



## **Request for Proposals: Building for Scale: Modernizing Systems with Responsible AI**

### **About Rare**

Rare is a global leader in community-led solutions to protect nature, fight climate change, and build resilient communities. With an annual operating budget of approximately \$40 million and more than 240 staff working in 10 countries, we empower people around the world to adopt sustainable practices, restore ecosystems on land and at sea, and strengthen their livelihoods — ensuring people and nature thrive together.

Rare's 2040 vision is a world in which billions of people in the most biodiverse and climate-vulnerable regions thrive through increased community and ecosystem resilience. In pursuit of this vision, Rare's 2030 Strategy focuses on scaling community-led solutions that strengthen resilience across land and ocean systems.

### **Strategic Context**

As part of its 2030 Strategy, Rare is investing in modernizing its operational systems and ways of working to function as a tech-enabled cohesive, adaptive, and scalable organization. This includes simplifying workflows, reducing manual effort, strengthening use of shared platforms, and thoughtfully leveraging AI so teams can focus more fully on delivering impact.

Rare seeks a strategic, hands-on partner to support the design, sequencing, and implementation of tech-enabled integrated enterprise systems, grounded in a clear understanding of how Rare wants to operate now and in the future.

### **Scope of Work**

This engagement will be grounded in a lightweight enterprise architecture perspective, ensuring that process, system, and data decisions are made holistically rather than function by function. The partner will support and implement improvements in core operational systems, listed below, as prioritized by Rare in partnership with the consulting partner.

This RFP reflects Rare's current assessment of the scope and requirements of this engagement. We welcome respondents' perspectives and recommendations based on industry best practices, including proposed refinements that would strengthen outcomes.

An additional Scope of Work titled "Rare's Digital Workspace RFP" has been included in Appendix 2. For all consultants who have the capability to address the needs in that scope, please include this work in your response. If you do not have the capabilities to address those needs, please note that you are only responding to Rare's Tech & AI Enabled Enterprise and Architecture RFP.

### **Talent (i.e., Human Resources)**

- Core HRIS and employee data
- Payroll and benefits (including country-specific considerations)
- Talent acquisition and onboarding
- Performance management
- Learning and development
- HR reporting and analytics



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## Finance and Accounting

- General ledger, AP/AR, budgeting, and forecasting
- Multi-entity and multi-currency accounting
- Expense management
- Financial reporting, audit support, and internal controls

## Global Operations and Risk Management

- Staff Safety and Travel Risk Management

## Donor and Grants Management

- Donor relationship management
- Grant lifecycle management (pre-award through closeout)
- Restricted and unrestricted fund tracking
- Donor and funder reporting
- Integration with finance and reporting systems

## Technology

- Adoption of Microsoft 365 as Rare's standard digital workplace for shared storage, communication, and collaboration tools

## Cross-Functional Workflows

- Data visibility and reporting
- Operations ticketing systems and workflows

## Engagement Phases & Deliverables

The work will progress across three phases to enable learning, momentum, and early wins. *Appendix 1 provides a representative overview of the operational systems currently in use at Rare.*

### Phase 1. Discovery & Current State Assessment

The purpose of this phase is to establish a shared, decision-relevant understanding of the current environment. The phase will build on prior work already conducted by Rare to:

- Leverage existing documentation, assessments, and team inputs
- Clarify priorities, constraints, and success criteria
- Confirm stakeholder alignment around a shared understanding of opportunities, needs, and tradeoffs

#### Phase 1 Deliverables:

1. Current-State Systems & Process Summary: A concise overview of existing core processes, systems, integrations, and pain points across both central and country office operations, spanning Talent, Finance, Development, Technology, and cross-functional workflows to inform decision making. Note:



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2. Key Findings & Opportunity Assessment: A synthesized view of the highest-value opportunities for simplification, automation, integration, and AI enablement with a clear articulation of trade-offs and constraints.

## **Phase 2. Target State Enterprise Architecture Development**

This work will be conducted in close partnership with internal teams to ensure the target-state architecture and roadmap are practical, grounded in operational reality, and aligned with Rare's strategic priorities.

This phase will include:

- Establishing guiding design principles (e.g., global consistency with local flexibility, SaaS-first, user-centered design) to anchor all decisions
- Documenting and refining current-state processes and designing future-state processes that are simpler, more integrated, and scalable
- Identifying opportunities to streamline workflows, reduce manual effort, and improve clarity and efficiency
- Translating future-state processes into clear functional and technical requirements
- Applying a lightweight enterprise architecture lens to provide shared clarity on:
  - Core business capabilities
  - System roles and responsibilities
  - Data domains, ownership, and reporting principles
  - Key integrations and dependencies
- Supporting decisions on new system selection, existing systems enhancement or retirement, and sequencing
- Developing a prioritized, phased implementation roadmap that balances foundational design with opportunities for early progress
- Identifying critical, core operational data and establishing systems of record

### **Phase 2 Deliverables:**

1. Current State and Target-State Operating & Systems Model: A clear description of how Rare currently operates alongside how Rare intends to operate in the future, including:

