REQUEST FOR PROPOSALS

PHASE I | Partnership for Children of Cumberland County and Robeson County Partnership for Children Pre-Merger Planning

Type of Consultants Sought:

The Partnership for Children of Cumberland County and Robeson County Partnership for Children are seeking proposals from qualified professionals or firms with experience providing nonprofit legal consultation and merger facilitation services, as outlined in the applicable Requests for Proposals (RFPs). The application period opens October 1, 2026, and closes on October 16, 2026.

Administrative dates and contacts

Procurement milestone	Date / detail
RFP issue date	10/1/2026
Optional bidder's meeting (date, time, access)	**10/5/2026**
Recording request contact	pfederline@ccpfc.org
Written questions deadline	**10/9/2026 to pfederline@ccpfc.org**
Written Q&A / addendum publication	10/11/2026
Proposal deadline (Eastern Time)	**10/16/2026 to mdowney@ccpfc.org**
Anticipated award	12/16/2026
Anticipated project start	1/11/2027

Key Contacts:

Partnership for Children of Cumberland County, Inc.		**910-867-9700**
President	Mary Sonnenberg	msonnenberg@ccpfc.org
Board Chair	Dr. Patricia Fecher	pfecher@methodist.edu
Contract Manager	Michelle Downey	mdowney@ccpfc.org
Robeson County Partnership for Children, Inc.		
President	Dr. Jessica Lowery Clark	jloweryclark@rcpartnership4children.org
Board Chair	Rhonda Dial	Rhonda.dial@dhhs.nc.gov
Contract & Finance Manager	Lindsay Mejia	lmejia@rcpartnership4children.org

Introduction

The Partnerships invite qualified consultants or firms to propose professional facilitation and organizational assessment services for Phase I of their Merger Three-Year Road Map. The organizations are exploring a potential unified regional nonprofit to strengthen services, organizational sustainability and community impact. This procurement concerns discovery and decision support only; neither Board has committed to a merger. *A description of these Partnerships and their connection to the NC Partnership for Children is provided in **Appendix A**.*

Background and boundaries

The Partnerships have undertaken preliminary merger exploration. Their broader draft scope anticipates 12–18 months of pre-merger planning from funding approval, with a preliminary overall pre-merger budget of $100,000, including $50,000 identified for consulting. These are contextual planning figures, not a Phase I contract ceiling. Phase I will have its own negotiated scope, schedule and price. Legal execution, financial audits, full HR/IT audits, transaction implementation and post-merger integration are excluded unless separately authorized.

Guiding principles

Independence; mission and continuity of services; meaningful representation of both counties and organizations; transparent communication; confidential and constructive stakeholder participation; and intentional design of a future culture rather than automatic adoption of either legacy culture.

1. Purpose and objectives

To explore and undertake as necessary pre-merger activities that will facilitate a successful and strategic merger between Partnership for Children of Cumberland County and Robeson County Partnership for Children (hereafter, the Partnerships). The goal is to create a unified nonprofit entity that strengthens services, improves efficiencies, and enhances community impact across both counties.

2. Objectives:

- Assess legal, financial, programmatic, and operational compatibility of both organizations.
- Engage key stakeholders from both Partnerships to gather input and build consensus.
- Identify risks, benefits, and challenges related to the potential merger.
- Develop a detailed merger plan, including governance structure, staffing, resource allocation, and program alignment.
- Produce a final recommendation report outlining the feasibility and proposed steps for the merger.

3. Scope of Work / Activities

3.1 Organizational assessment

- Review current organizational structures, governance, staffing, budgets, and programs of each Partnership.
- Examine current program reach, outcomes, implementation quality, and opportunities to strengthen or better coordinate services across the two Partnerships. That may include reviewing available program and community data, identifying duplication or unmet needs, and developing recommendations for how programs could be aligned, sustained, adapted, or enhanced through a combined structure.
- Conduct financial audits or reviews to identify fiscal health and liabilities.
- Analyze program overlaps, gaps, and opportunities for consolidation or enhancement.

