

The Golden Rules for Writing and Answering Requests for Proposals

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As a fundraising agency, we deal on a regular basis with the joys and struggles of answering Requests for Proposals (RFP's). Some organizations call them Requests for Information, some Requests for Quotes, Requests for Pricing, etc.

They can be as short as two pages or as long as 100 pages. Sometimes, they require a very specific sequence for the answers; other times, that's left to the discretion of the recipient, as long as the requested information is included.

Sometimes the RFP is looking for a bid for a single job. Other times, it includes a complicated proposal for multiple mailings or multiple media. Occasionally, RFP's require strategy and projections for 3 to 5 years and more. And, more often than not, RFP responses are expected to include so-called "spec" creative, proposed art executed specifically for the organization.

Basically, all RFP's come down to the same thing: They typically need to be answered within a fairly limited amount of time, and they require a lot of leg work, writing, and creativity.

Organizations often spend a great deal of time and resources putting together an RFP, thinking of the challenges they generally see within their organizations, and specifically within the development departments. So, how can these organizations ensure that the responses they receive to their RFPs will meet their needs, and be similar enough that comparisons are accurate and relevant? And ultimately, how can they ensure that the agency they select truly fits their needs, and can help address their fundraising challenges?

Start by Asking the Right Questions

Fundraising is a “people business.” So, why is it that some RFP’s ask virtually impossible questions? Or demand equally impossible deadlines? Is the goal really to look for the most desperate agency that will jump through hoops to get the answers? Or is the goal to look for the best agency for the job?

Creating a standard RFP is impossible. Every organization is different, and every organization has different requirements, and is looking for an agency that “fits them best.”

However, there are some basic “golden” rules to constructing an RFP that will work for both parties -- organizations and agencies. These rules will ensure that answers to RFP’s provide the most relevant and pertinent information, and provide a good overview of the potential of the agency.

The RFP Writer’s Golden Rules

1. Give a realistic timeframe within which to answer the RFP. A month is ideal. Two weeks is really too short if you would like to receive quotes for different elements from different competitive vendors.
2. Provide correct and complete information. While it may be hard to share response figures, do include at least the following:
 - a. How many agencies have received the RFP. You don’t need to share the names, but it is often helpful.
 - b. The reason for sending out the RFP: new agency search, change, new ideas, or simply because the organization is required to do an RFP every 3 years.
 - c. What challenges your organization currently faces: acquisitions, renewals, major gifts, telemarketing, types of media used, overall income generated.
 - d. Your Web site address, and as much background information on your organization as possible.
 - e. Samples of your current materials. If the agency has to hunt for them, it loses valuable time. Do indicate if you’re not happy with your materials and, if possible, why.

- f. A description of your current processes. Share your results if you can. This information will remain confidential, but it will certainly guide agencies in their effort to come up with improved strategies and tactics.
 - g. A description of the types of services for which you're looking.
 - h. Clear instructions. