CENTRAL VALLEY COMMUNITY FOUNDATION

Request for Proposals

The Learning Roadmap: Building CVCF Capacity for Connection, Dialogue, and Impact

Issuing organization	Central Valley Community Foundation (CVCF)
Opportunity	Design of a multi-year Learning Roadmap for CVCF staff and board, with potential implementation
Phase 1 budget	$35,000 to $50,000, fixed fee, inclusive of all expenses
Phase 2	Learning Navigator fee proposed by bidders (negotiated after Phase 1); trainer costs set in the Year 1 plan
RFP issued	Friday, October 23, 2026
Bidders conference	Wednesday, November 4, 2026, 12:00 p.m. PT, virtual and recorded
Intent to bid (optional)	Friday, November 6, 2026 (preferred but not required)
Written questions due	Friday, November 6, 2026, 5:00 p.m. PT
Answers posted	Wednesday, November 11, 2026
Proposals due	**Friday, November 20, 2026, 5:00 p.m. PT, by email as a single PDF**
Anticipated start	Late January 2027
Contact	rfp@centralvalleycf.org

I. About CVCF

Since 1966, the Central Valley Community Foundation (CVCF) has been a trusted partner in philanthropy. CVCF's mission is to connect capital and communities for a just and thriving Central Valley. CVCF works with community, civic, and philanthropic partners on collective impact strategies, including Fresno DRIVE, Sierra San Joaquin Jobs (S2J2), and the Farms, Food, Future (F3) Initiative. We convene diverse partners, develop shared agendas and investable plans, secure funding, and evaluate results.

This work regularly involves racially, culturally, politically, and emotionally sensitive issues, both inside the organization and in the community. CVCF is investing in a multi-year learning strategy so its staff and board can engage across differences with skill and confidence, and so CVCF can model the bridge-building work it asks of its partners.

This investment is intended to strengthen both CVCF's internal culture and its ability to work effectively with community partners across differences.

II. Purpose

A Learning Roadmap is a multi-year plan for staff and board learning. It sets out what CVCF will learn, who each part is for, the order it happens in, and the formats it uses, so that each learning experience builds on the last rather than standing alone.

CVCF seeks a consultant to design a two-to-three-year Learning Roadmap for its staff and board, and to support implementation if CVCF chooses to proceed.

The Learning Roadmap must:

- Be built on input from CVCF staff, board, and leadership.
- Be grounded in evidence and established practice.
- Treat staff and board as one aligned strategy, with depth that varies by role.
- Sequence learning so it builds over time.
- Create conditions where participants can engage safely and leave with practical skills they can apply.
- Sustain learning through turnover, including onboarding for new staff and board members.

The engagement is structured in two phases:

- **Phase 1, Learning Roadmap design.** Ends with delivery of the Learning Roadmap and a Year 1 implementation plan and budget, which CVCF reviews before deciding whether and how to proceed.
- **Phase 2, implementation.** If CVCF proceeds with the Phase 1 consultant, that consultant serves as Learning Navigator under separately negotiated annual agreements. In CVCF's preferred structure, the Learning Navigator holds and manages the trainer subcontracts, and each year ends with a performance review. Phase 2 terms are negotiated, and CVCF is under no obligation to proceed with the Phase 1 consultant.

The expertise involved spans several fields, including organizational development, human resources, racial equity, dialogue and bridge building, and leadership development. No single provider is expected to cover every topic. The lead may also deliver learning where it has the relevant expertise. CVCF is looking for a lead who can design a coherent Learning Roadmap, bring in the right specialists, and hold the work together over time.

What success looks like:

- CVCF staff have greater capacity to support groups with differing views in reaching productive outcomes in community and committee settings.
- CVCF's workplace culture supports honest conversation, feedback, and trust within and across teams.

- The board has an established practice for engaging contested community issues together.
- New staff and board members are brought into a shared language and practice through onboarding, so the work does not depend on who is in the room.
- CVCF has a clear plan, rhythm, and process for continuing the learning after the initial two to three years.

III. Scope of Work

Participants and Setting

CVCF has approximately 30 staff and a 23-member board of directors. Staff work from offices in Fresno and Merced and remotely. Learning is hybrid by default, with in-person delivery where the content calls for it, such as work on empathy and vulnerability, and for intensives. Staff take part in learning field trips about three times a year. The board holds an annual two-day retreat, meets every other month, and can occasionally add short sessions. The Learning Roadmap should be ambitious but realistic about the time staff and board members can devote to learning, and should integrate learning into existing organizational rhythms wherever practical.

