



**Terms of Reference - Strategic Planning Consulting Support  
Jane Goodall Institute of Canada**

**Context / Background**

The Jane Goodall Institute of Canada (JGIC) is seeking an external consultant to submit a proposal for the provision of guidance and subject matter expertise in the development of a strategic plan and to work with JGIC's Board and senior management to produce a multi-year strategic plan. The current strategic plan ends in June 2025.

Founded in 1993, the JGIC is the Canadian chapter of a dynamic global network of Jane Goodall Institutes around the world. Inspired by the vision of our founder, our vision is a healthy planet where people make compassionate choices to live sustainably and in harmony with each other, the environment, and other animals. In Africa, we oversee community-centred conservation projects, working to improve the lives of local communities while also protecting key areas of habitat for chimpanzees. In Canada, our Roots & Shoots program empowers young people to take action that improves the wellbeing of animals, people, and the environment. The JGIC also supports Indigenous-led initiatives to tackle environmental inequity, biodiversity loss, and climate change.

The Jane Goodall Institute of Canada is at a pivotal moment, and the external political, social, environmental context changes are impacting how we work. The Strategic Planning process aims to review our current programming and impact, while identifying additional opportunities to expand our impact both in *Chimpescapes* across Africa and in Canada. We want to explore opportunities to increase brand recognition, engagement with JGIC as an organization (beyond followers of Jane Goodall), and diversifying our revenue/fundraising.

**Objectives**

JGIC is looking for consultant(s) to support all or a portion of the following activities with the Board of Directors:

- Design an appropriate yet robust strategic planning process with the inclusion of various stakeholders, including programming partners, strategic partners, JGIC staff and Board of Directors as well as an external environmental scan (including peer organizations), and internal strengths, weaknesses, opportunities, and threats (SWOT) analysis.
- The consultant(s) will work closely with the CEO, Management Team, staff, and Board of Directors to design a specific process for engagement with Indigenous partners and other Canadian partners to review the current Canada Programs strategy and evaluate options for JGIC to increase programming and relevancy in Canada.
- Develop a strategic framework that includes:
  - Analysis of impact of current programs and partnerships, trends in the non-profit sector (e.g., direction and control, decolonization, youth, digitalization, climate change), and advise management on future program and revenue mobilization opportunities, in-line with our mission.



- Review of program impact data with the Program Director and other program team members and identify programs and initiatives that are having the largest impact, and are effectively aligned to community priorities and those that JGIC should consider modifying or eliminating.
- Review the current Fundraising portfolios and current fundraising strategy to determine what is having the largest return on investment, present options to further inform the fundraising strategy.
- Assess/evaluate progress and success towards the current strategic plan and goals to inform strategic priorities from 2025 onwards.
- Training for the JGIC Board on “The Board’s role in strategic planning”.

## **Budget and Outputs**

JGIC is planning to run this process in two phases, and ideally the same consultant(s) would run both phases. ***Timeline - April 2024 to April 2025***

**Phase 1** is facilitating an in-person or virtual training on “The Board’s role in strategic planning” at the April 2024 Board retreat (April 19 - 20), and presenting a draft process / steps for the rest of the strategic planning process for Board and CEO input.

### **Outputs Phase 1**

- Delivery of 2-hour training and Q&A (in-person or virtually)
- Presentation on the recommended process & workplan for the strategic planning process for Board and CEO input

**Phase 2** is implementing the strategic planning process outlined in Phase 1. As outline below, would expect preliminary findings and advice/recommendations/strategic options to be presented to JGIC for feedback, reflection, and analysis, followed by a draft written report for comment, and subsequently the final report.

### **Outputs Phase 2**

- Kick-off meeting
- Background Review and high-level summary report
- Delivery of the engagement process as outlined in the proposal / phase 1
- In-Person Strategic Session - present summarised preliminary findings and strategic options, and facilitating a strategic planning workshop at the November 2024 Board retreat (in Toronto, Ontario) with the Board of Directors, CEO and Management team
- Outline of the strategic framework and ‘strategic options’ presentation to the Board, Senior Management, and CEO
- Draft Strategic Framework and strategic plan for review, comments by the Board of Directors and the CEO by February 2025
- Final Strategic Framework / Plan approval by the board at the Board retreat in April 2025



# Jane Goodall Institute Canada

The final Strategic Framework should include:

- Executive Summary
- Environmental scan
- Analysis of JGIC's programming and partnerships in Canada and overseas, brand awareness, and fundraising / revenue generation
- An analysis of qualitative and quantitative data and sample quotes from interviews.
- Recommendations on strategic options - impact statement, strategic pillars / priorities, related goals and objectives, and recommendations for evolution or changes to program, revenue generation/fundraising, brand development, and feasible timeline for implementation

## Qualifications

- Experience in strategic planning and visioning, and strategic planning for non-profit organizations.
- Experience with qualitative and quantitative data analysis.
- Experience with participatory facilitation methodologies for a variety of different stakeholders.
- Successful facilitation experience using virtual platforms.
- An understanding of international cooperation, community centred conservation, decolonization and partnerships with Indigenous organizations would be an asset.
- Exceptional communication skills, and ability to convey complex ideas in clear and accessible language to support the Board, staff, and stakeholders.

## Submission Guidelines

We invite consultants to submit a draft budget and expressions of interest for discussion, with clear costs for Phase 1 and a draft budget and workplan for Phase 2. The initial contract would be for Phase 1, and the remainder of the contract would be agreed after Phase 1 is completed. Total costs should not exceed \$50,000 for the full project (phase 1 + 2).

Expressions of interest should include:

- A letter (2 pages maximum) describing your interest in this mandate, the approach you would take and process you would follow, and your experience undertaking comparable projects
- CV(s) of the lead consultant(s)
- A draft budget for Phase 1 and Phase 2

We are open to submissions from single consultants as well as teams. Please send your expression of interest to [info@janegoodall.ca](mailto:info@janegoodall.ca), with "Strategic Planning Proposal" in the subject line. **Deadline to apply is March 31, 2024.**

JGI Canada is committed to the principle of equal opportunity and does not discriminate based on race, national or ethnic background, religion, age, gender identity, sexual orientation, family status, or disability. We encourage candidates from underserved or historically marginalized groups to apply. If you face barriers related to your intersectional identities and want to inquire about individualized application support, please contact us at [info@janegoodall.ca](mailto:info@janegoodall.ca).