



# GREEN LEADERSHIP TRUST

## REQUEST FOR PROPOSAL STRATEGIC PLANNING PROCESS

### General Information

Project objective: To proactively facilitate a strategic planning process resulting in a comprehensive 3-year written strategic plan for Green Leadership Trust.

Issuing organization:  
Green Leadership Trust  
P.O. Box 65826  
Washington, DC 20035

RFP issued: Tuesday, December 15<sup>th</sup>, 2020  
Due date for proposals: Friday, February 19<sup>th</sup>, 2021 by 5:00pm ET

Contact for further information: Karen Driscoll, VP of Programs, [kdriscoll@rabengroup.com](mailto:kdriscoll@rabengroup.com)

### Summary

Green Leadership Trust (GLT) is seeking consulting services to proactively facilitate a strategic planning process resulting in a comprehensive 3-year written strategic plan for the organization. The process should be inclusive of members, staff, Steering Committee, Raben Group contractors, and external stakeholders. GLT would like to address strategic questions about our goals, objectives, impact, and outcomes; role amongst our member organizations; governance and leadership models; and needs for staffing and budget. The ideal candidate to lead this process has strong communication, facilitation, and conflict resolution skills; extensive experience working with emerging non-profit organizations; and proven success facilitating research- and discovery-based strategic plans. A competitive proposal budget will be an important factor in the selection of the consultant.

### Background

Established in 2013, Green Leadership Trust's mission is to build power for the environmental and conservation movement, including communities of color and indigenous communities, by leveraging the knowledge, experience, and networks of participating board members. We do so by training and activating these leaders serving Boards of environmental organizations. GLT is unique in that it is the first cross organizational effort focused on building power and diversity in any advocacy sector.

We operate on a budget of approximately \$350,000. We have 2 Full time staff and 4 contractors and are a membership organization with over 100 members. The full membership meets annually and maintains five working groups/committees: Equity, Finance, Members, Capacity Building, and Communications.

Green Leadership Trust is governed by a Steering Committee (9 people) 3 of which serve as Co- chairs for a two-year period acting in advisory capacities. Together with the Executive Director, the Director of Strategic Initiatives, and the VP of Programs, they make up the management team.



# GREEN LEADERSHIP TRUST

GLT is transforming the sector by diversifying its leadership and encouraging investments and programs that reflect the needs and values of diverse communities. Over the last few years, GLT has convened its membership in person, set initial direction, built an active membership base, engaged in joint projects (e.g., the development of best practices for the sector), raised an operating budget, hired its first Executive Director and strengthened relationships with the Green Groups' CEOs and leadership as well as environmental justice organizations. The uncharacteristic conditions that COVID-19 has imposed on our country and the entrenched systemic racism juxtaposed to a growing antiracism movement allow for unique opportunities for GLT to engage in a streamlined, yet thoughtful, strategic planning process. We need to revisit our vision and prioritize key strategies and focus areas for the next three years. The strategic planning process will create greater alignment and cohesion among GLT members around shared aims, efforts and intended outcomes, and will strengthen GLT's position to continue its cutting edge leadership work, promoting diversity, equity and inclusion in the rapidly changing environmental sector.

Green Leadership Trust is the first cross-organizational effort focused on building power and diversity in any advocacy sector. Through an annual board member census, we have identified all (or most) of the people of color and indigenous people on major national environmental and conservation boards. Our programs support diversification of the most senior environmental leadership through promotion of board best practices and by driving the leadership pipeline. Green Leadership Trust works closely with Green Group CEOs and is funded both by foundations and Green Group member organizations. Green Leadership Trust works with an extensive set of partners, including CEOs and Equity officers to non-governmental environmental organizations, environmental justice organizations and community leaders of color and indigenous people.

GLT currently has four primary goals:

- I Diversify Boards (through recruitment, placement, and best practices)
- II Place Equity front and center in all decisions (with CEO performance evaluations and in all conversations)
- III Develop Board member capacity building (webinars, annual convenings and monthly member calls)
- IV Ensure sustainability and governance (Fundraising and Development plan and activities, Strategic planning and establishing committee structure.

GLT is a storied and successful organization that has experienced significant recent growth in both its staff and the scope of its work. Green Leadership Trust is embarking on a growth phase at a time of urgency for equity as well as the intersection of those issues with climate change and racism. An important outcome of the strategic planning process will be to achieve consensus on a refined set of realistic, relevant goals and strategies, centered on a clearly articulated and compelling vision.



# GREEN LEADERSHIP TRUST

## **Scope of Work**

GLT is seeking a consultant or consultancy to proactively facilitate a thoughtful strategic planning process with its Steering Committee, staff, and Raben Group contractors that results in a comprehensive written 3-year strategic plan, and a 3-year budget framework to support it. The process guidelines will include a strategic decision-making matrix/plan that enables the organization to remain flexible and responsive and involve key stakeholders. The initial strategic plan will be grounded in an environmental scan of key stakeholders and a highly inclusive process involving Green Leadership Trust staff, contractors, and volunteer leadership.

