



Request for Proposals

Openlands 2026 – 2031 Strategic Plan

Introduction and Summary

Openlands is requesting proposals for consultants (or consulting team) with strategic planning expertise. The consultants will take Openlands through a process that produces a five-year strategy for one of the first metropolitan conservation organizations in the country. The strategy will help Openlands achieve and measure impact in a geography with considerable ecological, cultural, demographic, and jurisdictional complexity. Openlands is seeking a plan and implementation structure that delivers next-level conservation in this context.

In November 2023, Openlands hired its first new President and CEO in 35 years. This leadership transition marked one of the final achievements of the Openlands 2018 – 2022 strategic plan. Over the past year, the Openlands Board of Directors and staff have honored both the success of the strategy and the task of creating change during a period in history that includes the COVID-19 global pandemic, social unrest, macro societal shifts, and troubling trends in climate and biodiversity. Given these realities, Openlands has carefully documented its strengths and challenges in a collection of source materials for use during strategic planning.

Strategic planning at Openlands will last a maximum of nine months. The consultants will understand large nonprofit organizations and land conservation and will have a good understanding of northeastern Illinois and the surrounding region. Experience with and among racially, culturally, and politically diverse stakeholders is important. The Openlands consultants will have proven project management skills.

About Openlands

Founded in 1963, Openlands protects the natural and open spaces of northeastern Illinois and the surrounding region to ensure cleaner air and water, protect natural habitats and wildlife, and help balance and enrich the lives of people. Since its creation as a program of the Welfare Council of Metropolitan Chicago, the organization has been at the forefront of the urban conservation movement. As one of the first organizations in the country to address environmental issues within a metropolitan region, Openlands understands that people are essential to nature.

Openlands envisions a landscape that includes a vast network of land and water trails, tree-lined streets, and intimate public gardens within easy reach of every urban dweller. This vision also includes parks and preserves big enough to provide natural habitat and to give visitors a sense of the vast prairies, woodlands, and wetlands that were here before the cities. Openlands believes that protected open space is critical for the quality of life in the region.

With over 60 years of impact, Openlands has much to celebrate. Signature achievements include 71,000 acres of protected land; passage of Chicago's Lakefront Protection Ordinance and the Vote Yes Campaign for the Forest Preserves of Cook County; establishing the country's first heritage corridor with the Illinois and Michigan Canal National Heritage Corridor; the creation of two federally protected landscapes in the region, Midewin National Tallgrass Prairie and Hackmatack National Wildlife Refuge; partnerships with hundreds of community and regional organizations; and pioneering one of the finest urban forestry

programs in the country. Always creating a brighter future, Openlands has been instrumental in launching strong environmental organizations, including Alliance for the Great Lakes, Friends of the Chicago River, Friends of the Parks, McHenry County Conservation District, and NeighborSpace.

An accredited land trust since 2013, Openlands purchases, restores, and transfers land to public and private stewards for protection. Unlike most land trusts, Openlands does not take ownership of land long term. With a staff of nearly 50 across seven departments, 10 teams, and 14 programs, Openlands is among the largest members of national accreditation partner Land Trust Alliance.

Who is Openlands looking for?

Openlands seeks a client-focused consultant with expertise in nonprofit strategy, as well as operating functions required for strategy execution, including finance, fundraising, all aspects of diverse stakeholder culture, and performance metrics. The consultants will have knowledge of land conservation and the ability to extract and discern knowledge from the expert staff at Openlands. The consultants will be adept at gathering multiple streams of information from diverse perspectives and synthesizing that information into clear and actionable strategic priorities, goals, objectives, and metrics for feedback and refinement. The consultants will skillfully facilitate change management discussions that could result in programmatic sunseting based on qualitative and quantitative measures of program performance, external conditions (market, sector trends, political landscape), funding, and feedback from the Board of Directors and Leadership Team. Openlands will also need advisement on its organization structure for the implementation of the new strategic plan. Efficiency is vital. The consultants will be excellent project managers, coordinators, and communicators, freeing staff to contribute intellectually to the planning process as follows:

Phase 1: Review, research, and engagement. This phase of strategic planning will include a thorough review of pre-planning source materials (2018 – 2022 strategic plan, impact reporting on the plan, programmatic and operational SWOT analyses, board retreat deliverables, donor surveys, and more); best practices research on land conservation; and engagement of Openlands donors, institutional funders, peer organizations, conservation-adjacent organizations, and government, for-profit, and community stakeholders. Phase 1 deliverable is highly curated information and knowledge presented in a structured format to allow for efficiency and ease with strategy creation. Phase 1 will be managed by the consultants with support from the Openlands Executive Office, Leadership Team, and Program Directors.

