REQUEST FOR PROPOSALS:

Strategic Planning Consultant

RFP Posting Date: 10/2/2026
Proposals Due: 11/18/2026

About United Way of Addison County

United Way of Addison County (UWAC) is a nonprofit community organization serving Addison County, Vermont. We work to mobilize people and resources to improve lives and strengthen our community, with a particular focus on bringing people and organizations together around complex community challenges.

UWAC plays a unique role in our region as a funder, convener, facilitator, and community partner. Our work includes community impact funding, substance use prevention and coalition leadership, community initiatives, resource development, and partnerships with nonprofit, public, healthcare, education, and other community organizations.

UWAC is fortunate to have a highly engaged and collaborative Board of Directors and staff team. We value thoughtful conversation, strong relationships, curiosity, transparency, and shared ownership of our work.

The Opportunity

UWAC is seeking an experienced strategic planning consultant to guide the organization through the development of its next strategic plan.

We are not looking for a consultant to simply produce a plan *for* us. We are seeking a partner who can design and facilitate a collaborative process that helps our Board and staff think expansively about UWAC's future, make thoughtful strategic choices, and build shared ownership of the resulting direction.

This planning process comes at an important moment for UWAC. The organization is financially strong, deeply connected to the community, and increasingly positioned to serve as a convener and backbone organization around significant regional issues. At the same time, the nonprofit and funding environments are changing, community needs remain significant, and opportunities

exist to consider how UWAC's role, reach, partnerships, and priorities should evolve in the years ahead.

Scope of Work

We anticipate working collaboratively with the selected consultant to refine the exact process. At a minimum, we expect the engagement to include:

- Review of relevant organizational materials and existing data;
- Development of a clear and manageable strategic planning process and timeline;
- Individual or small-group interviews with key internal and external stakeholders, including Board members, staff, community partners, donors, and/or other community leaders;
- Strong facilitation of Board and staff conversations, including at least one significant strategic planning session or retreat;
- Identification and synthesis of themes, opportunities, challenges, and strategic choices emerging from the process;
- Facilitation of decision-making around a limited number of meaningful organizational priorities; and
- Development of a concise, high-level strategic plan that identifies key priorities, goals, and milestones and provides clear direction for Board and staff decision-making over the next several years. Detailed implementation planning including specific action steps, responsibilities, and timelines will be developed by UWAC staff following completion of the strategic plan.

We are open to recommendations about methodology and do not have a predetermined strategic planning model that must be used.

What We Are Looking For

The successful consultant will bring exceptional facilitation skills and demonstrated experience helping groups engage in meaningful strategic conversation and reach shared decisions.

Of particular importance to UWAC are:

- A highly collaborative and engaging approach;
- Excellent group facilitation skills, particularly with Boards and leadership teams;
- Experience conducting stakeholder interviews and translating qualitative input into useful themes and insights;
- The ability to ask thoughtful, challenging questions while working well with an organization that values relationships and consensus;
- Demonstrated experience working with nonprofit organizations and an understanding of the unique strategic considerations of the sector, including resource development and fundraising, diversified funding, governance, community accountability, partnerships, and organizational sustainability

- An ability to distinguish true strategic priorities from an overly broad organizational "to-do" list; and
- A practical approach that results in a plan people will actually use.

Familiarity with Vermont and/or rural communities is welcome but not required.

Budget and Timeline

UWAC anticipates a total project budget of **$10,000–$15,000**, inclusive of consultant fees and expenses.

We expect the strategic planning process to take place during the winter/spring of 2026/2027. We are interested in hearing consultants' recommendations regarding the appropriate length and sequencing of the process.

Proposal Requirements

Please submit a brief proposal that includes:

1. Your understanding of this engagement and proposed approach;
2. A description of your strategic planning and facilitation experience, particularly with nonprofit organizations;
3. Examples of similar work and two references;
4. A proposed project timeline;
5. Your proposed fee and any anticipated expenses; and
6. A brief description of the final deliverables you recommend.

We value substance over length. Proposals do not need to be elaborate.

Submission and Selection

Please submit proposals electronically to Helena Van Voorst, Executive Director, by November 16, 2026: helena@unitedwayaddisoncounty.org

Selected consultants may be invited to have a brief conversation with representatives of UWAC's Board and staff. In selecting a consultant, UWAC will consider relevant experience, facilitation approach, demonstrated ability to lead collaborative processes, proposed methodology, references, and overall value.

Questions may be directed to Helena at helena@unitedwayaddisoncounty.org