Learning Roadmap Bidders Conference



Wednesday, November 4, 2026 · 12:00 p.m. PT

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How today works

We’re recording

The recording and a written Q&A summary will be posted on CVCF’s website. Submit an intent to bid to get answers by email.

Use the Q&A box

Chat is off. We’ll answer what we can live, and every question goes into the written answers on November 11.

The RFP governs

Only the written RFP and addenda are binding. If anything said today differs, the RFP wins.

Captions are on

Turn them on with the CC or Show Captions button at the bottom of your Zoom window.

Why CVCF is investing in this

Christy Patch, Chief Impact Officer

- **The work is sensitive.** Our work regularly involves racially, culturally, politically, and emotionally sensitive issues, inside CVCF and in the community.
- **Learning should build.** Past learning came in one-off sessions. We want a multi-year approach where each experience builds on the last.
- **We should model it.** Staff and board who engage across differences with skill and confidence, so CVCF models the bridge-building we ask of partners.

One RFP, two phases, one decision point

PHASE 1 · DESIGN

Learning Roadmap

About five months, starting late January 2027. Ends with the Roadmap and a Year 1 implementation plan and budget.

DECISION

CVCF decides

Reviews Phase 1 deliverables. Phase 2 is not guaranteed.

PHASE 2 · IMPLEMENTATION

Learning Navigator

Annual agreements, each ending with a performance review. Terms negotiated after Phase 1.

Every proposal covers both phases. Phase 1-only proposals will not be considered.

Who the learning is for

~30

Staff

In Fresno, Merced, and remote. Learning field trips about three times a year.

23

Board members

Meets every other month, with an annual two-day retreat and room for short added sessions.

Hybrid

By default

In person where the content calls for it, such as empathy work and intensives.

In person: Some Phase 1 work happens at CVCF’s Fresno and Merced offices. Travel is included in the fixed fee. Other work can be virtual.

The Learning Navigator

Trainers will change over several years. The Navigator keeps quality and sequence steady.

Six core functions, three supplemental

Core: all six, each priced

- Annual planning
- Trainer recruitment and selection
- Contracting and logistics
- Learning continuity
- Quality and participant experience
- Progress and budget reporting

Supplemental: propose what fits

- Sustainability resources
- Organizational advisory
- Evaluation

Price each one you offer separately. You won’t lose points for declining one.

Why the Learning Navigator matters to CVCF

Christy Patch, Chief Impact Officer

- **Added, specialized capacity.** A Navigator brings expertise in designing and coordinating multi-year learning, plus support recruiting and contracting trainers.
- **Real choice.** Staff see more than one option for major topics, not whoever happens to be available.
- **Learning that lasts.** Sequence and quality hold steady through turnover, on our side or a trainer's.
- **Respect for staff time.** Tell us how you'll keep the load on staff and board reasonable.

How the contracts work

CVCF
One annual agreement

Learning Navigator
Holds the trainer subcontracts

Trainers and partners
CVCF doesn’t contract with them directly

Partnering is allowed

A smaller firm can partner for core work like subcontract payments. The lead firm stays responsible.

The Navigator can train

Approved, priced, and reviewed like any provider, and billed separately. CVCF sees full evaluation results.

CVCF’s staff lead covers

Internal calendars, rooms, invitations, staff and board communications, and invoices. Don’t price these in.

How proposals are scored

Criterion	Points
Phase 1: Learning Roadmap design	**80**
1. Qualifications and team	35
2. Approach, methodology, and sustainability	25
3. Central Valley knowledge and local partnership	10
4. Phase 1 cost	10
Phase 2: Learning Navigator	**20**
5. Learning Navigator capacity	15
6. Learning Navigator pricing	5
Total	**100**

Screening comes first

- On time and within the page limit
- Base Phase 1 fee at or below $50,000
- Required qualifications shown
- Both phases addressed

Qualifications and team: 35 points

The lead consultant brings these directly

1. Multi-year organizational learning design, beyond individual trainings

2. Equity, inclusion, and cross-difference work in mission-driven organizations

Why: the lead firm owns the design and the equity lens, not a subcontractor.

Phase 1: the team can cover

- Needs assessment: interviews, surveys, and synthesis
- Sensitive group dynamics, including board, leadership, and staff power differences
- Clear written products for leadership and board

Phase 2: lead or a named implementation lead

- Coordinating multiple trainers or providers
- Managing subcontracts, schedules, and budgets
- Overseeing quality and continuity across providers

Training delivery is separate. You don’t need to name trainers now. Most are identified in Phase 1 and subcontracted in Phase 2.

Approach and sustainability: 25 points

Sustainability here means the learning lasts, through turnover and after the engagement ends. It isn't about financial sustainability.

Approach

- A clear, proportionate input process tailored to CVCF
- Evidence and frameworks, cited briefly
- A realistic timeline and an estimate of staff and board time

Equity and safety

- Your approach to equity, bridge building, and dialogue
- A concrete example from the lead consultant's own work
- How you keep participants safe and respond to harm

Sustainability

- Onboarding that carries learning through turnover
- Internal capacity, such as internal facilitators
- Measures and an annual review
- A plan for after the first two to three years

What reviewers look for

Required core qualifications

The lead consultant personally brings multi-year learning design and equity work. Partners fill in the rest.

A real example

Show the lead consultant's own role in equity and bridge-building work.

Local partners, defined roles

Worth 10 points. Proposals with identified local partners in defined roles score highest.

A time estimate

Say how much executive, staff, and board time Phase 1 needs, and how you keep it reasonable.

12 pages, firm

Parts B and C combined, tables included. Reviewers stop reading at page 12.

Both leads at interview

Finalists interview by Zoom in mid-December. The lead consultant and implementation lead attend.

Pricing on a common basis

PHASE 1 · FIXED FEE

$35,000–$50,000

- Itemized by deliverable, all expenses in
- Base fee must not exceed $50,000
- Optional enhancements priced separately; only the base is scored
- Payment milestones tied to deliverables

PHASE 2 · YEAR 1 ESTIMATE

Navigator fee only

- No trainer costs
- Assume about 12 sessions, mostly audience-specific, delivered by 3 to 5 trainers
- Itemize core functions; price supplemental functions separately
- Disclose any markup; list hourly rates

Value drives the cost score, not the lowest price.

Key dates

Nov 6

Written questions due, 5:00 p.m. PT. Intent to bid (optional).

Nov 11

Answers and any addenda posted.

Nov 20

Proposals due, 5:00 p.m. PT, one PDF by email.

Mid-Dec

Finalists invited mid-December; interviews by Zoom the week of December 14.

Early Jan

All proposers notified.

Late Jan

Phase 1 begins.

Until award, all communication goes through **rfp@centralvalleycf.org**. Please don’t contact CVCF staff, board, or reviewers about the RFP.

Questions

Type your question in the Q&A box. Anything we can't answer today goes into the written answers on November 11.

Thank you








Questions by Nov 6, 5:00 p.m. PT

Answers posted Nov 11

Proposals due Nov 20, 5:00 p.m. PT

rfp@centralvalleycf.org