageo, Levis and Wall Street English.

Website: https://www.noelwarnell.uk/

LinkedIn: Noel Warnell