The scope below describes what CVCF needs. Proposers may recommend adjustments based on their expertise and should explain why.

Phase 1: Learning Roadmap Design

The selected consultant will:

1. **Gather stakeholder input**
    a. Meet with the CVCF executive team to confirm the input process and gather leadership perspective.
    b. Develop and conduct an input process that includes staff, board members, and leadership.
        i. Methods may include group interviews, individual interviews, surveys, and facilitated discussions.
        ii. For planning purposes, CVCF anticipates approximately two group interviews, four to six individual interviews, and an opportunity for all staff to provide input.
        iii. Proposers may recommend alternative approaches that achieve broad participation while minimizing demands on staff and board time.
2. **Synthesize and validate findings**
    a. Summarize themes, areas of agreement, and areas of difference across roles and groups.

b. Review preliminary findings with CVCF leadership and designated staff representatives to check for accuracy, identify gaps, and inform Learning Roadmap priorities.

3. **Design the Learning Roadmap**
    a. Identify and prioritize learning areas, and sequence them across two to three years so learning builds over time.
    b. Briefly cite the evidence and frameworks that inform the design. A full literature review is not expected.
    c. Design a learning structure that includes:
        i. **Foundational learning:** shared knowledge, language, and expectations across the organization.
        ii. **Role-based learning:** differentiated learning for the board, managers and supervisors, community-facing staff, and other groups as appropriate.
        iii. **Individual development:** coaching, self-assessment, reflection, affinity spaces, and peer learning.
        iv. **Continued practice:** practice labs, facilitated discussions, workshops, and communities of practice.
    d. For each priority learning area, identify the intended learning outcomes, target audiences, recommended format (in-person, virtual, or hybrid), approximate timing, and relationship to other learning activities.
    e. Address implementation considerations, including:
        i. Supporting participants with different levels of experience and comfort with topics such as racial equity, bridge building, and power dynamics.
        ii. Deciding which learning is required and which is optional, and how participants can step out of a session when needed.
        iii. When joint board and staff sessions are appropriate, and when separate tracks serve people better.
        iv. Safeguards against harm, including how trainers are vetted and how participant concerns are handled.
4. **Build in sustainability and evaluation.** Recommendations in this section should be actionable, with suggested owners and timing.
    a. Recommend how learning carries into onboarding for new staff and board members, for example through a condensed onboarding session, written materials, or recorded summaries.
    b. Recommend ways CVCF can build internal capacity to sustain the work, such as internal facilitators or practice leads.

c. Recommend practical measures of participation, learning, application, and organizational change, along with a process for reviewing results and adjusting the Learning Roadmap annually. Recommend a baseline assessment, completed before Year 1 begins, that draws on existing data where possible. For pre- and post-assessment, established, validated instruments are preferred over custom-built surveys.

d. Flag organizational policies, systems, or practices that may reinforce or undermine the learning goals. Detailed advice on addressing them is a Phase 2 supplemental function.

e. Recommend how CVCF continues the learning after the initial two to three years, once the Learning Navigator engagement ends. Address who owns the work internally, how often learning occurs, how priorities are revisited, and when refresher learning is warranted for staff and board.

5. **Identify potential training partners**
    a. Identify candidate individuals or organizations for the priority learning areas, with relevant experience, areas of expertise, and potential fit with CVCF. Detailed vetting takes place in Phase 2.
    b. Include qualified Central Valley providers alongside regional and national expertise.
    c. Identify components the consultant or its proposed team could deliver, and disclose any financial or organizational relationships with recommended providers.
    d. Where feasible, confirm provider interest and availability. Cost estimates for the Year 1 implementation plan may be based on market rates.
6. **Develop a Year 1 implementation plan and budget.** The plan will serve as the basis for CVCF's Phase 2 decision and any subsequent negotiations.
    a. Propose Year 1 learning activities, target audiences, potential trainers, delivery formats, timing, and estimated costs.
    b. Distinguish trainer fees, Learning Navigator fees, travel and materials, and other anticipated expenses; identify key assumptions; and note which costs are confirmed and which are estimated.
    c. Use the Learning Navigator fee proposed in the consultant’s proposal as the starting point for the Year 1 budget. Any proposed adjustment must be justified by changes in scope or assumptions, documented in writing, and approved by CVCF.
7. **Review and finalize with CVCF leadership**
    a. Present the draft Learning Roadmap and Year 1 implementation plan to CVCF executive leadership and designated representatives.

b. Incorporate one round of consolidated feedback.
c. Submit final deliverables for CVCF review and approval.

