
ZEBULON

NORTH CAROLINA

**Request for Qualifications
Five-Year Strategic Plan Development
Services**

ZEBULON GOVERNMENT

For

**Town of Zebulon
North Carolina**

Due February 25, 2026

FIVE-YEAR STRATEGIC PLAN DEVELOPMENT SERVICE – TOWN OF ZEBULON

Table of Contents

SECTION	PAGE #
I. INTRODUCTION & PURPOSE	3
II. SUBMISSION REQUIREMENTS	5
III. PROJECT TIMELINE	6
IV. PROCUREMENT SCHEDULE	6
V. EVALUATION CRITERIA & SCORING RUBRIC	7
VI. FINALIST PRESENTAION FORMAT	7
VII. PLAN REVIEW & REFRESH	8
VIII. POINT OF CONTACT	9
IX. ADDITIONAL TERMS	9

I. INTRODUCTION & PURPOSE

1. OBJECTIVE:

The Town of Zebulon, North Carolina requests Statements of Qualifications from qualified firms to facilitate the development of a five-year Strategic Plan that will guide the Town's governance, fiscal decisions, operations, and community priorities.

Zebulon is the second fastest-growing municipality in Wake County and has experienced significant change since adoption of the Town's 2030 Strategic Plan in 2018. During that period, the Town's population grew from approximately 5,000 to more than 13,000 residents. Based on recent growth trends, Zebulon is anticipated to reach approximately 18,500 to 20,000 residents over the next five (5) years, with continued residential, commercial, and institutional growth.

Given this pace of change, the Town seeks an updated, focused, and implementable Strategic Plan that clearly articulates priorities for the next five years and serves as a practical management, accountability, and decision-making tool for elected officials, staff, and the community.

The current Strategic Plan, Zebulon 2030, was adopted as part of the 2018-19 budget. It identified three focus areas: Vibrant Downtown, Small Town Life, and Growing Smart. This will lay the foundation for the updated Strategic Plan which is envisioned to be adopted as part of the FY2027-28 Budget.

2. PLANNING CONTEXT:

The Strategic Plan will be developed in the context of the Town's current realities, including:

- Rapid population growth increasing service expectations
- Staff transitions and evolving organizational capacity
- Infrastructure pressures related to water, transportation, parks and recreational amenities, and schools
- The need to strengthen cross-department coordination
- Rising community expectations for transparency, consistency, and responsiveness
- The importance of balancing growth with small-town character
- Legal and policy considerations related to development, incentives, and defensible decision-making
- Revenue challenges in keeping pace with the cost of growth

The Strategic Plan must be designed to help the Town manage growth responsibility, strengthen internal capacity, and build trust with the community, while remaining realistic about staffing, systems, and resources.

3. PLANNING PHILOSOPHY:

The Strategic Plan shall be grounded in a shared understanding of priorities informed by:

- Direction from the Mayor and Board of Commissioners
- Operational insight and capacity from Town staff
- Meaningful input from residents, businesses, and community stakeholders

4. SCOPE OF SERVICES:

The selected consultant shall provide professional services that include, but are not limited to, the following components:

1. Stakeholder Engagement & Input

The consultant shall design and facilitate a structured engagement process that intentionally gathers, synthesizes, and reconciles input from three core stakeholder groups.

a. Mayor and Board of Commissioners

- Facilitate interviews, workshops, or retreats with elected officials
- Elicit priorities related to governance, growth management, service delivery, and community identity
- Ensure elected leadership priorities serve as the primary directional foundation of the Strategic Plan

b. Town Staff

- Engage Town leadership and staff across departments
- Assess organizational capacity, internal systems, and implementation constraints
- Ensure priorities are feasible and aligned with operational realities

c. Community & Business Stakeholders

- Design and implement an inclusive community engagement strategy reflective of
- Zebulon's demographics and growth patterns
- Engage residents, business owners, and community organizations
- Translate community input into themes that inform and refine strategic priorities

Proposals must clearly describe how input from these stakeholder groups will be gathered, synthesized, and reconciled into a cohesive five-year strategy.

2. Plan Review & Alignment

The consultant shall review and align the Strategic Plan with existing Town plans, including but not limited to:

- Zebulon 2030 Strategic Plan
- Grow Zebulon
- Comprehensive Plan
- Parks and Recreation Master Plan
- Economic Development Plan

The consultant shall identify areas of alignment, gaps, and opportunities for integration.

