

REQUEST FOR PROPOSALS

*TECHNOLOGY NEEDS, OPERATING MODEL OPTIONS,
AND IMPLEMENTATION ROADMAP*

RFP status	Published
Anticipated budget	Up to \$75,000 for consulting services
Desired start	As soon as practicable
Proposal deadline / contact	Friday, Nov 6, 2026

Engagement objective: Give SCF a rigorous, actionable basis for determining how technology services, systems, responsibilities, and decision rights should be structured among SCF, Sierra Club, and any outside providers—and how to implement the recommended model securely and effectively.

SCF welcomes proposals from independent consultants, firms, and integrated teams of varied sizes and backgrounds. We particularly encourage participation by firms owned or led by people from communities historically underrepresented in the technology and consulting fields.

1. ABOUT SIERRA CLUB FOUNDATION

Sierra Club Foundation (“SCF” or the “Foundation”) is an independent 501(c)(3) public charity with 11 employees working in a hybrid, geographically distributed environment across the United States. SCF is legally distinct from Sierra Club (the “Club”), a much larger 501(c)(4) organization, while maintaining important operational relationships with the Club. Those relationships currently include shared or Club-provided human resources, information technology and network support, digital strategies, communications, facilities, and access to certain enterprise systems. Before issuance, SCF may provide additional scale indicators—such as annual operating budget, grant volume, and active donor count—to help bidders calibrate their approach.

SCF’s small scale, distinct mission, and close operational relationship with the Club create both opportunities and complexities. SCF seeks to understand how its technology needs can best be met while supporting staff productivity, protecting its data and relationships, managing risk, and preserving effective collaboration and interoperability with the Club.

2. PURPOSE AND DESIRED OUTCOME

SCF seeks a consultant or consulting team to evaluate its workflows, technology needs, business systems, support arrangements, information governance, and cybersecurity posture; assess a range of viable future-state scenarios without a predetermined conclusion; and produce a practical, sequenced roadmap. The engagement should move beyond a conventional inventory of devices and licenses and connect technology choices to staff productivity, organizational governance, risk, collaboration, and SCF’s stewardship of institutional relationships and information.

The central question: What technology operating model will best meet SCF’s needs while supporting a strong, effective working relationship with Sierra Club?

OBJECTIVES

- Reduce the compounding staff-time burden created by manual workflows, fragmented systems, delays, duplicate entry, and workarounds.
- Mitigate cybersecurity, privacy, records-retention, e-discovery, access-control, and business-continuity risks.
- Determine the most effective allocation of systems, services, responsibilities, and decision rights among SCF, the Club, and any outside providers.
- Enable responsible, secure adoption of AI and other productivity tools.
- Produce decisions, cost estimates, vendor options, transition requirements, and an implementation sequence that SCF can act on promptly.

3. CONTEXT: CURRENT SHARED-SERVICES ARRANGEMENT

An amended services cost-sharing agreement effective October 1, 2020 governs several categories of services provided by the Club to SCF, including information technology and network support. The agreement and related operating practices will be provided as background so the consultant can understand the current service environment, systems, permissions, data relationships, and practical dependencies. The consultant will not be asked to interpret the agreement, evaluate compliance, reconcile services or invoices, assign responsibility, or provide legal advice.

Both organizations are operating amid significant demands and resource constraints, and SCF's technology needs have evolved over time. SCF wishes to take a constructive, progressive look at its workflows and requirements and at the arrangements most likely to serve both effective collaboration and SCF's operational needs.

4. SCOPE OF WORK

SCF expects the work to proceed in decision-oriented phases, with early findings delivered as they become actionable. Bidders may refine the sequence, but proposals should address all workstreams below.

