



REQUEST FOR PROPOSALS (RFP)

Strategic Plan Refresh & Facilitation Services

Issued by: *First 5 Napa County*

Issue Date: *November 20, 2025*

Proposal Due Date: *December 4, 2025*

1. Introduction

First 5 Napa County is seeking proposals from qualified consultants or consulting firms to lead a Strategic Plan Refresh process. This engagement includes:

A. Strategic Planning Mini-Sessions (Three Board Meetings)

B. Board Retreat Planning & Facilitation

C. Ongoing Thought Partnership

Our organization is entering a new stage of growth and requires a fresh, inclusive look at our strategic direction. The selected consultant will guide our board and leadership team in assessing our current strategic plan, identifying strategic priorities, and aligning organizational goals with our mission and emerging opportunities. The purpose of this project is not to build out an entirely new strategic plan, but to refine and update our existing strategic plan. The updated plan will serve as our north star for fiscal year 2026/27 through fiscal year 2029/30.

2. Project Objectives

The primary objectives of this engagement are to:

1. Refresh and refine our existing strategic plan to reflect current context and opportunities, align with foundational state requirements, and prioritize fiscal sustainability.
2. Engage the Commission and Executive Director in meaningful strategic conversations and decision-making, that will strengthen overall strategic alignment and direction.
3. Provide ongoing strategic thought partnership to the Executive Director.



3. Scope of Work

The consultant will be responsible for delivering the following services:

A. Strategic Planning Mini-Sessions (Three Board Meetings)

- Design and co-facilitate (with the executive director) a series of three focused strategic planning sessions, each 45–90 minutes in length.
- Sessions will support phased strategic discussions (e.g., environmental scan, priority-setting, impact measurement, strategic direction alignment).
- Provide pre-read materials and exercises, as needed.
- Capture key discussion points and recommendations after each session.

B. Board Retreat Planning & Facilitation

- Design and co-facilitate, with the executive director, an approximately six-hour retreat (retreat in March or April, exact date TBD).
 - Attend an executive committee meeting in March to collective design input on the final retreat agenda.
- Retreat should include:
 - Reflective activities assessing progress under the current strategic plan
 - Identification and prioritization of strategic goals
 - Team-building activities to strengthen trust and collaboration among board members
- Prepare a retreat agenda, materials, and follow-up summary documenting outcomes and next steps.

C. Ongoing Thought Partnership

- Provide advisory support to the Executive Director throughout the process.
- Participate in scheduled check-in meetings (estimated 4-8 hours monthly January to May 2026) to review progress, prepare for board activities, and offer guidance.
- Support synthesis of insights from meetings and retreat into refined strategic plan language.



D. Deliverables

Key deliverables include:

- Detailed project timeline and engagement plan
- Agendas and materials for all board sessions and the retreat
- Summaries or memos following each meeting
- Draft and final Strategic Plan Refresh document (format to be determined)
- Recommendations for implementation, performance indicators, and communications as appropriate

4. Project Timeline

The anticipated project timeline is:

- **RFP released:** Thursday November 20, 2025
- **Proposals due:** Thursday December 4, 2025
- **Consultant selected and notified:** On or before Wednesday December 10, 2025
- **Project begins:** Monday January 12, 2026
- **Board mini-sessions:** Occurring February 23, 2026, March 23, 2026, May 18, 2026 board meetings
- **Board retreat:** March/April– exact date TBD
- **Draft plan delivered:** May 8, 2026
- **Final plan delivered:** June 3, 2026

Timeline may be adjusted in consultation with the selected consultant.

5. Consultant Qualifications

Ideal applicants will demonstrate:

- Proven experience in strategic planning for nonprofits or mission-driven organizations
- Expertise in group facilitation, board development, and retreat leadership



- Strong communication skills and culturally responsive facilitation practices
- Ability to synthesize complex input into concise strategic documents
- Experience supporting executive leaders through change processes
- Build understanding and familiarity with [First 5 Napa County and our current strategic plan](#)

6. Proposal Requirements

Please include the following in your proposal:

1. **Letter of Interest** summarizing your approach and understanding of the project
2. **Description of relevant experience**, including examples of similar work
3. **Proposed methodology and work plan**, including timeline
4. **Facilitator(s) bios**
5. **Project fee structure**, including:
 - Total cost
 - Estimated hours
 - Breakdown of major components
6. **References** (at least two past clients)

Proposals should be no more than 10 pages (excluding résumé attachments).

7. Budget

First 5 Napa County has budgeted approximately \$15,000 for this project. Proposers may suggest an alternative budget with justification.



8. Submission Instructions

Please submit your proposal electronically as a single PDF to:

Contact: Ashley Walker

Title: Executive Director

Email: ashley@first5napa.org

Phone: 1(707) 384-3101

Proposals must be received by **Thursday December 4, 2025.**

9. Evaluation Criteria

Proposals will be evaluated based on the following factors:

- Demonstrated understanding of project goals and needs
- Relevant experience and qualifications
- Quality and clarity of proposed approach
- Cost and value
- References and past performance

10. Questions

Questions may be submitted to Ashley Walker at ashley@first5napa.org by Monday December 1, 2025. Responses will be provided within one business day.