- Current State Architecture: A architecture diagram for Rare's current operations in a reasonable modeling language/toolkit that will enable Rare to monitor/maintain the results after the engagement is completed.
- Future State Architecture:
  - Core business capabilities
  - Core business processes by function
  - Role of major systems (HRIS, finance, Salesforce, Microsoft 365, etc.)
  - High-level integration and workflow flows
  - Major data domains and ownership

2. System Selection & Sequencing Recommendations: Clear recommendations on:

- Systems to implement, enhance, retire, or defer
- Sequencing logic and dependencies
- Buy vs. build considerations where relevant

3. Prioritized Implementation Roadmap: A phased roadmap (near-, mid-, longer-term) that includes:



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- Key initiatives and milestones
- Dependencies and sequencing
- High-level effort and cost considerations
- Risks and mitigation strategies

### **Phase 3. Enterprise Architecture Implementation and Adoption**

The partner will support implementation and sustained adoption of selected systems and processes, including:

- System configuration, integration, and rollout
- Risk identification and mitigation planning
- Organization-wide adoption of Microsoft 365
- Transition from legacy tools and processes
- Training, enablement, and learning support
- Establishment of governance, roles, and accountability mechanisms
- Measurement of adoption, usage, and operational outcomes

Implementation will be staged and adaptive, with a focus on delivering visible value early while building long-term capability.

### **Phase 3 Deliverables**

1. Implementation & Integration Plans: Practical plans covering:

- Configuration and integration approach
- Rollout sequencing
- Key roles and responsibilities

2. Adoption, Usage & Outcome Metrics Framework: A small, focused set of measures to track:

- System adoption and usage
- Process efficiency gains
- Early operational outcomes

### **Phase 4. Change Management and Capability Building**

Change management and capability building are core to this engagement and will be embedded throughout all phases. The partner will work closely with Rare's Learning & Development team to:

- Support teams through transitions to new systems and ways of working
- Develop a change approach tailored to a global nonprofit context
- Provide training and enablement that reinforces accountability and consistent use
- Build internal capability to sustain and evolve improvements over time

### **Phase 4 Deliverables:**

1. Change Management & Enablement Plan: A change and learning plan developed in partnership with Rare's Learning & Development team that includes:

- Stakeholder engagement strategy
- Training and enablement approach

### **Cross-Cutting Deliverables:**

1. Executive Level Materials: In addition to the deliverables defined across phases, the partner will produce concise, executive-level summaries designed for leadership and Board use. These materials will clearly articulate key recommendations and tradeoffs, investment implications, and decision points requiring executive approval and Board engagement.



## **Engagement Approach and Governance**

This engagement will be highly collaborative and governed through clear decision-making authority and accountability. Rare will establish an internal operating structure to ensure timely decisions, effective coordination, and disciplined execution.

The **Core Leadership Team** will consist of three to four individuals with delegated decision-making authority across internal systems, learning and development, and change leadership. This team will manage day-to-day governance, coordinate with the consulting partner, incorporate stakeholder input, and make cross-functional decisions needed to maintain momentum and scope discipline.

The **Executive Experts Team** will include four to five senior leaders from Finance, Talent, Development, Technology, and Programs. This group will provide strategic and technical guidance, validate recommendations, and make final decisions for function-specific priorities, tradeoffs, and implementation impacts within their respective areas.

Together, these groups will ensure clear ownership, rapid decision-making, and sustained accountability throughout the engagement. A broader group of program and operations leaders will be intentionally engaged throughout this process.

## **Consulting Partner**

Rare is seeking a strategic, hands-on partner to help design, sequence improvement, select new systems, and implement improvements across core operational systems, while building internal capability and supporting sustainable organizational change.

We are seeking a partner with expertise in:

- Operational and process design
- Enterprise systems integration and implementation
- Human resources and financial management processes and systems
- Nonprofit operations in global contexts
- Change management and organizational capability building

## **Proposal Requirements**

Interested firms should include the following in their proposal:

- An overview of the firm's approach to this engagement
- A proposed phased structure, timeline, and budget range
- Key team members, roles, and relevant experience
- 2–3 examples of relevant engagements and client references

Submission timeline:

- **Submission Deadline: Monday, March 9** Close of Business
- **Virtual Interviews:** Week of March 23 (interviews will be tentatively scheduled at time of submission)
- **Selection Made:** Week of March 30

Questions regarding this RFP may be directed to: **Renee Baiorunos**, [rbaiorunos@rare.org](mailto:rbaiorunos@rare.org)



## **Appendix 1: Current Systems Landscape (Representative Summary)**

Rare currently uses a range of enterprise platforms to support its operations, including systems for finance, human resources, development, collaboration, and data (e.g., Salesforce, Microsoft 365, HR and payroll tools, and financial management systems). The list below is a starting point to provide a sense of the systems Rare is currently deploying.

The selected partner will be expected to work within this environment, supporting improved alignment, integration, and adoption, along with identification and selection of new systems where warranted.

