



REQUEST FOR PROPOSAL (RFP)
CALIFORNIA PRUNE BOARD FIVE-YEAR STRATEGIC ROADMAP & IMPLEMENTATION FRAMEWORK

Posted: August 14, 2026

ORGANIZATION BACKGROUND

The [California Prune Board](#) (CPB), is a State of California Marketing Order that represents California prune growers and processors by investing industry assessment dollars and other revenue sources in activities that strengthen the long-term success of the industry through marketing, nutrition research, production research, trade policy, and industry communications.

The Executive Committee has established the Board's mission, vision, purpose, and strategic priorities, which will serve as the foundation for this engagement. The selected strategic planning advisor may recommend refinements to improve clarity or implementation, but the intent is to build upon—not recreate—the Board's strategic direction.

PROJECT PURPOSE

CPB seeks proposals from qualified strategic planning advisors to facilitate the development of a Five-Year Strategic Roadmap and Implementation Framework that translates the Board's strategic priorities into a practical framework for implementation, measurement, governance, and continuous improvement.

The selected advisor will work collaboratively with staff to refine strategic objectives, identify priorities and measurable outcomes, establish ownership and accountability, and develop a roadmap that can guide execution over the next five years. CPB welcomes recommendations on how best to structure the planning process, provided the proposed approach supports the objectives and governance outlined in this RFP.

PROJECT OBJECTIVES

Working collaboratively with CPB staff, the selected advisor will support a process that enables the organization to:

- Refine each Board strategic priority to include clearly defined strategic objectives that articulate the intended industry outcome.
- Identify the strategic initiatives needed to achieve each objective.
- Develop measurable outcomes, key performance indicators, and SMART goals.
- Recommend ownership, timelines, governance, and resource considerations to support implementation.
- Recommend tools, frameworks, or processes that support review and adaptation of the Strategic Roadmap over time.

PROJECT PRINCIPLES

Strategic planning advisors should design the process to:

- Engage staff in a collaborative planning process that strengthens industry alignment and confidence among California prune growers and processors.

- Focus recommendations on creating measurable value for California prune growers and processors through effective stewardship of assessment investments.
- Clearly distinguish:
 - what CPB controls,
 - what CPB can influence, and
 - what falls outside CPB's mission.
- Include mechanisms that allow the roadmap to adapt as industry conditions change.

SCOPE OF WORK

CPB anticipates this engagement will include, but not necessarily be limited to, the components outlined below.

Project Design

The selected advisor will work with CPB staff to:

- Understand the organization's strategic priorities, governance structure, and desired outcomes.
- Recommend an overall planning approach, workplan, and project timeline.
- Identify pre-work, planning tools, and facilitation methods that will support the process.

Planning & Preparation

The selected advisor will recommend an approach for preparing staff and building momentum prior to the strategic planning offsite. This may include:

- Staff planning sessions
- Pre-work or assessments
- Discussion guides or facilitated exercises
- Identification of key themes, opportunities, questions, or issues to be addressed during the planning process

CPB anticipates holding several staff planning sessions prior to the offsite but welcomes recommendations regarding the number, format, and timing of these meetings.

Strategic Planning Offsite

The successful advisor will facilitate a strategic planning offsite (timing and length TBD based on schedules and budget) that advances the development of CPB's Strategic Roadmap and Implementation Framework. The offsite should establish the foundation for:

- Strategic objectives
- Strategic initiatives
- Desired outcomes, performance measures, and SMART goals
- Implementation priorities, ownership, and accountability
- Resource considerations
- Decision points, assumptions, and implementation risks

Roadmap Development

Following the offsite, the selected advisor will synthesize outcomes into a draft Strategic Roadmap and Implementation Framework and recommend any additional refinement, tools, documentation, or processes needed to support implementation, monitoring, and adaptation before committee review.

EXPECTED DELIVERABLES

At a minimum, proposals should address delivery of:

- Planning approach and workplan
- Staff preparation materials (as applicable)

- Facilitation of planning sessions and offsite
- Strategic objectives
- Draft roadmap
- Final roadmap
- Supporting implementation recommendations

Respondents are encouraged to recommend additional deliverables they believe would strengthen the planning process.

DESIRED QUALIFICATIONS

The selected advisor will demonstrate experience in:

- Strategic planning facilitation
- Organizational development
- Governance and board processes
- Strategic implementation planning
- Facilitation of executive leadership teams
- Building measurable implementation frameworks
- Working with agricultural organizations, commodity boards, trade associations, or nonprofit organizations (preferred)

AVAILABLE BUDGET

CPB anticipates a professional services budget of approximately \$20,000 for this engagement, exclusive of approved travel expenses.

PROPOSAL REQUIREMENTS

Respondents should include:

Understanding of the Engagement

- Your understanding of the opportunity.
- Any observations or recommendations.
- The greatest challenge you anticipate.
- How your approach addresses that challenge.

Deliverables

Identify all proposed deliverables.

Project Team

Identify the advisor(s) assigned to the project and their roles.

Relevant Experience

Provide examples of similar strategic planning or implementation planning projects.

References

Provide three client references for comparable engagements.

Cost Proposal

Please provide:

- Pricing for the base scope described in this RFP.
- A breakdown of professional fees (fixed fee and/or hourly rates, as applicable).

- Estimated travel and other reimbursable expenses.
- Any assumptions that may affect the proposed cost.
- Pricing for any optional services or expanded scope that you believe would strengthen the planning process.

EVALUATION CRITERIA

Proposals will be evaluated based on the following selection criteria:

Criteria	Weight
Understanding of the project	20%
Proposed process and methodology	35%
Relevant Experience	20%
Ability to facilitate collaborative planning processes	15%
Cost and Value	10%

ANTICIPATED TIMELINE

Milestone	Target Date
RFP Issued	August 14
Questions Due	August 21
Proposal Deadline	August 27
Consultant Selected	August 31
Project Kick-off & Process Design	Late August- Early September
Staff Preparation & Planning Activities	September-October
Strategic Planning Offsite (anticipated)	October
Draft Roadmap for Review	November
Review & Refinement	November–February
Final Roadmap	March

Note: The timing, format, and sequence of planning activities are intended as a guide. Respondents are encouraged to recommend an alternative process if it better supports the project objectives.

SUBMISSION INSTRUCTIONS

Please submit proposals electronically in PDF format to:

Kiaran Locy

California Prune Board

Email: klocy@californiaprunes.org

Subject Line: 5-Year Strategic Roadmap & Implementation Framework

Disclaimer: The California Prune Board reserves the right to modify or withdraw this RFP at any time, and to accept or reject any or all proposals in whole or in part. CPB is not responsible for any costs incurred by the submitting respondent in connection with this RFP.