PHASE 1 — DISCOVERY AND BASELINE ASSESSMENT

- Interview SCF staff and, if/where useful and authorized by SCF, relevant Club personnel.
- Inventory systems, applications, licenses, devices, vendors, data stores, integrations, identities, permissions, support channels, contracts, and informal dependencies.
- Map priority workflows—including document routing and internal approvals—and quantify material burdens from delays, duplicate entry, manual processing, unclear ownership, and staff workarounds.
- Document current support capacity, service channels, escalation routes, costs, operational risks, unmet needs, and the practical consequences for SCF's work.
- Map the operational and technical dependencies associated with shared services, including the access, information, decisions, and cooperation that each future-state scenario would require from the Club.
- Identify quick, low-risk improvements that SCF can pursue without prejudging the long-term operating model.

PHASE 2 — FUTURE-STATE SCENARIOS AND RECOMMENDATION

At minimum, evaluate the following scenarios:

- Strengthened shared-services model: retain broad Club linkages while identifying the capacity, responsibilities, service expectations, escalation pathways, permissions, governance, and investments needed for the arrangement to meet SCF's needs effectively.
- Hybrid or selectively supplemented model: retain substantial shared services and interoperability while SCF or outside providers assume responsibility for selected applications, data domains, support functions, or vendor relationships.

- More independent model: establish a substantially separate SCF technology environment and support structure while defining the collaboration and interoperability that should continue.
- For any recommended scenario, identify whether a phased transition or pilot would reduce risk, preserve business continuity, or allow assumptions to be tested before larger commitments are made.

For each scenario, address benefits, constraints, dependencies, transition complexity, security, user experience, governance, staffing, vendor needs, three- to five-year total cost of ownership, and hidden costs such as staff time, delayed work, foregone capability, and relationship or reputational risk.

PHASE 3 — TARGET ARCHITECTURE AND IMPLEMENTATION ROADMAP

- Recommend a fit-for-purpose target operating model and system architecture for an 11-person organization.
- Define required interoperability, data exchange, identity, access, security, retention, and potential offboarding arrangements with the Club.
- Prioritize initiatives by urgency, value, risk, effort, sequencing dependencies, and reversibility.
- Provide realistic implementation budgets, timelines, procurement options, migration requirements, change-management needs, and accountable owners.
- Identify vendor categories and, where appropriate, specific shortlists and selection criteria without steering SCF toward products from which the bidder benefits.
- Identify the participation, coordination, capacity, and resourcing required from SCF, the Club, and outside providers to implement each viable scenario successfully.

PRIORITY WORKSTREAMS

Workstream	Questions to answer	Expected output
Relationship and constituent data	Can SCF safely steward programmatic, donor, partner, and institutional relationships without unwanted access or indiscriminate communications? Should shared Salesforce architecture be repaired, segmented, supplemented, or replaced for defined uses?	Data-governance model; CRM options; permissions and communications controls; migration/integration implications.
Finance and administration	How should SCF simplify expense reporting, cards, document routing and internal approvals, timekeeping, donation intake, stock-gift reconciliation, endowment allocations, subscription and contract tracking, and financial visibility?	Prioritized workflow redesign; integration map for NetSuite and related tools; tool and automation recommendations; cross-functional reporting requirements spanning finance, fundraising, operations, and programs.

Workstream	Questions to answer	Expected output
AI enablement	How can SCF securely deploy enterprise AI, meeting-assistance, and embedded AI capabilities within SCF's governance and risk tolerances, including appropriate handling of sensitive information and human review?	Secure enablement plan; approved-use architecture; administration, training, support, and cost requirements.
Collaboration and knowledge	How should SCF manage projects, schedules, institutional knowledge, documents, naming/version conventions, litigation holds, records retention, and e-discovery?	Information architecture; governance and retention practices; platform recommendations and migration needs.
Board operations	What approach will provide secure, low-friction onboarding, document sharing, archives, annotations, voting/polls, committee work, and offboarding for volunteer directors?	Comparison of a repaired Google-based approach with purpose-built board portals; accessibility, support, security, migration, and cost analysis.
Digital presence and communications	What capabilities and ownership model are needed for SCF's website, social accounts, email marketing, embedded donation pathways, digital archiving, and access continuity?	Ownership and access model; modernization priorities; security and business-continuity recommendations.
Support, devices, and security	What support model should govern endpoints, mobile sessions, remote lock/wipe, patching, account provisioning, authentication, incident response, personal-device use, training, and tabletop exercises?	Cybersecurity and support baseline; prioritized controls; incident and continuity plan; managed-service requirements.

