

PARTNERS FOR HOME

Request for Proposals Board Retreat Design and Facilitation Services

**Partners for HOME
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INTRODUCTION

Partners for HOME (PfH), on behalf of the Atlanta Continuum of Care (CoC), is seeking proposals from qualified respondents to design and facilitate a high-level board retreat for its governing body. The purpose of this engagement is to support strategic alignment, strengthen governance practices, and facilitate meaningful dialogue among board members and executive leadership. The retreat will focus on clarifying priorities, enhancing board effectiveness, and establishing actionable next steps.

Partners for HOME (PfH) is a nonprofit organization that serves as the Collaborative Applicant for the Atlanta CoC, a U.S. Department of Housing and Urban Development (HUD) program that supports communitywide efforts to prevent and end homelessness. PfH coordinates funding and programs that assist nonprofit providers and local governments in rapidly rehousing individuals and families experiencing homelessness in the City of Atlanta.

PfH is seeking an applicant with experience in nonprofit governance, strategic planning, and executive-level facilitation. The selected facilitator will serve as a neutral third party and lead all aspects of the engagement, including discovery, stakeholder input, retreat design, facilitation, and post-retreat deliverables. This includes developing a customized agenda, guiding structured discussions, and ensuring sessions remain inclusive, well-managed, and outcome-focused.

The facilitator will incorporate governance best practices, support strategic prioritization, and utilize effective engagement methods across in-person, hybrid, or virtual formats. Deliverables will include retreat materials, summaries, and clear next steps, provided within agreed timelines.

Respondents must demonstrate the experience, staffing, and project management capacity to successfully execute this work and comply with all applicable business and insurance requirements. The selected facilitator will be evaluated based on the quality of facilitation, participant engagement, and the timely delivery of clear, actionable outcomes that support board alignment and strategic direction.

SUBMITTAL DEADLINE AND INQUIRIES

All responses to this RFP must be submitted electronically by **11:59 p.m. on Thursday, May 14, 2026**. **Responses after this time will not be considered.**

Responses must be in PDF format.

All questions regarding this RFP must be submitted in writing and received no later than **5:00 p.m. on Tuesday, May 12, 2026**. Responses to submitted questions will be shared with all respondents through the Partners for HOME website.

Please direct all inquiries and responses to Jasmine Rockwell Heard, Associate Director of Grants Management, at grants@partnersforhome.org.



COST PROPOSAL

Respondents must provide a proposed lump-sum amount for the requested services. **The total proposed cost must not exceed \$5,500.** Final costs may be negotiated after the selected respondent is identified. If fee negotiations with the respondent deemed most qualified are unsuccessful, or if the proposed costs exceed available project funding, PfH reserves the right to suspend negotiations and proceed to other respondents.

Respondents must also provide a summary of the assumptions used to determine the proposed cost, including, but not limited to, staffing structure, anticipated hours, key deliverables, and any resources or support required from PfH.

SCOPE OF SERVICES

Respondents must describe their proposed approach to delivering the retreat and respond to the following components:

1. **Discovery & Planning Process** – Describe how you will gather background information, understand organizational context, and assess retreat goals.
2. **Stakeholder Input** – Explain whether interviews, surveys, or listening sessions with board members and leadership will be conducted in advance.
3. **Retreat Design** – Outline your process for developing a customized retreat agenda tailored to board priorities and organizational needs.
4. **Facilitation Approach** – Describe methods used to encourage participation, manage time, navigate conflict, and keep discussions outcome-focused.
5. **Governance Content** – Explain how governance best practices, board roles, strategic oversight, or board development topics may be incorporated.
6. **Strategic Prioritization Exercises** – Describe tools or exercises used to help boards identify priorities, make decisions, and align around next steps.
7. **Engagement Methods** – Explain how you will keep participants engaged during in-person, hybrid, or virtual sessions.
8. **Deliverables** – Describe materials provided before and after the retreat (agenda, briefing materials, summaries, action plans, presentation decks, etc.).
9. **Timeline & Staffing Plan** – Provide anticipated timeline from award to retreat completion, including staff assigned to the project.
10. **Budget Proposal** – Provide a clear fee structure, including facilitation fees, preparation time, travel (if applicable), and optional add-on services.

