

February 6, 2026

To whom it may concern:

As part of our ongoing work to steward our mission with care and integrity, the Center for Action and Contemplation (CAC) is looking for a collaborative partner to support the next phase of our data and infrastructure work. More specifically, we are looking for a consulting firm that will perform a Salesforce data and data structure audit. We are in the process of implementing Data Cloud, with a following focus of ensuring we have a Marketing Tech Suite that will help our organization segment our constituents better.

## Scope of Work

The selected consultant will be responsible for providing a data preparedness report for Data Cloud and a new marketing tech suite, including but not limited to:

- Data and data structure analysis
  - Over 400k active contacts
  - Multiple Integrations that create the majority of new data (Shopify, Funraise, Campaign Monitor, Zapier for other platforms). We don't have a lot of Salesforce User created data. Our Constituents enter their data which then integrates into Salesforce the majority of the time
- Data structure gap analysis
- Data Cloud Readiness Recommendations/Check

## Objectives

Our objectives for this project include:

- Understanding of how our system is or isn't ready for a full Data Cloud implementation
- Understanding of what might be in the way of our Marketing Tech Suite Project moving forward

## Project Timeline

We hope to choose our partner by mid-March 2026, and they can start as soon as they are available. However, we need the findings delivered no later than the end of June 2026.

This analysis is setting us up to determine any adjustments we need to make in our Salesforce ecosystem before starting the discovery and implementation of a new Marketing Tech Suite. Without good, streamlined processes for how someone interacts

with us, a Marketing Tech Suite won't be able to easily use our data to help us segment and engage the correct people for where they are in our engagement funnel.

## Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Alignment with our objectives
- Quality and feasibility of the proposed solution
- Cost-effectiveness
- Consultant's experience with data cloud, nonprofits and value alignment
- Consultant's experience and past performance
- Project plan and timeline feasibility

## Who Is the Center for Action and Contemplation

The Center for Action and Contemplation (CAC) is a nonprofit educational organization founded in 1987 and headquartered in Albuquerque, New Mexico. Our mission is to introduce Christian contemplative wisdom and practices that support transformation and inspire loving action. CAC offers programs, publications, digital content, and online gatherings rooted in the contemplative tradition, serving a global audience of learners, donors, and long-term supporters. As our offerings and reach have grown, so has the complexity of our constituent data and engagement journeys.

Salesforce is CAC's primary CRM, and we are continuously working to strengthen our data infrastructure and marketing technology ecosystem. Our big, audacious vision is to grow our active contacts to 1 million and our reach to 7 million people. To be able to reach this goal, we need to better understand and segment our audiences, improve data quality and usability, and ensure our systems are well-positioned to support more personalized, timely, and effective communications.

## Proposal Requirements

Proposal should include:

1. **Consultant Profile:** A brief overview of you or your company, including years in business, core competencies, and relevant experience.

2. **Approach and Methodology:** Your approach to delivering the required service, including any unique methodology or technologies you will utilize.
3. **Project Plan:** Detailed plan including timelines, milestones, and deliverables. Please also include how much CAC staff time you will need to complete the project in this timeline.
4. **Pricing Structure:** Comprehensive pricing information, including any additional costs that may be incurred.
5. **References:** Contact information for at least three clients for whom you have provided similar services. You can also include case studies about certain clients if you have them in place of one reference.
6. **(Optional) Mission Alignment Statement:** What draws you to collaborate with the CAC or support our mission? What excites you about the work the CAC is doing and how you can support it through this analysis?

## Submission Guidelines

Proposals will be accepted until March 1 or until we have three quality proposals, whichever comes first. All proposals should be emailed to [rcolesullivan@cac.org](mailto:rcolesullivan@cac.org).

## Terms and Conditions

- We reserve the right to accept or reject any proposals
- Submission of a proposal does not guarantee selection

## Questions

Any questions regarding the Request for Proposals should be directed to [rcolesullivan@cac.org](mailto:rcolesullivan@cac.org).

## Conclusion

We look forward to receiving your proposal and potentially working together to achieve our objectives. Your response will be critical in helping us select the supplier that best meets our needs for this important project.

Regards,

Rebecca Cole Sullivan

CRM Product Manager