



Request for Proposals: Microsoft 365 Phase 2 Migration Partner

1. RFP Overview

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 more than \$45 million and more than 250 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.

As part of our broader technology modernization efforts, Rare has started a digital workplace transformation to consolidate its collaboration and content management tools onto Microsoft 365. Rare completed Phase 1 of this program, delivering data discovery and content mapping, information architecture, permissions and governance model, training foundations, and pilot migration of three departments. We are now initiating Phase 2 to execute full-scale migration across the remaining organization and complete standardization of the environment.

This RFP invites qualified vendors to propose execution of Phase 2 migration deliverables against an architecture and governance model that has already been designed and validated. This RFP defines the scope of work, the outcomes Rare expects, and the criteria that will guide vendor selection.

2. Current Environment and Scope

2.1 Current Environment

Rare's digital workplace currently spans three different storage, collaboration, and sharing platforms. Egnyte serves as the primary institutional repository, while some program teams also use Google Drive and Microsoft 365 tools. Phase 2 will create a more consistent organization-wide approach to file storage, permissions, collaboration, and governance.

Rare's future state is a more consistent Microsoft 365 environment built on SharePoint Online, OneDrive, Teams, and a structured intranet experience. Phase 1 of this work established the team site information architecture, owners/members/visitors permissions model, governance approach, and pilot migration for three departments. Phase 2 will build on that foundation by migrating additional departmental content, standardizing

collaboration spaces, and defining the intranet structure needed to support navigation, communications, and content ownership.

Current platforms include:

- **Egnyte:** Rare's legacy institutional storage platform, containing approximately 20TB of data with complex nested folder structures and permissions.
- **Google Drive:** Used by some program teams for file storage and collaboration, with roughly 2TB of additional content to be migrated.
- **Microsoft 365:** SharePoint, OneDrive, and Teams are already in use to varying degrees, but the environment requires broader standardization and consistent governance.

2.2 Phase 2 Scope

Rare is seeking a partner to build on the solid foundation build in Phase 1 and execute Phase 2 of the Microsoft 365 migration and standardization effort. The selected vendor will work in close and active partnership with Rare's Vice President of Technology, internal Technology team, and change management team, leveraging existing discovery, governance decisions, and organizational context to support the migration execution. Please note in the proposal any expectations of what the Rare team will own versus what the vendor team will own.

Phase 2 is expected to include approximately 26 team sites and 7 hub sites, with final counts to be refined through content mapping.

The anticipated scope includes:

- Plan and execute migration of remaining departmental and shared content from Egnyte and selected Google Drive locations into Microsoft 365.
- Configure SharePoint, Teams, and OneDrive structures needed to support the migration and standardize collaboration across departments.
- Lead content mapping, cleanup, migration validation, permissions review, exception handling, and cutover planning.
- Help define the remaining intranet structure, including home site, hub site relationships, navigation, and content ownership expectations.
- Provide documentation, handoff materials, and post-migration stabilization support for Rare's Technology team.

3. Vendor Qualifications

Rare seeks a vendor with demonstrated experience executing Microsoft 365 migration, SharePoint, Teams, and OneDrive standardization, and intranet planning efforts for organizations of similar size and complexity. The selected vendor must support migration execution and intranet structure within Rare's existing collaboration architecture and permissions model.

Vendors should demonstrate qualifications in the following areas:

- **Microsoft 365 migration execution:** Experience migrating content from legacy cloud storage platforms such as Egnyte, Google Drive, file shares, or comparable repositories into SharePoint Online, OneDrive, and Teams.
- **SharePoint, Teams, and OneDrive expertise:** Practical experience implementing standardized collaboration environments, including the relationship between SharePoint sites, Teams workspaces, shared files, individual storage, and collaboration practices.
- **Intranet planning and governance:** Experience supporting SharePoint Online intranet planning, including home sites, hub sites and navigation in alignment with broader digital workplace standards.
- **Permissions and content complexity:** Experience managing permissions, nested folder structures, content cleanup, mapping, validation, exception handling, and user access changes during migration.
- **Execution within an established framework:** Ability to execute against Rare's existing team site architecture and permissions model while helping define remaining intranet structure and user experience needs.
- **Global or distributed workforce experience:** Experience supporting organizations with staff across multiple locations, time zones, and levels of Microsoft 365 maturity.

Vendors should identify the proposed project team. Responses should describe each team member's relevant experience, certifications, expected role, and estimated level of involvement.

Vendors should provide examples of comparable Microsoft 365 migration or digital workplace engagements, including the size and complexity of the environment, source systems migrated, major deliverables, timeline, and outcomes. Rare may request references from organizations with similar migration, governance, or global collaboration needs.

4. Proposed Approach, Timeline, and Deliverables

Vendors should provide a clear proposed approach for executing Phase 2 within an anticipated 16-week timeline, including how they will plan, manage, and deliver the work and what they expect the Rare team to own and manage.

Proposed project approach and methodology:

- 16-week timeline, sequencing, and major milestones
- Content mapping and migration planning approach
- SharePoint, Teams, OneDrive, and intranet configuration approach
- Validation, cutover, and stabilization approach
- Key deliverables by phase
- Assumptions, dependencies, and required Rare decisions
- Proposed division of responsibilities between Rare and the vendor

Note: Rare will have a 2 week pause in this project mid-December through early January. These 2 weeks should not be included in the 16-week timeline and pricing.

5. Pricing

Vendors should provide pricing for the core Phase 2 migration scope within the anticipated 16-week timeline and separately identify pricing for intranet planning, structure, and related advisory services. No travel is expected for this engagement. Vendors should clearly describe what is included in each pricing component, what is optional, how the work will be billed, and any assumptions tied to the proposed pricing.

6. Submission Instructions

Interested vendors should submit a proposal that includes their proposed approach, 16-week timeline, pricing, proposed project team, relevant experience, and examples of comparable Microsoft 365 migration engagements.



The schedule for this RFP is as follows:

RFP published	Friday, September 11, 2026
Vendor proposals due	Friday, September 25, 2026
Vendor interviews	Week of October 5, 2026
Vendor selection	Week of October 12, 2026
Anticipated engagement window	Late October 2026 through February 2027

Questions regarding this RFP may be directed to Ron Thomas (Rthomas@rare.org). Rare may invite selected vendors to participate in follow-up conversations or virtual interviews before making a final selection.