Phase 1 deliverables

- Stakeholder input plan
- Findings summary
- Learning Roadmap, including sustainability and evaluation recommendations
- Training partner list
- Year 1 implementation plan and budget

CVCF Review and Approval

At the conclusion of Phase 1, CVCF will review the final deliverables and determine whether to authorize Phase 2.

CVCF may elect to negotiate a Phase 2 agreement with the Phase 1 consultant, including the Learning Navigator function and associated implementation responsibilities. Phase 2 is not guaranteed. CVCF may choose a different implementation arrangement, including assigning functions differently, engaging other providers, or implementing the Learning Roadmap through another arrangement. Appendix B describes how CVCF may adjust the assignment of functions.

CVCF will retain ownership of the final Learning Roadmap, implementation plan, and training partner information developed under Phase 1, subject to any clearly identified third-party intellectual property or licensing restrictions.

Phase 2: Learning Navigator (if authorized by CVCF)

The Learning Navigator will coordinate implementation of the approved Learning Roadmap, maintain continuity across learning activities and providers, and help CVCF assess progress and adjust the program over time. Phase 2 will be established through annual agreements, subject to CVCF approval.

CVCF approves each year's implementation plan. Significant changes to priorities, providers, scope, or budget require CVCF authorization. The Learning Navigator will bring proposed adjustments to CVCF leadership through quarterly progress reviews, or sooner when decisions are time-sensitive.

Core functions. Proposers must demonstrate the capacity to perform all core functions and price them separately. CVCF's preferred structure assigns these functions to the Learning Navigator, although CVCF may negotiate a different arrangement before contracting or at annual renewal (see Appendix B).

1. **Annual planning**

a. Work with CVCF leadership to set each year's priorities, activities, schedule, providers, and budget, consistent with the approved Learning Roadmap.
b. Gather staff and board input at least annually to shape the next year's plan.

2. **Trainer recruitment and selection**
    a. Identify, vet, and recruit qualified trainers and learning partners.
    b. Present proposed providers and their approaches to CVCF for approval before contracting.
    c. Proposed providers may include the Learning Navigator organization itself. When they do, the Learning Navigator discloses this, explains why, and documents the alternatives considered.
    d. For major topics, including all-staff sessions and content addressing identity, race, or community conflict, involve designated staff representatives in reviewing proposed trainers and approaches before CVCF makes its selection. The Learning Navigator will recommend a practical review process that minimizes staff time.
3. **Contracting and logistics**
    a. Hold and manage trainer subcontracts and payments.
    b. Coordinate trainer availability, session scheduling, materials, and delivery requirements.
    c. CVCF’s staff lead coordinates internal calendars, meeting space, invitations, and communications with staff and board.
4. **Learning continuity**
    a. Orient each trainer to CVCF's goals, context, and prior learning.
    b. Keep the sequence intact across providers, and maintain a record of learning delivered.
    c. In Year 1, set up common delivery tools, such as session templates, feedback forms, and materials standards, and update them each year.
5. **Quality and participant experience**
    a. Write participant safety standards into every trainer subcontract, with a clear way to report concerns.
    b. Monitor delivery, gather participant feedback, address concerns with CVCF, and recommend adjustments when learning is not meeting expectations.
    c. Provide CVCF complete evaluation results and de-identified participant feedback, with individual confidentiality protected. Concerns requiring organizational action are brought to CVCF through an agreed process.
    d. When a trainer is not meeting expectations, recommend corrective action. CVCF approves any material change in providers.

6. **Progress and budget reporting**
    a. Track implementation against the approved schedule and budget.
    b. Lead quarterly progress reviews with CVCF leadership and participate in an annual performance review.

Supplemental functions. These functions are part of the overall implementation approach but may be performed by the Learning Navigator, CVCF, or another designated partner. Proposers should identify the functions they can provide and price them separately. Proposals will not be penalized for declining a supplemental function. CVCF will decide how each supplemental function is assigned during Phase 2 negotiation and may revisit the assignment each year. Whoever performs a supplemental function, the Learning Navigator coordinates with them and builds the results into annual planning.

1. **Sustainability resources.** Coordinate development of materials that help learning outlast any single session or cohort, such as onboarding content for new staff and board members, recorded summaries, reflection tools, and tools for project leads to apply learning in the initiatives they lead. Initiatives with their own governance, such as Fresno DRIVE, decide their own learning.
2. **Organizational advisory.** Advise CVCF leadership on policies, systems, and practices that reinforce or undermine the learning goals.
3. **Evaluation.** Measure participation, learning, application, and organizational change, using validated tools when possible, and report results to inform the Learning Roadmap. Routine session feedback is part of the Learning Navigator's core quality function.

