



Request for Proposals

Strategic Plan Refresh, Department Work Plans,
and Performance Management

Issued: Tuesday, September 1, 2026

Proposals Due: Wednesday, September 16, 2026, at 5:00 P.M. Eastern Time

Description

The Town of Rolesville ("Town") seeks proposals from qualified consulting firms to assess progress under the 2024-2029 Strategic Plan and recommend limited updates for the plan's remaining term. The work includes internal engagement, department work plans, performance measures, and a public reporting framework. This is a refresh of the current plan, not development of a new strategic plan.

Background

Rolesville is a rapidly growing community in northeastern Wake County. Growth continues to increase service demands, capital and staffing needs, and public expectations. The Town wants to assess how well the current plan is being carried out and determine whether limited updates are needed through 2029.

The Board of Commissioners adopted the 2024-2029 Strategic Plan to guide policy and decision making. It includes the Town's vision, mission, values, and four focus areas: Connected Communities, Abundant Amenities, Intentional Growth, and Strong Organization. It also calls for annual department work plans and measures to track progress.

The Town also wants a stronger connection between Board priorities, department work, budgeting, capital planning, and performance reporting.

Project Objectives

Assess progress, implementation gaps, and barriers under the 2024-2029 Strategic Plan.

1. Recommend limited updates only where the assessment shows a need.
2. Strengthen alignment among the Strategic Plan, department work, budgeting, and capital planning.
3. Develop practical department work plans tied to Town-wide priorities.
4. Establish a practical performance measurement and public reporting framework that Town staff can maintain.
5. Provide simple templates and guidance for ongoing use by Town staff.

Scope of Services

Proposals should address the scope below. Firms may recommend a different approach or sequence if it would achieve the Town's objectives more efficiently.

1. Project Initiation & Management

Confirm project objectives, roles, schedule, key decisions, and deliverables with the Town project team.

- Provide a concise project plan and regular status updates throughout the engagement.

2. Current Strategic Plan Assessment

Review the 2024-2029 Strategic Plan and relevant Town work plans, budgets, capital plans, organizational information, and prior findings.

- Assess progress by focus area, including accomplishments, current work, gaps, barriers, and data limitations.
- Identify limited updates needed to improve implementation, accountability, timing, or alignment with Town resources and current conditions.

3. Internal Engagement

Lead a focused internal engagement process with the following groups:

- Mayor and Board of Commissioners: Use interviews, a workshop, or a retreat to assess progress, confirm priorities, and identify needed updates.
- Town leadership and employees: Use department and cross-department sessions to assess implementation, identify barriers, and inform work plans and performance measures.

4. Strategic Plan Refresh

Confirm whether the vision, mission, values, and focus areas remain appropriate. Recommend changes only when supported by the assessment and Town direction.

- Refine existing goals, initiatives, outcomes, responsibilities, and timelines where needed. The current framework should remain in place unless the Town directs otherwise.
- Confirm practical measures, baselines, and targets for priority areas and identify major resource or implementation needs.
- Distinguish strategic priorities from routine department work and clarify responsibility for implementation through 2029.
- Prepare a concise assessment and refreshed 2024-2029 Strategic Plan for Board review and public use.

5. Department Work Plans

Work with Town departments to establish concise, consistent work plans that connect department priorities and responsibilities to the Strategic Plan. The plans should be practical for staff to maintain and update.

Work plans should identify key priorities and initiatives, responsibilities, timelines, resource considerations, and meaningful performance measures.

- Provide a standard work plan format and a simple annual update process. Firms should state their assumptions about the number and format of department sessions.

6. Performance Measures and Performance Management Framework

Develop a practical set of Town-wide and departmental performance measures tied to the Strategic Plan and department work plans. Measures should be meaningful, easy to understand, realistic for staff to maintain, and useful for management and public reporting.

- Recommend a manageable structure for defining, tracking, reviewing, and updating measures, including which measures are best suited for public reporting and which are more useful for internal management.
- Provide practical guidance on measure ownership, reporting frequency, baselines, and targets without creating an unnecessarily complex system.
- Provide practical tools and training so Town staff can maintain the performance framework after the project ends.

7. Public Performance Reporting

Develop a practical public reporting framework that shows progress toward the Town's strategic priorities and selected service outcomes.

Recommend the measures, organization, reporting frequency, responsibilities, and content needed for ongoing public reporting.

- Design the reporting architecture and provide enough guidance for future implementation. Procurement, configuration, or construction of a software platform is not part of this scope.

8. Implementation, Training and Sustainability

Provide an implementation approach that connects the refreshed Strategic Plan, department work plans, performance measures, budgeting, capital planning, and public reporting.

- Provide practical templates, guidance, and training that Town staff can use to monitor progress and complete future updates.
- Present the final assessment and recommendations to Town leadership and conduct a transition session with designated staff.
- Firms may separately price optional post-project implementation support.

Required Deliverables

Strategic Plan implementation assessment with recommended updates.