PERFORMANCE MEASURES

The selected facilitator will be evaluated based on successful completion of the engagement and achievement of the following outcomes:

- Retreat agenda finalized by agreed-upon planning deadline.
- Pre-retreat stakeholder input completed and summarized, if applicable.
- Retreat conducted professionally and within scheduled timeframes.
- Board participation rate meets or exceeds agreed attendance targets.



- Participant satisfaction ratings indicate the retreat was valuable, engaging, and well-facilitated.
- Clear documentation of retreat outcomes, priorities, and next steps delivered within agreed timeframe after retreat.
- Board members report increased clarity regarding roles, priorities, and strategic direction.
- Leadership indicates the facilitator was responsive, organized, and effective throughout the engagement.
- Final deliverables accepted without substantial revision requests.

TERM

This is anticipated to be a three-month agreement, with a projected start date of June 1, 2026, and the board retreat scheduled for August 25, 2026.

APPLICATION

The application narrative should not exceed two pages, single-spaced, with one-inch margins and an 11-point or 12-point font.

The narrative should address the following (be specific):

- Summarize your expertise and ability to meet the requirements outlined within this RFP's Scope of Services.

In addition to the narrative, Respondents must submit:

- A separate cost proposal in PDF format based on the Scope of Services. The budget may be submitted in spreadsheet format. A brief budget narrative (not to exceed one page) may accompany the cost proposal and is not included in the two-page narrative limit.

EVALUATION METRICS

PfH will convene an evaluation committee to evaluate each proposal submitted by a Respondent. At the discretion of PfH, follow-up interviews may be conducted with the highest-ranking Respondents prior to the evaluation committee making a final selection.

TIMELINE AND DELIVERABLES

PfH will ensure that the selected Respondent has access to all necessary files, reports and personnel required to complete the Scope of Services. The following is an approximate project schedule, subject to modification:

Date	Action Required
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04/24/2026	Release of RFP
05/12/2026	Inquiries/questions due
As received	Responses to respondents' inquiries posted on PfH website
05/14/2026	RFP Responses Due
Week of 05/18/2026	Response review process
05/27/2026	Interviews with selected respondents* <i>if needed</i>
Week of 05/27/2026	Respondent selected

SELECTION PROCESS

Once the responses are reviewed, a shortlist will be compiled by PfH. Interviews may be conducted with the Respondent(s) determined to be the most qualified, and additional information may be required at that time. Negotiations will begin with the Respondent(s) selected to be the most suitable.

Selected Respondent(s) must be prepared to enter negotiations for services outlined in this RFP.

EVALUATION & ACCEPTANCE OF PROPOSALS

PfH reserves the right to reject any and all responses, to amend the Request for Proposals and the process itself, or to discontinue the process at any time.

TERMS AND CONDITIONS

All proposals and supporting materials as well as correspondence relating to this RFP become property of PfH when received. Any proprietary information contained in the Response should be so indicated. However, a general indication that the entire contents, or a major portion, of the proposal is proprietary will not be honored.

A. All applicable State of Georgia and federal laws, City and County ordinances, licenses, and regulations of all agencies having jurisdiction shall apply to the Respondent and project throughout and are incorporated herein. The contract with the selected Respondent, and all questions concerning the execution, validity or invalidity, capability of the parties, and the performance of the contract, shall be interpreted in all respects in accordance with the laws of the State of Georgia.

B. Professionals requiring special licenses must be licensed in the State of Georgia, and shall be responsible for those portions of the work as may be required by law.

C. Sub-Respondents as part of the Project team must be clearly identified in the Response, including roles, resumes of key personnel, and project references.

D. No Response shall be accepted from, and no contract will be awarded to, any person, Respondent, or corporation that (i) is in arrears to PfH, Invest Atlanta, or the City with respect to any debt, (ii) is in default with respect to any obligation to PfH, Invest Atlanta, or the City, or (iii) is deemed irresponsible or unreliable by PfH. If requested, the Respondent shall be required to submit satisfactory evidence that they have the necessary financial resources to provide the proposed services.

E. From the date PfH receives a Respondent's proposal through the date a contract is awarded to a Respondent(s), no Respondent may make substitutions, deletions, additions or other changes in the configuration of Respondent's proposal or members of Respondent's team.

Partners for HOME does not discriminate based on race, color, religion, gender, sexual orientation, national origin, age, or disabilities in hiring practices or service provision.