Alternative Arrangements. Appendix B describes CVCF's preferred structure for Phase 2, including the contract structure and safeguards when the Learning Navigator also delivers training. Proposers may recommend shared or blended arrangements for supplemental functions, provided they clearly identify who is responsible for each. The Learning Navigator may draw on team members or partners to perform core work.

IV. Consultant Qualifications

This engagement requires two kinds of capacity: designing a multi-year learning strategy based on input and a needs assessment (Phase 1), and managing trainers, contracts, schedules, and budgets so the learning holds together over time (Phase 2).

Training delivery is separate from both. The lead firm or team members may deliver some learning where they have the expertise, but most trainers will be identified in Phase 1 and subcontracted in Phase 2. Proposers do not need to name them now.

A single firm may cover both phases, or a lead consultant may assemble a team, with different people leading each phase. Either way:

- Every proposer must demonstrate qualifications for both phases. Proposals for Phase 1 only will not be considered.
- Qualifications may be met by the lead consultant and proposed team together, except where noted below.
- The lead firm holds the contract and is responsible for both phases.
- CVCF prefers that the personnel named in the proposal remain on the engagement for its full duration.
- The lead consultant and implementation lead are key personnel. Substitutions require CVCF's prior written approval, and any replacement must have comparable qualifications.

Required Qualifications: Phase 1, Learning Roadmap Design

1. Experience conducting organizational needs assessments, including stakeholder interviews, surveys, and synthesis of qualitative and quantitative input.
2. Experience designing organizational learning and development strategies, including multi-year strategies that go beyond delivering individual trainings. The lead consultant must meet this qualification directly.
3. Experience facilitating, advising on, or designing learning related to equity, inclusion, and cross-difference dialogue in mission-driven or nonprofit organizations, with a clearly articulated approach to integrating this work into organizational learning. The lead consultant must meet this qualification directly.
4. Experience navigating sensitive group dynamics, including power differentials between board, leadership, and staff, and creating learning environments where participants can engage safely.
5. Ability to produce clear, practical written products for leadership and board audiences.

Required Qualifications: Phase 2, Learning Navigator

These may be met by the lead consultant or a clearly identified implementation lead within the proposed team.

1. Experience coordinating multiple trainers, providers, or subject-matter experts within a single project.
2. Experience managing contracts or subcontracts, schedules, budgets, and associated administrative responsibilities.
3. Experience overseeing the quality and continuity of learning or professional development programs involving multiple providers.

Preferred Qualifications

1. Experience working with community foundations/philanthropic organizations, community-facing organizations, or community-based organizations.
2. Knowledge of the Central Valley's communities, regional dynamics, and civic landscape, or established partnerships with Central Valley-based practitioners.
3. Experience supporting board learning, including helping boards engage complex or contested community issues.
4. Experience building sustainability into learning programs, such as onboarding integration, train-the-trainer models, or internal facilitator development.
5. Experience incorporating trauma-informed practices into organizational learning.
6. Experience designing or delivering learning in hybrid formats.

V. Proposal Requirements

Proposals should be organized in the sections below, in this order. Parts B and C correspond to the Phase 1 and Phase 2 scoring categories in Section VI. The 12-page limit applies to Parts B and C combined. Section VIII lists what is excluded from the limit and formatting requirements.

A. Cover letter (one page)

1. Name of the lead firm, lead consultant, and primary contact.
2. Location of the firm and any Central Valley presence.
3. Signature of a person authorized to commit the firm.
4. Disclosure of any current or recent paid relationships with CVCF, its board members, staff, or initiatives. Disclosure does not disqualify a proposer.
5. Use of AI. If artificial intelligence tools were used to prepare any part of this proposal, disclose this and briefly describe how they were used. Disclosure does not affect scoring. Proposers remain responsible for the accuracy of all content.
6. Openness to collaboration. State whether you are open to CVCF considering parts of your proposal in combination with another proposer's work, for example as a partner or subcontractor to the selected Learning Navigator. Your answer will not affect scoring.

B. Phase 1: Learning Roadmap Design

1. **Approach and methodology.** Describe how you will carry out each step of Phase 1 in Section III, including any adjustments you recommend to the proposed scope and why.
2. **Equity and bridge-building approach.** Describe your approach to designing organizational learning related to racial equity, bridge building, and dialogue across differences. Provide a specific example demonstrating the lead consultant's direct

role in applying this approach, including how differences in perspective, experience, or power informed the work and what resulted.