3.2 Stakeholder engagement

- Design stakeholder engagement strategies to gather program-focused input from families, community partners, providers, and staff on service access, coordination, gaps, and priorities for children and families.
- Plan, schedule, and facilitate stakeholder meetings, focus groups, and/or interviews with board members, staff, families and clients, community partners, providers, and funders.
- Gather and document stakeholder perspectives on merger priorities, concerns, service access and coordination, identified gaps, and desired outcomes for children and families.
- Synthesize stakeholder feedback into actionable recommendations and proposed measures for assessing whether and how a future organizational structure strengthens service coordination, addresses identified gaps, and improves program outcomes.

3.3 Legal and Regulatory Review

- Consult with legal counsel to understand requirements, risks, and steps for merger compliance under North Carolina nonprofit law.
- Identify necessary filings, approvals, and documentation needed for merger execution.
- Provide requirements for Summary to the Attorney General as required by NC GS 55A-11-02 and 55A-12-02.

3.4. Financial Planning

- Develop combined budget projections, cost-saving opportunities, and funding strategies.
- Explore funding and resource-sharing options post-merger.

3.5. Merger Feasibility and Planning (*See Appendix B for Merger Legal Compliance*)

- Produce a comprehensive merger plan that includes:
- Proposed governance model and board composition
- Staffing and leadership integration plan
- Programmatic alignment strategy
- Community engagement and communication strategy

3.6. Reporting and Recommendations

- Present findings, plans, and recommendations to the Boards of both Partnerships.
- Prepare a final report summarizing the results of the pre-merger planning and recommended next steps.

4. Timeline

- Estimated duration of pre-merger work: 12-18 months (depending on funder requirements) from funding approval.
- Key milestones:
    - Organizational assessments and stakeholder engagement
    - Legal and financial reviews
    - Draft merger plan development and review
    - Final report and board presentations

5. Expected Outcomes (Deliverables)

- A well-informed decision-making process regarding the merger.
- A clear and actionable merger plan ready for implementation if approved.
- Strengthened collaboration and communication between the two Partnerships.

6. Budget

A sample/draft budget is provided below. Exact expenses are unknown at this time.

Consultant	$50,000
Legal	$5,000
Communications	$10,000
Human Resource Projects	$10,000
Community Engagement Projects	$10,000
Financial Due Diligence	$5,000
Technology Assessment	$5,000
Meeting Expenses	$5,000
Total	$100,000

Leadership expects there will be an additional funds needed after the proposed merger for ongoing consultant and human resource work in regards to workplace culture, and board development and engagement.

7. Consultant qualifications

- Cite and document experience with nonprofit merger, alliance, or strategic restructuring engagements
- Cultural due diligence, organizational assessment and change-management expertise
- Board and executive facilitation, including disagreement and sensitive stakeholder engagement
- Experience with governance, multi-county organizations and publicly funded nonprofits where available
- Capacity to provide independent analysis and protect confidential data

8. Proposal contents

- Executive summary and understanding of Phase I
- Firm and/or Lead Facilitator Qualifications, team roles and expected engagements
- Methodology for assessment, culture, engagement safeguards, confidentiality, and decision support
- Detailed work plan, schedule, milestones and deliverable acceptance process
- Timeline and staffing
- At least three comparable engagements and three professional references
- Conflict-of-interest disclosure
- Detailed cost proposal and separately priced options
    - Itemized fixed or not-to-exceed fee, assumptions, staff hours/rates, travel, assessment and reimbursable costs
    - Separately priced optional services and identification of specialist services to procure independently or by subcontract

9. Optional bidder's meeting

A **NON-MANDATORY** virtual pre-proposal bidders conference will be held on **October 5, 2026 at 1:00 pm**. **Registration is required via this link**: https://us02web.zoom.us/meeting/register/O_EYPqQFRcGHTYXY-OEMFQ#/registration

Attendance is not required and will not affect eligibility or evaluation. An informational recording will be available upon request from Pamela Federline, pfederline@ccpfc.org. Viewing the recording is also optional. Prospective bidders may submit written questions **by Friday, October 9, 2026**. Substantive oral questions and answers will be incorporated into a consolidated written Q&A or addendum available to all prospective bidders via email by **Monday, October 11, 2026**. Only written addenda may change RFP requirements. The recording is informational and does not supersede written addenda.

