



## PURPOSE

The Unitarian Universalist Women's Federation (UUWF) has initiated a Request for Proposal (RFP) process to identify a vendor qualified to design and execute a strategic visioning and comprehensive planning process.

## WHO MAY RESPOND

UUWF requires a vendor who has demonstrated experience in successfully developing consensus-based strategic plans, is knowledgeable in collective impact or collaborative strategic initiatives, has strong facilitation skills, and has completed extensive work with non-profit strategic planning.

## ABOUT THE ORGANIZATION

UUWF is a national membership organization working to advance justice for women and girls, and to promote their spiritual growth. We are an independent non-profit, 501c3 corporation and one of only two associate member organizations of the Unitarian Universalist Association.

Inheritor of a proud tradition, UUWF was formed in 1963 through consolidation of the Association of Universalist Women (founded in 1869 and believed to be the first organization of lay church women in the United States) and the Alliance of Unitarian Women (1890).

We carry out three major funding programs:

- Marjorie Bowens-Wheatley Scholarship program gives modest scholarships to aspirants/candidates for UU ministry or religious education or music leadership credentialing programs, who identify as women of color, Latina, or Hispanic.
- Margaret Fuller grants provide funding for scholarly projects that reflect prophetic and innovative explorations of religious feminisms.
- Equity and Justice grants fund innovative UU projects that effect positive social change for women and girls in the US.

We are committed to presenting engaging and empowering workshops and programs at the UUA's annual General Assembly. Over the years we've sponsored several key publications, including *Voices of the New Feminism* in the 1970s, *Cakes for the Queen of Heaven* in the 1980s and again in 2007, and *Rise Up and Call Her Name* in the 1990s. We're currently working with Meadville-Lombard Theological School in Chicago to create and maintain UU women's history archives in their HEResies Collection.

We maintain three award programs:

- Ministry to Women Award
- Annual Sermon Award
- Clara Barton Sisterhood, through which local congregations, individuals, or women's groups can honor women aged 80 or older for their contributions to church and community life.

## **PROJECT OVERVIEW**

The UUWF is at an interesting point in its organizational development. We have undergone a number of board and staff changes recently. We are in a time of transition within our board, moving from a task-oriented board to a more visionary and leadership focus. As such, we are considering hiring an Executive Director. Additionally, we are examining our outward focus – seeking to more cohesively and intersectionally address the spiritual growth of women-identified people.

The organization is looking for a consultant to work with UUWF to create a three-year strategic plan through a comprehensive, data-driven, and participatory process. The work will take place between July 1 and October 31, 2019.

## **SCOPE OF WORK AND DELIVERABLES**

We expect the project to include the following:

- Project management
- Design and execution of a strategic visioning and comprehensive planning process
- Develop an actionable three-year strategic plan, including a projected budget for its implementation
- Develop recommendations regarding the plan's implementation and support structure

It is expected that these tasks will be accomplished through a combination of activities, including:

- Background research by consultant on UUWF history and current leadership team, including environmental scan of organization and opportunities ahead.
- Benchmarking UUWF organization with other similar sized non-profits or additional organizations with similar focus.
- Focus groups, interviews, surveys and/or any other method that will be useful in receiving partner and community input. We are seeking an internal and external survey of the organization's mission, structure, programs, and goals.
- Facilitated group meetings with board, staff and partners to create consensus regarding a strategic vision and plan, including successful implementation.
- These meetings will typically be conducted virtually. The UUWF board has an in-person meeting on the east coast in late fall, with the consultant may be invited to attend.
- Review and present available data and strategic plans as well as any relevant research and best-practices relating to the work UUWF accomplishes

While the UUWF understands that completing this project requires significant and active Board and staff involvement, it is important to note that the applicant selected will be responsible for completing and writing all project work products and final deliverables. The staff will not be expected to be involved in these deliverables.

The UUWF will be responsible for implementing the recommendations from all final deliverables; however, it is expected that the consultant selected may provide the organization with ongoing coaching and implementation support as needed, per the final letter of agreement.