3. **Participant safety.** Describe how you create learning environments where participants can engage safely, and how you respond when a session causes harm or a participant raises a concern.
4. **Sustainability.** Describe how your approach would prepare CVCF to sustain the learning through turnover and after the initial two to three years, including how you would build ownership and capacity.
5. **Staff and board time.** Estimate the time Phase 1 will require of the CVCF executive team, staff, and board members, and describe how your approach keeps that time reasonable.
6. **Work plan and timeline.** Provide a Phase 1 timeline with milestones and deliverables. Phase 1 is expected to begin in late January 2027 and take approximately five months. An example timeline: kickoff meeting by Week 2; stakeholder input complete by Month 2; findings reviewed with CVCF by Month 3; draft Learning Roadmap and Year 1 plan by Month 4; final deliverables submitted for CVCF approval by Month 5.
7. **Central Valley knowledge and local partnership.** Describe your knowledge of the Central Valley's communities and civic landscape, and any Central Valley-based practitioners you would involve.
8. **Team and qualifications.** Identify the lead consultant and each team member, with their role and approximate share of Phase 1 effort. Explain how the team meets the Phase 1 qualifications in Section IV. Identify any subcontractors and their qualifications, and indicate whether each team member and subcontractor is confirmed or anticipated. Attach bios or resumes for all individuals who would work on the engagement.
9. **Relevant experience.** In a single table, list three to four engagements and mark each as learning design, provider coordination, or both. Strong examples include designing a multi-year organizational learning or development strategy and coordinating multiple trainers or providers. For each, give the client type, your role, scope and duration, and how you managed quality and continuity where relevant. This table serves both phases.

C. Phase 2: Learning Navigator

1. **Approach to core functions.** Describe how you would carry out the Learning Navigator's core functions in Section III. Identify the lead consultant or implementation lead for Phase 2 and the proposed staffing structure, with anticipated responsibilities, and explain how coordination, contracting, and decision-making with CVCF would work. Estimate the monthly time your approach would require of the CVCF staff lead.

2. **Supplemental functions.** Identify which supplemental functions you can provide and how.
3. **Capability.** Include a specific example of how the proposed implementation lead has managed coordination, contracting, and quality across multiple providers.

D. Cost proposal (excluded from page limit)

Phase 1 is priced as a fixed fee. For Phase 2, propose a Learning Navigator fee only. Trainer costs are not part of this proposal; they will be estimated in the Year 1 implementation plan once the learning areas are set. Phase 2 prices are estimates. CVCF will use them to compare proposals, and final Phase 2 terms will be negotiated after CVCF approves the Phase 1 deliverables. Phase 2 is expected to begin soon after Phase 1, once the agreement is approved through CVCF's process.

1. **Phase 1 fixed fee.** Itemize the fee by deliverable or task. Include all expenses: travel, materials, survey tools, and subcontractor fees. Propose payment milestones tied to deliverables. CVCF's Phase 1 budget range is $35,000 to $50,000. The base Phase 1 fee must not exceed $50,000. Proposers may also offer optional enhancements beyond the base scope, each described and priced separately. CVCF may accept, decline, or negotiate optional enhancements. Only the base proposal will be scored.
2. **Core Learning Navigator fee.** Provide an estimated annual Year 1 fee for the core functions, itemized by function, with staffing, hours, rates, and key assumptions. For comparability, assume Year 1 includes about 12 learning sessions in total, most of them for specific audiences (such as the board, managers, or community-facing staff) rather than all staff or the full board, delivered by 3 to 5 trainers. This assumption is for comparing Learning Navigator fees only, not for designing the curriculum. Exclude trainer fees. The Year 1 implementation plan delivered at the end of Phase 1 should use the Learning Navigator fee proposed here. If the Year 1 plan differs from this planning assumption, explain the proposed fee change and the reason for it. Any change requires CVCF’s written approval.
3. **Supplemental functions.** Price each supplemental function you can provide separately.
4. **Markups and management fees.** State whether you would add any markup, administrative fee, or management charge to subcontracted work in Phase 2, including trainer subcontracts, and if so, the rate.
5. **Hourly rates.** List hourly rates for all proposed team members.

E. References (excluded from page limit)

Provide three professional references who can speak to your work on comparable engagements, with contact name, organization, email, and phone.