10. Questions and Submission

Send questions to **Pamela Federline, Vice President of Planning and Evaluation**, by **Friday, October 9, 2026**.

Deadline: Submit one PDF proposal by **Friday, October 16, 2026 EST by 5:00** pm to:

Michelle Downey – mdowney@ccpfc.org

Subject: "Phase I Merger Discovery RFP — [**RESPONDENT NAME**]"

The Partnerships may seek clarifications and will interview finalist applicants. All changes to the solicitation will be issued in writing.

11. Contract and procurement terms

The Partnerships reserve the right, subject to applicable procurement and funding requirements, to reject proposals, cancel or amend the solicitation, request clarification, negotiate terms and decline award. Proposal preparation costs are borne by bidders. The agreement will establish final scope, milestones, compensation, confidentiality, data security, insurance if applicable, termination, and ownership/licensing of deliverables and proprietary assessment tools.

12. Confidentiality and work product

The consultant will protect confidential personnel, financial, organizational and stakeholder information; specify storage, access, retention and disposal practices; and report small-group findings without compromising anonymity. Final contracted reports and custom deliverables will be supplied to both Partnerships in accessible, editable electronic formats, subject to negotiated rights in pre-existing proprietary tools.

Appendix A — About the Partnership for Children Contractors

In 1993, North Carolina Governor Jim Hunt founded **Smart Start**, North Carolina's nationally recognized and award-winning early childhood initiative. It was designed to ensure that ALL young children, 0-5, enter school healthy and ready to succeed.

Smart Start is a public-private initiative that provides early education funding to all of the state's 100 counties. Smart Start funds are administered at the local level through local nonprofit organizations such as the Partnership for Children of Cumberland County, Inc. and the Robeson County Partnership for Children, Inc. Services offered reflect documented community needs.

The North Carolina Partnership for Children, Inc. (NCPC) is the statewide nonprofit organization that provides oversight and technical assistance for local partnerships. Services at the local level range depending on local needs. Currently, **75** local partnerships are established throughout the state to administer funding and programs. Smart Start funds are used to improve the quality of child care, make child care more affordable and accessible, provide access to health services, and offer family support. Smart Start has achieved tremendous results in these areas and continues to strive to reach all children in North Carolina.

Each partner provides funding to Direct Service Providers (DSPs), internally or externally in the community, to meet the needs of early child care professionals and child care sites, as well children before birth through five years of age (before entering kindergarten).

The Partnerships involved in this Request for Proposal have worked steadfastly through a lengthy discernment process involving the Presidents and Board Chairs, through Board approval, to move ahead with a planned merger. The merger will bring together two strong organizations with a goal of continuing to meet the unique needs of their respective counties, while consolidating appropriate administrative and programmatic areas to create efficiency and long-term sustainability.

Appendix B — Merger Legal Compliance

Merger Legal Compliance

In North Carolina, nonprofit organizations must follow specific legal steps to complete a merger, ensuring compliance with state laws and protecting stakeholder interests. Below is an overview of those key steps:

1. Review Governing Documents

- Examine the articles of incorporation and bylaws of both nonprofits for any provisions relating to mergers.

2. Board Approval

- Both organizations' boards of directors must approve the proposed merger plan. This typically involves:
- Reviewing and agreeing on the terms of the merger agreement.
- Approving any amendments to the articles of incorporation that the merger requires.