5. REQUIRED DELIVERABLES

- Executive findings and recommendation suitable for SCF management and, if requested, the Board.
- Current-state inventory and dependency map covering systems, data, integrations, vendors, contracts, identities, permissions, support, and relevant Club linkages.
- Workflow and pain-point assessment identifying material productivity costs and operational risks.
- Scenario comparison with explicit decision criteria and 3- to 5-year total-cost analysis.

- Recommended target operating model, governance structure, and allocation of responsibilities among SCF, the Club, outside providers, and internal system owners.
- Target architecture and data-governance recommendations, including interoperability, access, retention, migration, offboarding, and an approach to reporting across finance, fundraising, operations, and programs.
- Cybersecurity and privacy risk assessment with prioritized, proportionate remediation recommendations. Any formal assurance, penetration testing, or legal review should be separately identified.
- Prioritized roadmap divided into immediate actions, foundational changes, and later improvements, with costs, dependencies, owners, and realistic timelines.
- Implementation-ready requirements and vendor-selection materials for priority initiatives, plus assistance evaluating providers if included in the proposed scope.
- Transition and change-management plan, including staff training and continuity safeguards.

6. ENGAGEMENT PRINCIPLES AND CONSTRAINTS

- Recommendations must be proportionate to SCF's size and capacity. SCF does not seek enterprise complexity transplanted onto an 11-person organization.
- The consultant must remain vendor-neutral and disclose referral fees, reseller arrangements, implementation incentives, and other conflicts.
- Security and compliance recommendations must be translated into usable practices and guidelines, not just policy documents.
- The consultant must protect confidential, donor, personnel, legal, financial, and relationship data and follow SCF-approved access and data-handling protocols.
- Implementation funding is outside the \$75,000 consulting budget. Bidders should separately identify optional implementation or ongoing managed-service work and should not presume selection for later phases.

7. CONSULTANT QUALIFICATIONS

SCF welcomes a lead firm, independent consultant, or appropriately integrated team. Strong proposals will demonstrate:

- Experience designing technology operating models for small or midsize nonprofit organizations.
- Expertise spanning business-process redesign, cloud applications, data governance, CRM, identity and access management, cybersecurity, records retention, and managed support.
- Ability to analyze shared-service arrangements and operational dependencies between legally distinct but closely connected organizations, including opportunities to strengthen collaboration.
- Experience translating technical findings for executives and volunteer boards.
- A practical orientation toward implementation, organizational adoption, and measurable efficiency gains.
- Independence from vendors or transparent disclosure and management of commercial relationships.

8. PROPOSAL REQUIREMENTS

Please provide a concise proposal addressing:

- Proposed methodology, workplan, sequencing, and opportunities for early decisions or quick wins.
- Team members, roles, relevant experience, availability, and anticipated reliance on subcontractors.
- Examples of comparable work, one or two representative sample deliverables, and two or three client references. Samples may be redacted as necessary.
- A deliverable schedule and the earliest feasible start date.
- A fixed fee or not-to-exceed budget by phase, assumptions, rates, expenses, and optional services. Identify work that can be removed or deferred without undermining the core decision.
- Expected demands on SCF staff and any required participation by Club personnel.
- Data-security practices, insurance coverage, confidentiality approach, and conflicts of interest.
- Any recommended changes to this scope, with reasons.

9. BUDGET AND COMMERCIAL STRUCTURE

SCF anticipates spending up to \$75,000 on consulting services under this engagement. Implementation, licenses, migration, and ongoing managed services may be funded separately. SCF prefers a phased structure with defined decision gates, clear deliverables, and transparent pricing. Proposals need not use the full budget. SCF may award all phases, award an initial phase with options, negotiate scope, or retain specialized providers separately.