3. Strategic Priorities & Measurable Outcomes

The Strategic Plan shall include:

- a. A limited number of clearly articulated strategic priorities for the five-year period
For each priority:
 - Defined goals and intended outcomes

- Measurable performance indicators
- b. Identification of responsible parties (Town Manager, departments, partners)
- c. Implementation timelines (short-, mid-, and long-ter,)
- d. High-level resource considerations (operating, capital, staffing)

4. Implementation & Sequencing Framework

The consultant shall develop an implementation framework that:

- Translate strategic priorities into actionable initiatives
- Aligns the Strategic Plan with budgeting, capital planning, and departmental work plans
- Identifies and sequences future planning efforts and major initiatives necessary to support the Town's long-term success
- Considers organizational capacity, fiscal impacts, and timing
- Establishes expectations for monitoring, reporting, and periodic updates
- Establishes a criterion for evaluating new initiatives or requests that arise outside the Strategic Plan

5. Strategic Plan Communication & Usability

The consultant shall assist the Town in presenting the Strategic Plan in a clear, accessible, and usable format that supports communication with elected officials, staff, and the community.

This scope does not include development of a standalone branding or marketing campaign.

6. Consultant Qualifications

The Town seeks firms with demonstrated experience in:

- Municipal strategic planning (five-year horizon), preferable for communities experiencing rapid growth.
- Facilitating engagement with elected officials, staff, and communities
- Developing plans with measurable outcomes and implementation frameworks
- Supporting organizations navigating growth and organizational transition

II. SUBMISSION REQUIREMENTS

Provide five (5) bound copies OR one electronic copy in PDF format via email of your submittal. Submittals shall be a maximum of 12 pages (6 if double sided) and on 8.5" x 11" paper bound such that lay flat when opened. Font size shall be no less than 10 pt. The maximum page allowance does exclude a cover page or appendices. Fold out pages are not allowed. All copies, including electronic PDF's, must contain signatures of company representatives who are authorized to execute documents on behalf of the firm. Submittals must contain the following information:

Submissions must include the following in the order listed:

1. History of the firm
2. Corporate description and contact information
3. Relevant experience, including at least two municipal strategic plans for rapidly growing communities (please provide these plans). On these relevant plans, we require the bidder to be the prime consultant.

4. Project approach and methodology, including stakeholder engagement strategy
5. Project Team
6. Project timeline
7. Project budget

III. PROJECT TIMELINE

The Town anticipates completion of the Strategic Plan within twelve (12) months of project initiation.

The project is expected to:

- Kick off with a Board retreat, to occur no later than April 15, 2026, including engagement with the Mayor, Board of Commissioners, and Town department directors
- Include structured engagement with elected officials, staff, and the community
- Conclude with adoption of the Strategic Plan by the Board of Commissioners

IV. PROCUREMENT SCHEDULE

- RFP Issued: January 29
- Deadline for Questions: February 13, 2026
- Responses to Questions Posted: February 18, 2026 (via Town website)
- Proposals Due: February 25, 2026
- Finalist Presentations: No later than March 18, 2026
- Presentations may be conducted in person or virtually; in-person is preferred

V. EVALUATION CRITERIA & SCORING RUBRIC

Proposals will be evaluated using the following criteria (100 points total):

- Understanding of the Town and project objectives – 20 points
- Project approach and methodology – 25 points
- Stakeholder engagement strategy – 20 points
- Relevant experience and qualifications – 15 points
- Project schedule and capacity to meet timeline – 10 points
- Cost effectiveness – 5 points
- Finalist presentation – 5 points

VI. FINALIST PRESENTATION FORMAT

Total Time: 60 minutes

- Presentation: 30–40 minutes
- Q&A: 20–30 minutes
- Audience:

The presentation audience may include members of the Mayor and Board of Commissioners, Town department directors, and other Town staff, as determined by the Town.

VII. PLAN REVIEW & REFRESH

The Strategic Plan is intended to serve as a living framework for the Town. The Town anticipates conducting annual reviews of progress and periodic updates as needed.

Any future updates or refreshes may be conducted by Town staff or through a separate procurement process, at the Town's discretion.

VIII. POINT OF CONTACT

All communications regarding this RFP shall be directed to:

Nicole Crooms
Executive Assistant to the Town Manager
Town of Zebulon
Email: ncrooms@townofzebulon.org

Questions submitted to any other Town staff or officials may not be answered.

IX. ADDITIONAL TERMS

- Submission Method: Proposals must be submitted electronically in PDF format by the stated deadline. Late submissions will not be accepted.
- Public Records: All proposals are subject to public disclosure in accordance with North Carolina public records law.
- Right to Negotiate: The Town reserves the right to negotiate scope, deliverables, and fees with the selected firm prior to contract execution.
- Ownership of Work Product: All work products produced under this engagement shall become the property of the Town of Zebulon.
- Right to Reject: The Town reserves the right to reject any or all submissions or discontinue the procurement process.