

Organizational Strategic Planning, Phase 2 Statement of Work and Request for Proposals

July 10, 2020

Background and Statement of Work

The National Forest Foundation (NFF) has begun a process to develop an organizational strategic plan for the next three (starting in 2021). The NFF is completing Phase 1 of the process, and is soliciting proposals for Phase 2, which will build on the initial work done; engage the Board of Directors, USDA Forest Service, and staff; and result in the final strategic plan being completed and ready for board consideration no later than June 2021. Our goals are to use an efficient yet inclusive process to develop a concise and clear strategic plan document(s) that aligns internal and external audiences to our organizational direction.

Information Requested

If interested in this project, please provide a bid for the above statement of work by providing approach, work experience, and cost. Please also include your capacity for this project and efficiency in nonprofit strategic planning projects in the past, if any.

This is a request for proposals only and quotations furnished are not offers. This request does not commit the National Forest Foundation to pay any costs incurred in the preparation of submission of the quotation or to contract for supplies or services.

General Specifications

- (a) Description of Work – This Request for Proposals is for services related to guiding Phase 2 of an organizational strategic planning process, which:
1. Builds on the initial work done in Phase 1.
 2. Creates a project schedule in coordination with the NFF to end in the completion of the strategic plan.
 3. Engages the NFF Board at least two times (virtual or in person depending on the current travel situation and targeting November 2020 and spring 2021). The Board may establish a working group and additional engagements with this group are possible.
 4. Incorporates staff input as provided by the staff working group.
 5. Engages the Forest Service through a meeting of the NFF's National Forest Leadership Council in the fall or winter 2020/2021.
 6. Results in the completion of a final draft of the strategic plan for consideration by the NFF Board no later than June 2021.

The Contractor shall identify which efforts and materials they can supply in terms of materials, labor, equipment, supplies, supervision, quality control, and incidentals required to complete the work described. The Contractor shall perform all work in a safe and conscientious manner.

(b) Project Location- Primarily virtual, with the possibility of in-person meeting(s) pending safety considerations and lifting of Covid-19 restrictions.

(c) Work Schedule-

September 2020	<ul style="list-style-type: none"> Contractor gains familiarity with Phase 1
September - December 2020	<ul style="list-style-type: none"> Develop project schedule One Board engagement Forest Service engagement Review research products with the staff working group
January - March 2021	<ul style="list-style-type: none"> Develop initial draft of strategic plan Potential engagements with NFF Board working group and/or Executive Committee Revise draft strategic plan upon receiving input
April - June 2021	<ul style="list-style-type: none"> One Board engagement to review draft Revise as needed upon receiving input with final document for Board consideration in July 2021

Pricing Schedule

Contacto shall price work according to the schedule below. Prevailing wages will be required per conditions of funding sources.

Description	Unit	Unit Cost	Quantity	Total Cost
Gain familiarity with Phase 1 work	1			
Develop project schedule and plan	1			
Plan, facilitate, and document at least two board engagements (likely virtual)	1			
Plan, facilitate, and document Forest Service engagement (likely virtual)	1			
Document drafting, revision, and production of final draft	1			

Other Project Requirements and Specifications

Specifications - Project work shall be accomplished in accordance with the attached background document.

Contractor Qualifications

- (a) References – Please provide three references.
- (b) Past Experience – Please provide a brief explanation of previous work experience with nonprofit organizations.

Insurance Requirements

Upon selection of the winning bid, the chosen contractor will be asked to affirm that it has and shall maintain State minimum workers' compensation insurance coverage for its employees, if any. The Contractor shall also maintain broad form general liability, property damage, and automotive liability insurance for bodily injury, death, or damage to property of any person. The Contractor shall name NFF an Additional Named Insured and provide NFF with documentation evidencing such coverages.

Bid Submission

Submit bids via email to kdibari@nationalforests.org by August 12, 2020.

Contractor Selection Process

The NFF will use the Evaluation Factors below to review each submitted bid. This RFP is the first step of our approach. After reviewing the RFPs we will identify a subset of bidders (likely two) to present their strategic planning approaches via Adobe Connect (~60 minutes). From there we will promptly make our decision. Based on the outcomes of that selection process, the NFF will notify successful and unsuccessful bidders no later than September 9, 2020. and will prepare a separate contract document.