F. Work sample (optional, excluded from page limit)

You may include one example of a prior learning roadmap, strategy, or curriculum outline, with client-identifying information removed if needed.

VI. Proposal Evaluation

Screening. Each proposal is first checked for completeness and responsiveness. Proposals that do not meet the following may be excluded from scoring:

1. Submitted on time and within the page limit.
2. Base Phase 1 fee at or below $50,000.
3. Required qualifications in Section IV shown, including the two the lead consultant must meet directly.
4. Proposal addresses both Phase 1 and Phase 2.

Scoring. A CVCF review panel scores responsive proposals out of 100 points using the criteria below. The highest-scoring proposers are invited to interviews. Final selection is based on written scores, interviews, and reference checks. The lowest-priced proposal will not necessarily be selected.

Criterion	Points	Description
Phase 1: Learning Roadmap Design	**80**	
1. Qualifications and team	35	The lead consultant directly brings experience in multi-year learning design and in equity and cross-difference work. The team covers needs assessment, learning design, and facilitation, with clear roles and level of effort. Past engagements show multi-year learning strategies, not only individual trainings.
2. Approach, methodology, and sustainability	25	The proposal describes a clear, proportionate approach to gathering input and designing the Learning Roadmap, tailored to CVCF. It explains the proposer's approach to equity, bridge building, and dialogue across differences, with a concrete example, and describes the evidence and frameworks that inform its approach. It addresses participant safety, a realistic estimate of staff and board time, and how learning will last through turnover. The timeline is realistic.
3. Central Valley knowledge and local partnership	10	The proposal shows specific knowledge of the Central Valley's communities and civic landscape. It describes a credible approach to involving qualified Central Valley-based practitioners. Proposals with identified local partners in defined roles score highest.
4. Phase 1 cost	10	The base fixed fee offers strong value for the work proposed: reasonable, transparent, and aligned with the scope. It is itemized by deliverable, includes all expenses, and the level of effort is credible for the work described.
Phase 2: Learning Navigator	**20**	
5. Learning Navigator capacity	15	The proposal identifies a qualified implementation lead. It describes a clear process for recruiting and approving trainers, managing subcontracts, maintaining continuity across providers, and addressing quality concerns. It is clear about which supplemental functions the proposer can provide and how it would coordinate with whoever performs the others.
6. Learning Navigator pricing	5	Pricing follows the planning assumption in Section V and excludes trainer costs. Staffing, hours, and rates are shown, itemized by core function. Supplemental functions are priced separately, and any markups are disclosed. Pricing is realistic for the coordination described.
Total	**100**	

VII. Additional Information

Before proposals are due

1. **Intent to bid.** Proposers are encouraged, but not required, to email rfp@centralvalleycf.org by Friday, November 6, 2026, to receive addenda directly. An intent to bid is non-binding.
2. **Bidders conference.** A virtual bidders conference will be held Wednesday, November 4, 2026, at 12:00 p.m. PT. Join on Zoom at https://us02web.zoom.us/j/83834925128. Attendance is optional and does not affect scoring. The recording and a written summary of questions and answers will be posted at https://www.centralvalleycf.org/career.
3. **Questions and addenda.** Submit questions in writing to rfp@centralvalleycf.org by Friday, November 6, 2026, 5:00 p.m. PT. By Wednesday, November 11, 2026, answers will be posted at https://www.centralvalleycf.org/career and emailed to everyone who submitted an intent to bid. Oral answers are not binding. Only written addenda change this RFP.

Selection process

1. This is not a sealed-bid process.
2. **Interviews.** The highest-scoring proposers will be invited to interview by Zoom between December 9 and 16, 2026. The proposed lead consultant and Phase 2 implementation lead should attend.
3. **References.** CVCF may contact the references provided and others familiar with the proposer's work.
4. **Notification.** All proposers will be notified of the outcome in early January 2027.
5. CVCF will not select a proposer that appears unable or unwilling to perform the work successfully.

Contracting

1. The selected proposer will enter into CVCF's standard consulting agreement for Phase 1. If CVCF authorizes Phase 2, it will be contracted through separate annual agreements.
2. The proposer is responsible for the performance of all subcontractors. Key personnel named in the proposal (see Section IV) and subcontractors named for Phase 1 may not be substituted without CVCF's prior written approval. Other Phase 2 staffing will be confirmed during negotiation of the annual implementation agreement.
3. Pricing must remain valid for six months after the proposal due date.
4. Some Phase 1 activities will require in-person work at CVCF's Fresno and Merced offices. Other work may be virtual. All travel costs are included in the fixed fee.