## **PROJECT GOALS AND TARGET AUDIENCE**

While the UUWF seeks the consultant's recommendations regarding the best process to develop an actionable strategic plan, the organization envisions the scope of work being completed in stages. The consultant will serve as the facilitator for this process, with leadership from the UUWF board and staff.

### **Stage 1. Discovery - Vision and key goals with UUWF Board**

This stage includes consensus building among the UUWF partners to discover a shared strategic vision that:

- is clearly stated
- is compelling and is timely, describing a clear and present need
- motivates people to act
- is a worthwhile challenge and
- is audacious.

### **Stage 2. Research and Validation - Needs assessment, gap analysis, SWOT analysis, research, etc.**

This stage should produce the substantive documentation and solutions needed for validation of discovered vision and key goals and inform the strategic planning process.

### **Stage 3. Identify strategic goals and write the strategic plan, including detailed budget**

After the discovery and research phase, stage 3 entails the identification of four to seven key RCAP strategic goals and the development of an actionable strategic plan that will serve as the overall blueprint for UUWF's work. This plan should include an Executive Summary and a comprehensive, detailed plan that identifies:

- Shared vision
- Goals
- Objectives
- Strategies
- Tactics
- Responsible Partners and their Roles
- Measures
- Outcomes

### **Stage 4. Development of implementation recommendations**

This stage includes the development of recommendations regarding the implementation phase of the UUWF's work. Included within this phase should be recommendations regarding a detailed budget to implement the plan and infrastructure (e.g., backbone organization, staffing, etc.) needed to support the Initiative's implementation phase.

## **OWNERSHIP AND CONFIDENTIALITY**

All intellectual property will become the property of the UUWF. All data remains the sole property of the UUWF. The vendor shall further agree to keep information related to any and all contracts with the UUWF in strict confidence, including, but not limited to, the terms of the contract(s) and any confidential business information or proprietary information learned through its dealings with the UUWF.

## **PROPOSAL FORMAT**

To best evaluate the ability of the vendor to meet our goals, please include the following in your proposal:

- Your approach to strategic planning. A summary of your experience at successfully developing consensus-based strategic plans and inspiring others to think innovatively.
- Examples of similarly-complex projects, including a sample project plan and three specific client references.
- Your knowledge of Universalist Unitarianism and the UUWF and/or UUA structures and history.
- Suggested project timeline with major tasks and milestones. Describe your understanding of the work to be performed, estimated hours, and other pertinent information.
- Identify who will be involved on your project team, their role, and including their relevant experience. Vendor is not able to sub-contract out any of the work without the pre-approval of the sub-contractor by the UUWF. If a consultant group or partnership of consultants will be sued, the proposal should indicate who will serve as the “point” person.
- Indicate whether the firm is a small or woman- or minority-owned business. People with disabilities, people of color, indigenous people, Hispanic/Latinx, and LGBTQ candidates are encouraged to apply. The UUA is committed to developing a diverse and talented staff team. If you are excited about this role, but are unsure whether you meet 100% of the requirements, we encourage you to inquire and/or apply.
- Full breakdown of costs for the research and development of a strategic plan. We are working with a base budget of \$5,000-\$7,000. Other amounts will be considered if a strong case is made.

Proposals will be reviewed and evaluated based on the following criteria:

- Qualifications
- Scope of Proposal
- Work Plan
- Budget

## **PROCESS FOR PROPOSAL SUBMISSION AND EVALUATION**

Proposals are due by 5:00 p.m. Eastern on Wednesday, May 15, 2019.

Send your proposal in PDF format to [uuwf@uuwf.org](mailto:uuwf@uuwf.org).

Subject line should read “UUWF Consultant Proposal”

Inquiries concerning this RFP should be directed to UUWF Administrator Dana Robb at [uuwf@uuwf.org](mailto:uuwf@uuwf.org).