10. ANTICIPATED PROCESS AND TIMING

Milestone	Date
RFP issued (send questions to Sara at sara.murphy [at] sierraclubfoundation.org)	Oct 20, 2026
Proposals due	Nov 6, 2026
Interviews / finalist discussions	Nov 16-20, 2026
Selection and contracting	Nov 30 - Dec 4, 2026
Desired project start	As soon as practicable

SCF may adjust this schedule and will communicate material changes to participating bidders.

11. EVALUATION CRITERIA

- Understanding of SCF's objectives and of how technology operating models affect mission, productivity, collaboration, governance, and risk.
- Relevant nonprofit and small-organization experience.
- Strength and practicality of the proposed methodology and deliverables.
- Ability to begin promptly and deliver useful findings in stages.
- Qualifications and availability of the people who will actually perform the work.
- Vendor neutrality, transparency, and absence or management of conflicts.
- Value, cost discipline, and proportionate demands on SCF and Club staff.
- Quality of references and demonstrated ability to support implementation.
- Strong preference will be given to applicants based in the United States.

12. SUBMISSION INSTRUCTIONS AND RESERVATIONS

Submit proposals electronically via this [form](#) by November 6, 2026. Questions should be directed to sara.murphy [at] sierraclubfoundation.org. SCF may request clarification, interview selected bidders, negotiate scope and price, reject any or all proposals, cancel or revise this process, and select the proposal it determines best serves SCF's interests. SCF will not reimburse proposal-preparation costs.

APPENDIX A — ILLUSTRATIVE DISCOVERY TOPICS

The following examples convey the breadth of current questions and pain points. They are not a product shopping list, a statement that every item requires a new system, or a substitute for bidder-led discovery.

Topic	Illustrative questions and examples
Enterprise AI and responsible use	Gemini or comparable enterprise tools; specialized analytical platforms; embedded AI; AI notetakers; approved tools; sensitive-data categories; human review; training; support; policy implementation.
Programmatic relationship management	Salesforce access and segmentation; protection from inappropriate mass fundraising outreach; non-Club contacts; programmatic CRM alternatives; institutional knowledge, networks, meeting history, and project status.
Finance and administration	Mobile receipt capture and coding; Ramp, Concur, Xero, or alternatives; NetSuite integration; monthly-close reminders; credit-card administration; time entry; finance dashboards; donation intake; stock gifts; endowment-interest allocation.
Work and collaboration	Asana governance; scheduling tools; Google Workspace practices; shared drives; naming and final-version conventions; document storage; login sprawl; contract and subscription tracking; DocuSign and contract management.
Board experience	Dedicated Google accounts and drives; onboarding/offboarding; secure packet distribution; committee work; annotations; archives; polls and approvals; calendar integration; purpose-built board portal options, including—but not limited to—BoardEffect or BoardVantage.
Records, legal, and risk	Email and document retention; Google Vault; litigation holds and restricted access; e-discovery; digital archives; personal devices and software; remote account/device shutdown; mobile sessions; patch timing; annual training and board updates; breach tabletop exercise.
Digital channels	Website modernization; social-media ownership and access; Mailchimp versus shared marketing platforms; embedded donation links and attribution; digital asset archives.
Equipment and support	Equipment receipts, lifecycle and maintenance records; onboarding/offboarding; endpoint management; help desk; escalation and service levels; continuity during outages or staffing gaps.

APPENDIX B — MATERIALS ANTICIPATED FOR SELECTED CONSULTANT

- Amended Services Cost Sharing Agreement between SCF and Sierra Club (effective October 1, 2020), plus any amendments or operating understandings relevant to current services, systems, access, data, or transition planning.
- Relevant SCF and Club policies, including cybersecurity, records retention, document holds, acceptable use, privacy, AI, and personal-device practices.
- Available system, license, vendor, account, device, permission, and cost inventories.
- Priority workflow examples and staff input.
- Relevant product materials already received by SCF, including the BoardEffect proposal.

END OF DRAFT