



# RAINFOREST TRUST®

**Project Title:**

Strategic Planning Consultant for Fundraising & Grant-making Environmental NGO

**Issuing Organization:**

Rainforest Trust  
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Warrenton, VA 20817  
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800-456-4930

**Proposal Deadline & Submission Instructions:**

Proposals must be submitted no later than 5:00 p.m. E.T. on February 7, 2025 via electronic mail to Melissa Hohimer, Chief Financial & Operating Officer (melissa.hohimer@rainforesttrust.org).

This request for proposals contains background information on Rainforest Trust and the specific information that must be included in any proposals submitted.

- I. Project Overview**
- II. Introduction to Rainforest Trust**
- III. Scope of Work and Deliverables**
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**I. Project Overview**

Rainforest Trust (“RT”) is seeking proposals from qualified strategic planning consultants to work closely with RT Senior Leadership and the Board of Directors to create and execute a process that results in a new five-year strategy for 2026-2030. As part of this process, RT envisions co-designing a series of discussions involving the Board of Directors, Senior Leadership Group, and RT staff on topics that will serve as inputs into the Plan. The external consultant will manage and facilitate a process that effectively engages all stakeholders and a product that maximizes delivery on our mission over the next five years. The outcome of this process will be a detailed written strategic plan that outlines our vision for 2030, including clear goals, strategies, performance metrics, and an actionable roadmap to ensure organizational success.

We anticipate this project to run from February 2025 through November 2025, culminating in a presentation and approval by the Board of Directors on November 7th.

**II. Introduction to Rainforest Trust**

Rainforest Trust is a global nonprofit organization incorporated in 1988 with the mission of saving endangered wildlife and protecting our planet by creating rainforest reserves through partnerships, community engagement, and donor support. Through our grantmaking model, we have protected more than 50 million acres by establishing protected areas in partnership with local organizations and engaged communities across more than 62 countries in Latin America and the Caribbean, Africa, and Asia-Pacific.

We are a fundraising organization with 90% of revenues from private philanthropy, raising \$45M-\$65M per year. We grant a similar amount annually to NGO organizations around the world and operate an otherwise modest budget of ~\$7M per year (excluding grants/disbursements to partners).

Rainforest Trust was incorporated in the state of NY but now operates with a business address in Virginia. While we rent two small offices, one in Warrenton VA and one in Washington D.C., we are an otherwise remote organization. We employ just over 50 people through a Professional Employer Organization for U.S.-based employees and through a Global Employer Organization for international employees. We also work with independent contractors via consulting contracts around the world.

You can find more information on our website:

[Our mission and cost-effective conservation approach](#)

[Our reports and financials](#)

[Our current 2021-2025 strategic plan](#) and [2023 mid-plan assessment](#)

### III. Scope of Work and Deliverables

The selected consultant will work closely with the CEO and Senior Leadership to design and complete each phase:

#### 1. Context & Discovery:

- Co-design the process with CEO and other Senior Leadership
- Facilitate, assist, or conduct preliminary discussions with key internal stakeholders (Board members, Senior Leadership, key staff) and possibly key external partners or supporters.
- Review current internal documents, reports, and any previous strategic plans or initiatives to understand the organization's context, strengths, challenges, and opportunities.
- If necessary, scan or document the external environment, including trends and challenges in the environmental sector and related fields.
- Incorporate best practices in nonprofit strategic planning, with an emphasis on sustainability, measurable outcomes, and stakeholder engagement.

#### 2. Facilitating Stakeholder Engagement:

- With the CEO, plan and facilitate discussion sessions, workshops, and meetings with:
  - The Board of Directors (and possibly Advisory Council)
  - The Senior Leadership Group
  - Key staff members
  - All staff members (potentially through departmental or all-staff meetings)
- Ensure these sessions are structured to encourage meaningful input, collaboration, and consensus-building.

#### 3. Assist the CEO and Senior Leaders in composing the Strategic Plan and Implementation Plan:

- Project manage the creation of a draft of the strategic plan based on the CEO's vision and findings from stakeholder engagements.
- The plan should include, but not be limited to:
  - Affirm our vision, mission, and values (no revisions anticipated)
  - A clear set of goals and objectives for 2030
  - Metrics and Key Performance Indicators (KPIs) to track success in achieving the organization's mission, fundraising results, and internal operations
  - Strategic initiatives and action steps to achieve each goal
  - Resource allocation strategies, including staffing and financial considerations
  - Timeline and milestones to track progress

- Assist with creating a final external version for publishing to our external stakeholders
  - Assist with creating an internal implementation plan to ensure successful execution
4. **Implementation Support (Optional):**
- Provide optional support for the first year of implementation (if agreed upon), which could include guidance on operationalizing the plan, training for staff, or facilitation of annual review processes.

**IV. Project Timeline**

January 23, 2025	Release RFP
February 7, 2025	RFP Deadline
February 10 - 28, 2025	Interviews (on a rolling basis)
By February 28, 2025	Consultant Selection Notification
March 3, 2025	Consultancy Start Date
November 7 2025	Final presentation to Board of Directors

**V. Proposal Requirements**

Proposals should include:

1. **Consultant Background:** An overview of the consultant or firm, including relevant experience and expertise, particularly in the non-profit environmental sector, and key bios of relevant staff
2. **Approach & Methodology:** A detailed description of the proposed approach including how you will design the process, facilitate discussions, and create the ultimate documents.
3. **Budget:** Detailed breakdown of fees including estimates for each phase of the work and optional supplemental support.
4. **References:** A list of references from previous clients, preferably from similarly sized non-profit organizations, preferably from fundraising organizations that grant internationally
5. **Sample work:** Any sample work that is available to share

**VI. Evaluation Criteria:**

The successful consultant must have:

1. **Experience and Expertise:** A proven track record working with global conservation and environmental NGOs including fundraising/re-granting organizations. Excellent project management skills, expertise in collaboratively designing processes, and skilled discussion facilitation. Knowledge of best-practices including programmatic, fundraising, and operational planning. Must be comfortable operating with remote, in-person, and hybrid groups. Must be comfortable collaborating via shared Google documents.

2. **Proposed Methodology:** Clear, effective approach to facilitating the planning process, including stakeholder engagement and outcome measurement. Approach is designed to be inclusive and engaging for participants with different demographic identities. Include availability and willingness to travel for in person meetings.
3. **Cost Effectiveness:** Reasonable budget in relation to the scope of services provided.
4. **References and Sample Work:** Positive feedback from previous clients and examples of successful strategic plans.