- Draft and finalize refreshed 2024-2029 Strategic Plan, if changes are recommended, and a Board presentation.
- Standard department work plan format and initial department work plans developed through the engagement.
- Recommended Town-wide and departmental performance measures and a practical public reporting framework, including the reporting architecture. Software procurement, configuration, and construction are not required.
- Implementation guidance, templates, and staff training.
- Editable source files for final work products.

Town Responsibilities

- Designate a project manager and internal project team.
- Provide available plans, data, budgets, reports, organizational information, and other relevant documents.
- Coordinate access to elected officials, employees, facilities, and relevant Town records.
- Provide timely review and consolidated feedback on draft materials.
- Support meeting logistics and internal communications as mutually agreed during contract negotiations.

Proposal Format and Submission Requirements

Proposals must be complete, clear, and organized in the order below. The main response may not exceed fifteen (15) single-sided pages, excluding the cover, table of contents, resumes, references, required forms, and work samples. The Town may reject proposals that do not substantially follow these requirements.

Letter of Intent to include:

- Signature of an officer authorized to bind the firm.
- Firm name, address, telephone number, and website.
- Name, title, email address, and telephone number of the primary contact.
- Brief statement showing the firm's understanding of the assignment and commitment to the proposed schedule.
- Statement that the submission will remain valid for at least 120 days after the due date.

Company Background to include:

- Year established, ownership, office locations, number of employees, and primary services.
- Experience with municipal strategic plan assessments or refreshes, department work planning, performance measurement, and public reporting architecture.
- Identification of the office and staff who will perform the work.
- Disclosure of any actual or potential conflicts of interest.

Project Team

- Project organization chart naming the project manager and key staff.

- Responsibilities, relevant experience, availability, and expected level of effort for each key team member.
- Identification and qualifications of all subconsultants.
- Commitment that key personnel will not be replaced without Town approval.

Relevant Experience and Work Samples

- At least three comparable local government projects, preferably involving strategic plan assessments, refreshes, implementation, department work planning, performance measurement, or public reporting.
- Relevant examples of department work plans, performance measures, or public reporting frameworks may be included as work samples and do not count toward the page limit.
- For each project, identify the client, scope, completion date, results, and the firm's role.
- Provide links or appendices to representative work samples that best demonstrate experience relevant to this RFP.

Project Approach and Methodology

- Describe the proposed approach to the scope of work and how the firm will complete the project within the Town's timeframe and capacity.
- Explain how the approach will fit the Town's capacity and remain practical to maintain.
- Describe project management and how the firm will address differing internal perspectives or needed decisions.

Project Schedule and Capacity

- Proposed schedule showing tasks, milestones, decisions, deliverables, and Town review periods.
- Current workload and demonstrated capacity to meet the proposed schedule.
- Assumptions regarding the number and format of meetings, workshops, and department sessions.

Cost Proposal

- Provide a not-to-exceed fee for the full scope, summarized by major phase or deliverable. Clearly identify assumptions, optional services, and reimbursable costs.
- Provide separate pricing for any optional post-project implementation support.

References

- At least three local government references for similar work. Include the client, contact name and title, email, telephone number, project description, and completion date.

Anticipated Project Timeline

The Town expects the core work to be completed within approximately 12 weeks of contract execution. Firms should identify any assumptions or adjustments needed to meet this schedule.

Submit questions in writing to the Point of Contact below. Questions sent to other Town officials or employees may not receive a response. Responses and addenda will be posted on the Town's Bid Opportunities webpage.

Submit one electronic PDF by email or through the method listed in the final advertisement. The Town must receive the complete submission by the deadline. Late submissions will not be considered.

Point of Contact:

Steven Pearson
 Assistant Town Manager
 Town of Rolesville
 502 Southtown Circle | P.O. Box 250
 Rolesville, NC 27571
 spearson@rolesvillenc.gov | (919) 556-3506

Contract Terms & General Requirements

- This solicitation and any resulting contract shall be governed by the laws of the State of North Carolina.
- The Town may reject any or all submissions, waive informalities when allowed by law, cancel or change the procurement, request more information, and award a contract without further discussion.
- This RFP does not require the Town to award a contract or reimburse costs related to preparing a proposal, attending an interview, or negotiating a contract.
- Submissions become Town property and are subject to North Carolina public records law. Any claimed confidential or proprietary material must be clearly marked and supported by law. The Town cannot guarantee confidentiality.
- Upon payment, all project work products, data, reports, templates, and editable files will become Town property, subject to negotiated rights for the consultant's pre-existing tools and materials.
- Before work begins, the selected firm must provide proof of insurance in amounts set by the Town.
- The selected firm must follow applicable federal, state, and local laws, equal opportunity requirements, and Town policies.
- Work in future fiscal years depends on funding appropriated by the Board of Commissioners.
- The Town may end the contract for convenience or cause under the final agreement.
- Key staff or subconsultants named in the selected submission may not be replaced without the Town's written approval.
- The selected firm must disclose actual or potential conflicts of interest and remain objective and independent.
- Town addenda become part of this RFP and must be acknowledged in the proposal.