Point of Contact

For questions about the details of producing the bid, please contact:

Karen DiBari
National Forest Foundation, Director, Conservation Connect
(406) 830-3352
kdibari@nationalforests.org

Evaluation Factors

- Price / cost
- Technical proposal / proposed approach to project
- Overall strategic benefits to meeting NFF goals, requirements, and timelines
- Timing of when contractor can begin and/or finish the project
- Past performance, references

Equal Opportunity Provider

In accordance with Federal law and U.S. Department of Agriculture policy, the National Forest Foundation is prohibited from discriminating on the basis of race, color, national origin, sex, age, religion, political beliefs, or disability.

Strategic Planning Process Management and Production Background Information

July 10, 2020

COMMERCIAL REQUIREMENTS

Confidentiality

The RFP and all related materials are strictly confidential and are the property of the NFF. No parties shall advertise, publish, broadcast or in any way make the RFP public or of general knowledge of any party without first obtaining the written consent of the NFF. If for any reason these terms are not acceptable, please inform Karen DiBari immediately.

All submitted materials shall become the property of the NFF. Any materials submitted by the contractor, which are considered confidential, must be clearly marked as such at the time of submission. The NFF shall make every reasonable effort to maintain confidentiality of such information.

Costs Associated With Proposal

Any costs incurred by the contractors in preparing the response to the RFP, in whatever shape or form, will be borne solely by the prospective contractor.

NATIONAL FOREST FOUNDATION

Organization

Chartered by Congress, the National Forest Foundation (NFF) was created with a simple mission: bring people together to restore and enhance our National Forests and Grasslands. The NFF is the leading organization inspiring personal and meaningful connections to our National Forests, the centerpiece of America's public lands. Working on behalf of the American public, the NFF leads forest conservation efforts and promotes responsible recreation on the 193 million acre National Forest System. We believe these lands, and all they provide, are an American treasure and are vital to the health of our communities.

As the nonprofit partner of the U.S. Forest Service, we engage Americans in community-based and national programs that promote the health and public enjoyment of the National Forest System. We also administer private gifts of funds and land for the benefit of the National Forests. Please see nationalforests.org for more information. In helping the U.S. Forest Service fulfill its mission "to maintain the health, diversity and productivity of the nation's forests and grasslands to meet the needs of present and future generations" we work in close collaboration with local people and communities. The NFF conducts on-the-ground restoration work, awards grants, and facilitates collaborative groups for major forest restoration work.

Background

The NFF has seen tremendous growth in the last five years, doubling our staff and program of work across the country. We recently completed a re-branding exercise and have a new logo and brand positioning.

While the organization has grown, we are still lean. In the past, we have had five-year strategic plans to guide our work. We will look to the selected consultant to advise us on the duration of the strategic plan after becoming more familiar with the NFF.

The NFF is led by our President and CEO, Mary Mitsos, with the assistance of a Management Team consisting of three other staff. As a whole, our staff are located in multiple locations across the country with approximately half in Missoula, MT. In a normal year, the NFF Board of Directors meets four times a year, two of which are telephonic and two of which are in person meetings. We are ready to pivot to all virtual meetings if necessary.

Strategic Plan Goal

To use an efficient yet inclusive process to develop a concise and clear strategic plan document(s) that aligns internal and external audiences to our organizational direction.

What Defines Overall Success?

We believe that success with a new strategic plan will:

- 1) Synchronize with the new NFF organizational brand.
- 2) Synchronize with existing programs.
- 3) Guide our organizational growth strategy.
- 4) Guide our programmatic work and donor priorities.

Expectations:

- 1) Advise the NFF on the appropriate duration of the strategic plan.
- 2) Appropriately engage the NFF staff and Board, and Forest Service in the development of the strategic plan.
- 3) Participate in the April 2021 Board meeting (Phoenix, AZ).
- 4) Produce a concise and clear strategic plan document(s) to align internal and external audiences to our organizational direction.

Budget:

While we are a nonprofit with limited resources, we are prepared to invest as needed for this project.

NFF RESOURCES

NFF website: <https://www.nationalforests.org/>

NFF magazine, *Your National Forests*: <https://www.nationalforests.org/our-forests/your-national-forests-magazine>

NFF annual reports: <https://www.nationalforests.org/who-we-are/annual-reports>

<https://www.facebook.com/NationalForestFoundation>

<https://twitter.com/nationalforests>

<https://www.instagram.com/nationalforests/>

<https://www.youtube.com/user/natlforests>

<https://www.linkedin.com/company/national-forest-foundation/>