Phase 2: Parameters, then plan-making. This phase of strategic planning starts with creating a framework/outline for the new strategy to ensure Board of Directors alignment using data and information from Phase 1. Following Board approval of the framework/outline, official strategy is created, including areas of impact and clear pathways to achieve it. This phase might include prioritization, resource allocation, and an implementation schedule with a timeline and critical milestones. The deliverable is the plan document. Phase 2 will be managed by the consultants with support from a Board sub-committee, Executive Office, and Leadership Team on the framework/outline. The entire staff will participate in the creation of the official strategy.

Phase 3: Metrics design and organization structure. This phase of strategic planning will include the design of a strategy evaluation framework and performance metrics to allow Openlands to

track and report on strategy progress over time. This phase will also include organization structure analyses and recommendations to prepare for plan implementation. The deliverables include an evaluation framework (i.e., impact performance metrics) and draft organization structure. Phase 3 will be managed by the consultants with support from the Executive Office, Leadership Team, Program Directors, and the internal Openlands Data Infrastructure Working Group for metrics design and the Executive Office and Leadership Team for organization structure.

The phase will conclude with a release of the full Board of Directors-approved plan at the Openlands Annual Luncheon in October 2025. The Openlands Executive Office and Leadership Team will approve the draft final plan that goes to the full Board of Directors for adoption. Openlands will lead plan production, design, distribution, and communications.

IMPORTANT: The proposal from the consultants will convert these three conceptual phases into a scope of work that outlines a realistic and practical sequence of interrelated activities with clear actions, timelines, convenings, milestones, and deliverables. The phases may overlap. With an average annual operating budget between \$6MM and \$8MM, Openlands must have a strategy it can afford. Also, thoughtful stakeholder engagement and information gathering is a necessity, but unnecessary or excessive process is not what Openlands is looking for. The scope of work should include one Leadership Team/Board sub-committee convening, an all-staff retreat, one full Board of Directors convening, and other convenings for internal/external audiences, as appropriate. The consultants will organize and facilitate all convenings with support from the Openlands Executive Office, as appropriate.

Internal audiences:

- Board of Directors: 27 civic and conservation leaders
- Board sub-committee: 3 - 5 members of the Board of Directors with expertise in strategy
- Executive Office: President and CEO, Chief Operating Officer, Executive Administrator and Board Liaison, Kellogg Board Fellow
- Leadership Team: President and CEO, Chief Operating Officer, Executive Administrator and Board Liaison, Vice President of Conservation and Policy, Director of Finance and Accounting, Director of Development, Director of Administration, Director of Communications, Director of Human Resources
- Program Directors: Director of Policy, Director of Education, Lake County Director, Director of Forestry, Director of Restoration and Trails, Conservation Attorney
- Staff: 47 passionate professionals committed to the Openlands mission
- Data Infrastructure Working Group: Internal working group of Openlands staff with data expertise

Timeline

The consultants will commence strategic planning work on December 1, 2024, and deliver the final plan document, performance metrics, and a proposed draft organization structure for plan implementation, by September 1, 2025. Some activity may happen beyond this date as Openlands prepares to announce its new five-year strategy at the Openlands Annual Luncheon in late October 2025. Within the nine-month timeframe, the consultants will create workplans, timelines, and a project management process

for the three phases outlined in this request for proposals.

Up to three final candidates will receive complimentary invitations to attend the Openlands 2024 Annual Luncheon at Hilton Chicago on October 17, 2024. Openlands will not pay travel costs. Attendance is not mandatory.

Budget

Openlands will consider proposals with budgets up to \$210,000 (professional fees only; Openlands will cover expenses for stipends, retreats, convenings, and the like). Pro bono services may be included as a portion of the budget.

Proposal and Selection Process

Competitive proposals for the Openlands 2026 – 2031 strategic plan will include the following:

- Statement of interest (up to one page).
- Commitment statement to racially, culturally, and politically diverse perspectives (up to one page).
- Formal proposal, of an appropriate length, which includes the three phases outlined in this document. Proposal format is up to the applicant. Proposal may be a blend of narrative, charts, graphics, and tables. An important selection criterion for Openlands is an easy-to-understand proposal.
- Detailed budget, budget narrative, and billing structure.
- Professional credentials of the consultant or consulting team, including subcontractors. Openlands will need to approve subcontractors prior to the project start date.
- Professional references (up to three).

Proposals are due Monday, October 7, 2024, to Patrick Schlomas at pschlomas@openlands.org.

Openlands will select up to three final candidates by Friday, October 11, 2024. Interviews will occur in late-October for a decision by November 15, 2024. Women and minority-owned businesses are encouraged to submit. For questions about this request for proposals, please contact Openlands Chief Operating Officer Daniella Pereira at dpereira@openlands.org.