



RAINFOREST
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Request for Proposals (RFP)

Planned Giving Contractor

Issued by: Rainforest Trust

Proposals should be sent to: jennifer.clay@rainforesttrust.org

Deadline: 12/5/2025

Background

Rainforest Trust is a global nonprofit organization, founded in 1988, with a mission to save endangered wildlife and protect our planet by creating rainforest reserves through partnerships, community engagement, and donor support. We have protected over 56 million acres across 62 countries and raise \$45M–\$65M annually, with 90% from private philanthropy.

We now seek a **Planned Giving Contractor** to develop and implement a planned giving program to support our donor engagement and fundraising excellence.

1. Introduction

This Statement of Work (SOW) outlines the agreement between Rainforest Trust and the selected Contractor for the development and initial implementation of a planned giving program.

2. Objectives

The contractor will develop a planned giving program for Rainforest Trust and support its initial implementation through development of a comprehensive Planned Giving strategy, development of materials, training of frontline staff, and consultation related to complex planned giving inquiries.

3. Scope of Work

The contractor will perform the following tasks:

- **Program Development:**
 - Review the current landscape of fundraising and capability at Rainforest Trust. Based on this review and Rainforest Trust's unique needs, resources, and limitations:
 - i. Develop a comprehensive, Year 1 Planned Giving Strategy
 - ii. Recommend materials, tools, outreach strategies, campaigns, systems, and training needed for a successful planned giving program.
 - iii. Advise on the necessary financial systems to manage planned gifts.
- **Materials Development:**

All materials, tools, and documents developed under this contract will be the property of Rainforest Trust

 - Develop materials, and create supplementary language for existing materials, to identify, acquire, document, and recognize planned givers.
- **Training:**
 - Provide training to frontline staff on planned giving basics.
 - Educate staff on cues and clues to identify potential planned givers.



- Instruct staff on how to engage in basic planned giving discussions.
 - Coach staff to discuss blended gifts.
- **Consultation:**
 - Answer questions related to complex planned giving inquiries.
- **Final Summary Report, inclusive of:**
 - Report of Progress/ Deliverables Achieved
 - Recommended next steps

4. Timeline and Compensation

- Anticipated start date of January 15, 2026.
- The initial contract will be for 40 hours in total.
- Month 1: 20 hours.
- Month 2: 10 hours.
- Month 3: 10 hours.
- The contractor's rate is \$250 per hour.

Potential for additional hours after conclusion of initial contract.

5. Performance Management & Accountability

- Contractor must provide **weekly updates in Asana** (task progress, blockers, next steps)
- Deliverables must be **approved by Rainforest Trust staff** before payment release
- Payments will be made upon approval of completed, agreed deliverables, based on the contracted hourly rate

6. Proposal Requirements

Interested consultants must submit:

- Resume/CV and any certifications
- Brief description of relevant work for other organizations
- Confirmation of availability and willingness to provide **weekly Asana updates**
- A results-based project plan or work approach
- At least two client references (with contact details)
- (Optional) Sample deliverables

7. Submission Instructions

- **Deadline:** 12/5/2025, 5:00 pm ET
- **Submission Contact:** jennifer.clay@rainforesttrust.org
- **Submission Process:**
 - Proposals should be submitted in PDF format via email with the subject line: Planned Giving Contractor.
 - Proposals will be accepted by email to the address above until December 5, 2025, 5:00 pm ET

8. Evaluation Criteria

Proposals will be evaluated on:

- Technical expertise and demonstrated success
- Quality and clarity of proposal



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- Strength of results-oriented approach
- Ability to provide accountability through Asana
- Client references confirming timely delivery of tested solutions
- Availability to meet Rainforest Trust's needs within the proposed timeline and budget

This Request for Proposal represents the requirements for an open and competitive process. This request does not commit Rainforest Trust to award a contract, to pay any costs incurred in the preparation of the proposal, or to procure or contract for services or goods. All respondents to this RFP shall indemnify and hold harmless Rainforest Trust and any of their officers and employees from all suits and claims alleged to be a result of this RFP. Rainforest Trust reserves the right to determine, at its sole discretion, whether any aspect of a respondent's proposal meets the criteria in this RFP.