5. The selected proposer must maintain comprehensive liability insurance in the amount of at least one million dollars ($1,000,000) per occurrence and two million dollars ($2,000,000) aggregate and provide a certificate of insurance before work begins.
6. Any use of AI in performing the work is subject to the AI provisions of CVCF's consulting agreement.

Work product and confidentiality

1. **Ownership.** CVCF will own the Phase 1 deliverables, as described in Section III. Materials developed for CVCF in Phase 2, including onboarding resources and recorded summaries, must be licensed for CVCF's ongoing internal use. Proposers should identify any proprietary tools or materials they would use and any limits on CVCF's use of them.
2. **Participant confidentiality.** Information gathered from staff and board is confidential. It may be used only for this engagement. Findings are reported in aggregate, in a way that reasonably prevents participants from being identified, including through their roles or small-group affiliations. The consultant and subcontractors may be asked to sign confidentiality terms.
3. **Use of AI with participant information.** The consultant may not enter identifiable or confidential participant information into external AI tools without CVCF's prior written authorization. Any authorized use must comply with CVCF's consulting agreement and applicable confidentiality and data protection requirements.
4. **Proposals.** Proposals become CVCF's property and will be kept confidential within the review process. Proposers should mark any proprietary information.

CVCF's rights

1. CVCF reserves the right to reject any or all proposals; cancel or modify this RFP; waive minor irregularities; request clarification from proposers; negotiate scope, price, and terms with the selected proposer; and decline to proceed to Phase 2.
2. Proposers bear all costs of preparing proposals and participating in interviews.
3. CVCF does not discriminate in its procurement and encourages proposals from small, local, women-owned, and minority-owned firms.
4. CVCF may ask proposers who indicate openness to collaboration whether they would work with the selected proposer, and may encourage the selected proposer to engage them as partners or subcontractors. Any such arrangement requires the agreement of all parties.

From release of this RFP until award notification, all communication about this RFP should go through rfp@centralvalleycf.org. Proposers should not contact CVCF staff, board members, or review panel members about the RFP. Proposers with current CVCF engagements may continue that work but should not discuss this RFP as part of it.

VIII. Submission Instructions and Timeline

How to submit

1. Email your proposal to rfp@centralvalleycf.org by **Friday, November 20, 2026, 5:00 p.m. PT**. Use the subject line "Learning Roadmap RFP: [Proposer Name]."
2. Submit the proposal as a single PDF. An optional work sample may be attached as a second PDF. If your files exceed 20 MB, contact rfp@centralvalleycf.org before the deadline to arrange another delivery method.
3. Proposals are considered received at the time stamped on the submission email. CVCF will confirm receipt by email. If you do not receive confirmation within one business day, contact rfp@centralvalleycf.org.
4. Proposals received after the deadline will not be considered.

Format

1. Parts B and C of Section V together may not exceed 12 pages. Tables, charts, and graphics within Parts B and C count toward the limit. Reviewers will not read content beyond the page limit.
2. The cover letter (Part A, one page), cost proposal (Part D), references (Part E), work sample (Part F), and bios or resumes do not count toward the page limit.
3. Use letter-size pages, a minimum 11-point font (10-point in tables and charts), 1-inch margins, and page numbers.

Timeline

Dates after the proposal deadline are anticipated and may change. CVCF may extend the proposal deadline if material changes to the RFP are issued.

Milestone	**Date**
RFP issued	Friday, October 23, 2026
Bidders conference (virtual, recorded)	Wednesday, November 4, 2026, 12:00 p.m. PT
Intent to bid (optional)	Friday, November 6, 2026
Written questions due	Friday, November 6, 2026, 5:00 p.m. PT
Answers and addenda posted	Wednesday, November 11, 2026
Proposals due	**Friday, November 20, 2026, 5:00 p.m. PT**
Finalists invited to interview	By Friday, December 4, 2026
Finalist interviews (Zoom)	December 9 to 16, 2026
All proposers notified	Early January 2027
Contracting	January 2027
Phase 1 begins	Late January 2027
Phase 1 complete	Approximately five months after start

Appendix A: Potential Learning Areas

This chart reflects topics raised by CVCF staff, board, and community partners. It is a starting point, not a prescribed curriculum. The selected consultant will confirm priorities and final learning outcomes through the Phase 1 input process (Section III). The areas move from individual practice outward to the organization and the community. The Phase 1 input process should include all CVCF teams, including those whose perspectives may be less represented in the topics below.

