



**PENNSYLVANIA  
COMMUNITY  
FOUNDATION  
ASSOCIATION**

# REQUEST FOR PROPOSALS (RFP)

**Pennsylvania Community  
Foundation Association (PACFA)**  
609 Walnut St, 2<sup>nd</sup> Floor  
Erie, PA 16502

**Issued for:** Strategic Planning Consultant

**Issued by:** Pennsylvania Community Foundation Association (PACFA)  
[PACFAPartners.org](http://PACFAPartners.org)

**Release Date:** July 15<sup>th</sup>, 2025

**Proposal Deadline:** August 1<sup>st</sup>, 2025

**Project Start:** September 24-26, 2025 (PACFA Fall Conference at the Hershey Lodge)

**Project End:** September 2026

**Project Budget:** \$15,000-30,000

## About PACFA

The Pennsylvania Community Foundation Association (PACFA) is a statewide membership organization that supports and connects community foundations across Pennsylvania. We work to advance and advocate for the role of community philanthropy in building stronger, more equitable communities. PACFA was created in 2021 to help Pennsylvania community foundation members connect with each other, learn from each other, and when possible, act together.

## Current State

PACFA membership is comprised of around 40 dues paying community foundations. Dues have remained steady since our launch in 2021. Sample programming includes webinars, new staff training academies, learning cohorts, an annual conference, CEO Summits and on-site consultations. Several significant public policy wins have been achieved through our Action Team process.

Current PACFA staffing is a recognized field leaders with over 30 years of experience leading a community foundation. Supportive services are provided through a grant to The Nonprofit Partnership in Erie, PA. PACFA has an active board of trustees, representing member community foundations.

## Project Purpose

PACFA is seeking a qualified consultant or consulting team to design and facilitate its first-ever strategic planning process. This work will guide PACFA's next five years by clarifying our values, defining strategic priorities, and identifying the business model necessary to support our mission.

## Project Objectives

The selected consultant will lead PACFA's board and leadership through a three-part process:

### **Phase 1:** *Clarify Values and Vision*

- Facilitate conversations that surface and define PACFA's organizational values.
- Develop a shared five-year vision that reflects member priorities and sector trends.

### **Phase 2:** *Define Strategic Priorities*

- Identify the core programs, services, and advocacy work PACFA should pursue to fulfill its mission and live out its values.

- Align this work with member needs, sector shifts, and the unique role PACFA plays in Pennsylvania.

### **Phase 3: *Align Revenue and Business Model***

- Explore and recommend sustainable funding and revenue strategies to support PACFA's future work.
- Provide recommendations on staffing, governance, and operational infrastructure aligned with the strategic direction.

### **Scope of Work**

The consultant will:

- Review relevant organizational documents and background materials.
- Interview board members, staff, and key external stakeholders (e.g., community foundation leaders, funders).
- Facilitate at least three in-person or virtual sessions, including an initial convening during PACFA's Fall Conference (Sept 24–26, 2025).
- Provide interim deliverables (summary findings, draft frameworks, strategic choices).
- Produce a final strategic plan document, with internal- and external-facing components, by March 31, 2026.

### **Desired Qualifications**

- Demonstrated experience leading strategic planning processes for philanthropic-serving organizations or associations.
- Deep understanding of the community foundation field and its evolving role in philanthropy.
- Strong facilitation and stakeholder engagement skills.
- Experience aligning strategy with organizational capacity and business modeling.

### **Submission Requirements**

Please include the following in your proposal:

1. Executive Summary
2. Approach & Methodology – Outline how you will design and facilitate the process, including your philosophy, tools, and expected engagement timeline.
3. Project Plan & Timeline – Proposed schedule, including key milestones from September 2025 to March 2026.
4. Deliverables – List of anticipated outputs (e.g., draft documents, final plan).
5. Budget – Itemized estimate of fees and expenses.
6. Consulting Team – Bios and roles of key personnel.
7. Relevant Experience – Examples of prior work with philanthropic-serving organizations or community foundations.
8. References – Contact information for three past clients.

### **Proposal Submission**

Submit proposals electronically by July 15<sup>th</sup>, 2025

Mike Batchelor, President & CEO

mike@pacfapartners.org

## **Evaluation Criteria**

Proposals will be evaluated based on:

- Experience with philanthropic-serving organizations or community foundations
- Quality and clarity of proposed methodology
- Qualifications of the consulting team
- Alignment with project scope and timeline
- Cost competitiveness and value