### **Talent / HR Systems**

- ADP (U.S. payroll)
- SuccessFactors (performance management)
- iCIMS (recruiting)
- LearnUpon and iSpring (learning & development)

### **Finance Systems**

- DataBasics (vendor payment requests, expense management and time tracking)
- Intacct (accounting system)
- Martus Tools (budgeting, financial reporting)
- Excel-based budgeting and reconciliation

### **Development and Grants Management**

- Salesforce for donor management
- Decision made to use Salesforce for grants management, implementation not yet started

### **Global Operations and Risk Management**

- Staff Safety and Travel Risk Management. Decision made to use International SOS, implementation not started

### **Project Management, Data, and Collaboration Tools**

- Asana and Smartsheet used inconsistently across teams (note: Rare has a stated goal to phase out Smartsheet)
- Tableau and a planned transition to Power BI
- Egnyte being replaced by SharePoint for file storage
- Ongoing transition to Microsoft365 tools for communication and collaboration



## Appendix 2: Digital Workspace RFP: Microsoft 365, SharePoint & Migration Partner

### Purpose

Select a partner to provide an end-to-end solution: designing the Microsoft 365 architecture, leading Organizational Change Management (OCM), and data migration from Egnyte and other legacy sources. The goal is to deliver a modern, populated, and adopted Digital Workplace.

### Current Landscape

- **Data Volume:** ~24 Terabytes total.
  - **Primary Source:** ~22 TB in Egnyte (Complex permissions and folder structures).
  - **Secondary Sources:** ~2 TB distributed across Google Drive, Slack, Microsoft Teams, and OneDrive.
- **User Base:** Global usage across Asia Pacific, Latin America, Africa, Europe, and the US.
- **Key Challenge:** We need to move from a "folder-heavy" structure in Egnyte to a modern Information Architecture in SharePoint/Teams. We are looking for a strategy to identify and migrate only active value while archiving the rest in a read-only repository.

### Scope of Services

#### 1. Architecture & Governance

- **Tenant & Security:** Establish security baseline across Entra ID (Azure AD) and M365.
- **Information Architecture (IA):** Design Hub sites, libraries, and taxonomy.
- **Auto Tagging:** Implement auto-tagging and AI-driven content processing to automate metadata application. We want to reduce manual tagging efforts while drastically improving searchability.
- **Teams Governance:** Define the model for provisioning, naming conventions, expiration policies, and external collaboration controls.
- **Modern Workflows:** Identify high-value opportunities to replace manual "email + attachment" processes with Power Automate and Planner.

#### 2. Migration Execution (The "Smart" Lift)

- **Filtered Migration Strategy:** We are looking for an "**Active vs. Archive**" strategy. The partner must assist in defining cut-off criteria to ensure we only migrate relevant content to libraries.
- **Archiving Solution:** Propose a strategy for the remaining historical data (e.g., Azure Cold Storage or a low-cost archive tier) to ensure compliance without cluttering the new environment.
- **Complexity Management:**
  - Mapping Egnyte permissions to M365 equivalents.



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- Mapping Egnyte metadata/tags to SharePoint Term Stores.

### 3. Organizational Change Management (OCM)

- **Adoption Leadership:** Envisioning sessions with stakeholders, change strategy, and global communications plan.
- **Enablement:** Training sequence, quick reference guides, and "Train the Trainer" sessions with our L&D team.
- **Co-Design:** Workshops with program leads to ensure the new architecture fits their actual workflows.

### 4. Tech Team Enablement & Operational Handoff

- **Admin Awareness Training:** Deep-dive technical sessions for the internal IT team on maintaining the new environment. This must cover "Day 2" operations, troubleshooting permission issues, and managing the lifecycle policies.
- **Service Desk Readiness:** Specific training for Helpdesk staff to handle common user requests (e.g., "I can't find my file," "How do I share externally") in the new SharePoint/Teams context.

### Key Deliverables

- **Architecture Blueprint:** Complete design of the Hub/Site topology and Governance policies.
- **Migration Execution:** Validated transfer of *active* data with error logs and success reports.
- **Archive Repository:** Establishment of a searchable archive for historical data.
- **OCM Assets:** Communications kit, training decks, and adoption roadmap.
- **Admin Handoff Package:** Recorded technical training sessions, operational runbooks.
- **Security Configuration:** Recommendations of DLP, Retention, and External Sharing policies.

### Timeline Targets

- **Discovery & Planning:** Weeks 1-4.
- **Architecture & Pilot:** Months 2-3.
- **Phased Migration Execution:** Month 4 onwards (Phased approach by department/region).

### What to Include in a Response

- **Capability Summary:** Specific focus on **Egnyte-to-SharePoint** migration experience.



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- **Filtering Methodology:** How do you analyze ROT (Redundant, Obsolete, Trivial) data? What is your approach to "cut-off" dates?
- **Content Intelligence:** Experience with SharePoint Syntex or other auto-tagging solutions.
- **Team Structure:** Roles for Architects, Migration Engineers, and OCM Leads.
- **Budget Guidance:** Estimated range for Professional Services vs. Migration Services.
- **References:** Two similar client references (preferably 10TB+ scale).