Level	Learning area	Intended outcome	Topics	Primary audience
Self	Self-awareness	Participants recognize how their own experiences, assumptions, and reactions shape how they engage with others, and can manage strong reactions in difficult moments.	Recognizing personal assumptions and implicit bias; noticing and managing emotional reactions; understanding how one's background shapes one's views; reflecting on one's own practice; staying open to feedback and learning; practices for staying present under pressure	All staff and board
With others	Communication across differences	Participants listen to understand, stay in conversations through tension or disagreement, and work through conflict in ways that keep relationships intact.	Listening to understand; asking questions with curiosity; understanding other perspectives; difficult and emotionally charged conversations; handling disagreement and conflict	All staff and board
All levels	Race, equity, and inclusion	Participants understand how systemic inequities affect the communities CVCF serves and the organization itself, and apply that understanding to their work, relationships, and decisions.	How systemic inequities developed and persist; learning from lived experiences different from one's own; inclusive policies and practices; supporting colleagues across differences; affinity spaces, including white affinity groups	All staff and board; depth varies by role
Organization	Workplace culture	Staff work in an environment where people feel respected, can speak up, give and receive feedback, and work well across teams.	Conditions where people feel safe to speak up; giving and receiving feedback, including what belongs one-on-one versus in a group setting; inclusive meetings; managing workplace conflict; working across teams and functions; responding with awareness of trauma	All staff; some content for managers

Level	Learning area	Intended outcome	Topics	Primary audience
Community	Community engagement and dialogue	Staff and board can design and lead productive conversations among community members and partners who hold different views, including on contested issues.	Facilitating dialogue with community members and partners; engaging across political differences; managing conflict in community settings; building trust; the Central Valley's history and communities, and how CVCF is seen	Community-facing staff, leadership, and board
Leadership and governance	Leading across differences	Leaders and board members make decisions, lead through controversy, and respond to community tensions in ways that reflect CVCF's values, and model these practices for others.	Seeing problems at the systems level; leading through controversy and community tension; making decisions when people disagree; facilitation for leaders; board and staff roles during conflict; a board practice for engaging contested community issues; applying equity in governance and policy; philanthropy's role in changing systems; management skills for supervisors; applying learning to philanthropic strategy, partnerships, and organizational decision-making	Executive team, directors, managers, and board

Appendix B: Learning Navigator Structure

Why a Learning Navigator

CVCF wants learning that is high quality, safe for participants, and lasting. The Learning Roadmap will be delivered over several years by multiple trainers, and those trainers will change. The Learning Navigator holds quality steady through those changes: it prepares each trainer to build on prior learning, keeps the sequence intact, pays close attention to the participant experience, and handles the logistics so staff and board can focus on the learning itself. This appendix describes CVCF's preferred structure for Phase 2; the core and supplemental functions are described in Section III. CVCF may adjust the structure to fit its needs and internal capacity, before contracting or at annual renewal.

Contract structure

CVCF holds one annual agreement with the Learning Navigator. The Learning Navigator holds subcontracts with the trainers and learning partners who deliver the Learning Roadmap; CVCF does not contract directly with trainers. The Learning Navigator may use team members or partners to perform core functions. For example, a smaller firm may partner with another firm for subcontract administration and payments. The lead firm remains responsible for the work and holds the related contracts. Agreements follow CVCF's calendar-year budget, so the Learning Navigator proposes each year's plan and budget in time for CVCF's budget process. The first agreement may cover a partial year.

When the Learning Navigator also delivers training

The Learning Navigator organization may deliver training where it has the relevant expertise. That training is approved, priced, and reviewed the same way as any other provider's, and is billed separately from Learning Navigator fees. To ensure the Learning Navigator does not assess its own work:

- CVCF approves the Learning Navigator as a provider through the same process as any other trainer.
- CVCF receives complete evaluation results and de-identified participant feedback from all sessions, including those the Learning Navigator delivers, not only a summary.
- CVCF staff review evaluation results, including for sessions the Learning Navigator delivers, with attention to potential bias.
- CVCF conducts the annual performance review and may gather staff and board input directly for it.

CVCF staff lead

CVCF will designate a staff lead for Phase 2 to coordinate CVCF approvals, internal calendars, meeting space, invitations, and communications with staff and board; raise participant or internal concerns with the Learning Navigator; attend quarterly progress

reviews; and process the Learning Navigator's invoices. These tasks sit with CVCF, so proposers should not price them into the Learning Navigator fee.