3. Prepare a Plan of Merger

- Draft a formal plan of merger that details:
- The terms and conditions of the merger.
- Any changes to the surviving entity's governing documents.
- The manner of converting membership or ownership interests, if applicable.

4. Member Approval (if applicable)

- If the nonprofit has members with voting rights, the merger plan must be submitted for approval by the members following the rules laid out in the bylaws and state law.

5. Follow NC General Statutes – Chapter 55A Article 11

- Manage the process of obtaining prior approval of the Attorney General directly, or file in Superior Court in a proceeding in which the Attorney General has been given written notice as required by NC GS 55A-11-02 and 55A-12-02 at least 30 days before completing the merger. This step is mandatory prior to filing Articles of Merger with the NC Secretary of State.

6. File Articles of Merger with the North Carolina Secretary of State

- Submit the Articles of Merger form along with any required fees. This document legally combines the two entities into one under state law. The filing must include:
- Names of the merging organizations.
- The surviving entity's name (which might be one of the existing entities or a new name).
- Effective date of the merger (immediate or delayed).
- The North Carolina Secretary of State provides the required forms and instructions.

7. Update IRS and Other Registrations

- Notify the IRS and apply for recognition of the new or surviving entity's tax-exempt status if needed.
- Update registrations with state tax authorities, charitable solicitation registrations, and other relevant agencies.

8. Notify Stakeholders and Update Contracts

- Inform funders, partners, clients, and other stakeholders about the merger.
- Review and update contracts, leases, permits, and other legal agreements to reflect the new entity.

9. Compliance with Charitable Solicitation Laws

- Update or re-register charitable solicitation authority if the merger changes the organization's structure or name.

Appendix C — Proposal Checklist

Phase I proposal outline

- ○ Executive summary and understanding of Phase I
- ○ Firm and/or Lead Facilitator Qualifications, team roles and expected engagements
- ○ Methodology for assessment, culture, engagement safeguards, confidentiality, and decision support
- ○ Detailed work plan, schedule, milestones and deliverable acceptance process
- ○ Timeline and staffing
- ○ At least three comparable engagements and three professional references
- ○ Conflict-of-interest disclosure
- ○ Detailed cost proposal and separately priced options
    - ○ Itemized fixed or not-to-exceed fee, assumptions, staff hours/rates, travel, assessment and reimbursable costs
    - ○ Separately priced optional services and identification of specialist services to procure independently or by subcontract

Phase I deliverable checklist

- ○ Work plan and document request
    - ○ Inclusion of Specialty items such as Secretary of State and Attorney General filings
- ○ Stakeholder engagement and confidentiality plan
- ○ Cultural and organizational assessment
- ○ Baseline culture instrument and results
- ○ Compatibility assessment and critical issues
- ○ Risk/mitigation and specialist review needs
- ○ Draft and final reports
- ○ Presentations to both Boards

Appendix D — Optional Bidder's Meeting Agenda

Segment	Suggested content
Welcome and procurement rules	Non-mandatory attendance; equal access; written addenda control
Background	Two Partnerships and Phase I decision-support purpose
Scope	Discovery, cultural due diligence, stakeholder engagement, readiness
Deliverables	Board-ready findings and decision gate
Proposal instructions	Timeline, format, evaluation and pricing
Questions	Collect questions; publish consolidated written answers

Appendix E – Proposal Evaluation Criteria

Criterion	Weight
Relevant nonprofit merger/restructuring experience	20%
Cultural due diligence and organizational development	20%
Methodology and understanding of Phase I	20%
Facilitation and stakeholder engagement	15%
Team qualifications	10%
Work plan and feasibility	5%
References and comparable results	5%
Cost and overall value	5%
TOTAL	100%

Evaluation weights are proposed and may change. The Partnerships may interview finalists and consider responsiveness, demonstrated experience, price and overall value.