The plan will include a vision for the future of Green Leadership Trust, along with measurable goals and actions to guide the organization for the next 3 years. The consultant will work directly with a pre-existing ad hoc committee over 6 months, commencing in February 2021 and concluding by July 2021. The proposed scope of work will include a three-pronged approach defined as

## **Discovery: Data Gathering + Assessment Phase (February and March 2021)**

- Finalize the strategic planning process scope of work and consultant contract.
- Review relevant GLT materials, website content and previous strategy documents.
- Taking stock of the previous strategic planning process from 2017 (what worked, what was achieved, what needs changed).
- Highly inclusive data gathering process engaging all staff, Steering Committee, membership, and environmental organization CEOs.
- Design and conduct an electronic survey and interviews of key stakeholders (including GLT members, Steering Committee members, Green Group CEOs, funders, sector thought leaders, and other important partners) to assess and evaluate GLT current efforts, strengths and challenges and to surface strategic opportunities, disruptors, and questions for the group to consider moving forward. This scan will also reveal how Green Leadership Trust is seen within the relevant community.
- Synthesize the assessment data into a short key finding report and a presentation for GLT's monthly member call in April 2021.

## **Thinking Big: Strategic Planning + Visioning Phase (April-May 2021)**

- Design, prepare for and facilitate dynamic strategic planning and visioning discussions.
- Through structured exercises and discussions, engage GLT's membership to address and clarify questions of vision, purpose, goals, objectives, desired outcomes, structure, and decision-making.
- Briefing of cultural and political context of current conditions in our country.
- Continue moving the planning process forward through meetings with GLT's Strategic Planning team.

## **Moving Forward with Vision: Recommendations + Strategic Plan Development Phase (June-July 2021)**

- Create a structure and outline for the GLT's strategic plan. Synthesize the key decisions, vision, goals, and priorities into an outline to support the development of a draft strategic plan.
- Support the SP team to write, refine and finalize a plan that provides a compelling roadmap of GLT's strategic direction and work over the next three years.



# GREEN LEADERSHIP TRUST

Consider important operational elements (such as staffing, budgets, programming, etc.) and support the development of operational plans and budgets as needed.

- Facilitated staff retreat on strategic plan, and additional sessions as needed
- Present the plan to full membership and other key stakeholders and move toward adoption and implementation of the plan.
- Debrief and evaluate the Strategic Planning Process with GLT's SP team, The Raben Group and the Steering Committee at a facilitated Steering Committee retreat.

## **Deliverables**

GLT's strategic planning process will lead to the following deliverables and outcomes:

- An inspiring vision that provides the basis for GLT's strategies, objectives, program work, activities, partnerships, etc.
- A succinct five-ten page strategic plan that outlines the group's purpose, objectives, key projects and intended outcomes, and that provides a clear roadmap for GLT's work over the next 3 years
- Greater internal cohesion, excitement, commitment, and group alignment around GLT's work and aims by the broader membership and other stakeholders
- Consideration of significant operational elements (including staffing, budget, and programming)
- Outline of a business model and organizational structure (staff, Steering Committee, advisors, etc.) that will best enable Green Leadership Trust to achieve the plan's goals
- Useful external facing materials about GLT, which effectively communicate GLT's refined purpose, objectives, projects, and impact to key audiences
- Evaluation plans/strategies, including a process, such as decision-making matrix and workflow, for ongoing plan updates
- Evaluation of existing and potential partners and key constituents.

## **Proposal**

Your proposal should be no longer than 5 pages, address the scope, deliverables and planning methodology, include a budget and the anticipated hours necessary (for the consultant, the Steering Committee, staff and other stakeholders) for project completion, and indicate who will be the primary consultant on the project.

An additional attachment of no more than 2 pages should include your recent engagements and references. You may submit the proposal to the Strategic Planning Committee, by email to Karen Driscoll VP of Programs at [kdriscoll@rabengroup.com](mailto:kdriscoll@rabengroup.com)

Any costs or time associated with the preparation of a proposal response to this RFP are the responsibility of the bidder and will not be reimbursed.

Depending on the final scope of work for the GLT's strategic planning process, consultant fees and the budget for this project will range from \$15,000-\$20,000. This assumes a consultant hourly rate of \$150 with a maximum of 125 consultant hours on this project.



# GREEN LEADERSHIP TRUST

Reimbursement for reasonable direct expenses (i.e., mileage, materials, parking, transit, etc.) related to the consultant's work on this project is additional beyond the contract amount and will be billed separately. Travel time by the consultant will be billed at \$50/hour.

## **Timetable**

- First interviews: Monday, March 1st, 2021 from 2pm to 4pm ET or Tuesday, March 2nd, 2021 from 9:30am to 11:30am ET
- Second interviews: Wednesday, March 10th from 2pm to 4pm ET
- Select firm: Friday, March 12th, 2021
- Staff retreat (dates TBD).
- Submit final product: Thursday, August 12th, 2021

Email submissions may be made to: Karen Driscoll, VP of Programs, [kdriscoll@rabengroup.com](mailto:kdriscoll@rabengroup.com)