



Introduction

Rare seeks the services of an experienced external facilitator to help design, organize, and lead a three-day, in-person strategic planning workshop at Rare headquarters in Arlington, VA from Wednesday, January 29 to Friday, January 31, 2025. The facilitator will ensure a productive, inclusive, and engaging environment that achieves the intended objectives and fosters meaningful collaboration among participants.

The deadline to submit is Wednesday, December 18 by close of business Eastern Standard Time.

About Rare

General

Rare is a global leader in accelerating social change so people and nature can thrive. We believe in the power of individuals, communities, and their local leaders to restore and protect the waters, lands, and climate that sustain us all. By igniting collective action, we can create lasting change for the planet. For 50 years, across 60 countries, we have supported millions of people and thousands of communities to shift their behaviors and practices to protect our shared planet.

With offices in 11 countries, Rare has five programs that support the shared goal of driving collective action at the local level to address global challenges:

- 1. Center for Behavior & the Environment: Our People-Centered Approach**
Rare's Center for Behavior & the Environment (BE.Center) is the world's first center dedicated exclusively to behavioral science and design for the environment. The diverse team of world-class behavioral and social scientists, designers, and trainers supports Rare and partners to design and deliver people-centered solutions to our most urgent environmental challenges like climate change, overfishing, unsustainable land use, food and plastic waste, and biodiversity loss.
- 2. Climate Culture: Inspiring Individual Climate Action**
Climate experts and advocates now emphasize individuals' significant roles in mitigating climate change. Rare's Climate Culture program champions this by encouraging lifestyle shifts — like eating less meat and reducing food waste, driving electric vehicles, and adopting solar energy. These choices cut down on personal carbon emissions and influence the behavior of those around them. Our research indicates that people are more likely to adopt climate-friendly behaviors when they observe others doing them. Such 'social proof' is a stronger motivator than one's income, background, or even political affiliation.



Through Climate Culture, Rare equips and engages the communities, creators, and partners who have the power to shift culture with the insights and tools that make high-impact climate-friendly lifestyle changes more popular, appealing, and easier to adopt.

3. Fish Forever: Revitalizing Coastal Communities

The livelihoods, food security, and climate resilience for hundreds of millions of people globally are tied to the health of small-scale fisheries. Rare's Fish Forever program works to revitalize coastal fisheries that lie within coastal waters brimming with biodiversity. Leveraging biological, behavioral, and social sciences, Rare works with partners and local leaders to sustain fisheries production, build coordinated advocacy among governments, and elevate the voices, concerns and priorities of fishers and coastal communities.

4. Innovative Finance: Financing Sustainable Ecosystems

Small-scale fishers and smallholder farmers around the world live adjacent to a wealth of natural resources. But living in rural and remote communities is a barrier to benefitting from the value of the resources. These communities lack access to formal financial services like bank accounts, formal debt, or insurance, while financial service providers and global development organizations often lack mechanisms to effectively deliver resources to these communities.

Where traditional financial systems and strategies fail, innovative finance bridges the gap. Rare's Innovative Finance program connects rural and remote communities on nature's frontlines to the formal financial sector, helping them build resilience to both financial shocks and the consequences of climate change. By breaking down barriers separating communities and the formal economy, Rare helps build financial resilience and reduces pressure on nature.

5. Lands for Life: Empowering Farmers

Lands for Life, Rare's regenerative agriculture program in Colombia, seeks to transform and reimagine how we farm for the future. We partner with farming communities in high-biodiversity ecosystems to shift to regenerative agriculture and more sustainable ranching practices. The program helps smallholder farmers create sustainable and long-term solutions for people, biodiversity, and the climate.

Strategic Planning

In 2020, Rare completed a five-year strategic plan designed to guide our work from 2020 – 2025. Since then, we have experienced tremendous growth and change in our budget, programs, and operations. This growth and change will serve as the foundation for our next five-year plan but also shines a light on critical questions about the years ahead.



We embarked upon our 2030 strategic planning process in September 2024 and aim to complete the process by September 2025. Some of the big questions we are tackling during this process include:

- *Why* does Rare exist?
- *What* is the specific change in the world we seek to deliver?
- *What* specific issues should we tackle within these global priorities?
- *How* specifically is Rare positioned to deliver?

Scope of Work

The facilitator will be responsible for the following:

1. **Pre-Meeting Preparation:**

- Meet with key stakeholders to understand meeting goals, objectives, and desired outcomes.
- Develop an agenda tailored to the meeting's objectives and participant needs.
- Design interactive activities, exercises, or frameworks to encourage engagement and productivity.
- Create materials needed for participants to successfully contribute to discussions, e.g. staff input summaries.
- Guide presenters in the preparation of their interventions.
- Review relevant materials (e.g., strategic documents, reports, prior meeting notes) to inform planning.

2. **Meeting Facilitation:**

- Facilitate a three-day, in-person workshop from Wednesday, January 29 – Friday, January 31, 2025, at Rare headquarters in Arlington, VA.
- Guide discussions to ensure alignment with objectives and adherence to the agenda.
- Foster a collaborative environment, ensuring all voices are heard and respected.
- Address conflicts or challenges constructively to maintain momentum and focus.

3. **Post-Meeting Follow-Up:**

- Summarize key discussions, decisions, and action items into a clear and concise report.
- Provide recommendations or insights for follow-up actions as needed.

Meeting Participants

The total number of meeting participants will fluctuate between 20 – 30 people representing senior leadership from across Rare's operational and programmatic units.



Deliverables

The facilitator will provide:

1. A finalized agenda approved by Rare before the meeting.
2. Facilitation of the workshop as per the agreed schedule.
3. A detailed post-meeting summary report, including:
 - Key takeaways, decisions, and next steps.
 - Recommendations for follow-up actions or improvements.

Timeline

1. **Kick-Off Call/Consultation:** January 6, 2025
2. **Agenda Finalization:** January 21, 2025
3. **Meeting Date(s):** January 29 – 31, 2025
4. **Post-Meeting Summary Delivery:** February 14, 2025

Roles & Responsibilities

Facilitator Responsibilities:

- Review background materials and key documents provided by Rare.
- Assist in design of meeting objectives and agenda.
- Deliver a structured, engaging, and productive meeting experience.
- Provide clear communication and maintain flexibility to address evolving needs.
- Ensure alignment with the organization's goals and objectives.

Rare Responsibilities:

- Provide background materials, key documents, and access to stakeholders as needed.
- Approve the agenda and proposed activities.
- Ensure timely communication and feedback during planning and post-meeting phases.

Evaluation Criteria for Success

The success of the facilitation services will be measured by:

- Achieve workshop goal and objectives by adaptively managing agenda.
- Delivery of a comprehensive and actionable post-meeting report.

Submission Requirements

Section 1: Experience & Qualifications

Please limit this section to no more than two pages.



1. Describe your experience and capabilities vis-a-vis the Scope of Work and Responsibilities above. A key consideration will be experience working with international nonprofits similar to Rare in size and scope in leadership meeting facilitation. Expertise in working with similar nonprofits who work on environmental issues (including, but not limited to, land use, climate, coastal fisheries, etc.) is a significant plus.
2. Describe what differentiates you from other individuals who do similar strategic planning and facilitation work.

Section 2: References

Respondents should provide contact information for references as follows:

1. At least two (2) references that can attest to the quality and effectiveness of your relevant work;
2. The contact information should include the contact name, phone number, email address, and website address.

Section 3: Price Proposal

Please provide a proposed fixed-fee budget and accompanying narrative or notes aligning with the Scope of Work.

Submission Instructions

Consultants interested in providing the services described above should submit a cover letter and proposal by **Wednesday, December 18, 2024, by close of business Eastern Standard Time** in accordance with these instructions. The proposal must include the prescribed format and content in the Submission Requirements section. Adherence to the proposal format by all proposers will ensure a fair evaluation of Rare's needs. Proposals that do not follow the prescribed format may be deemed non-responsive.

Proposals must be submitted electronically to Vanessa Chumbley, vchumbley@rare.org, with "Rare Strategic Planning Facilitator Proposal" in the subject line. No phone calls, please. Applications received after the submission deadline will be rejected. Rare reserves the right to award under this RFP without interviews or further negotiations. Rare reserves the right in its sole discretion to reject any or all proposals, in whole or in part, without incurring cost or liability.

Selection & Timing

Proposals will be promptly reviewed after the proposal submission deadline. Rare may select proposers to do an interview/presentation of their proposal to Rare. If interview presentations



are desired, the presentations will be via video conference at Rare's discretion. Rare will not compensate and/or reimburse any selected consultants for their labor and/or expenses related to the presentations. Although Rare reserves the right to forego interview presentations, if we decide to interview any proposers, those interview presentations are targeted to occur by video conference by December 20, 2024. We'd anticipate a final decision shortly after those interviews and a project kick-off by January 6, 2025.

Confidentiality

The facilitator agrees to maintain the confidentiality of all sensitive information shared during the project and not disclose it to any third parties without prior written consent from Rare.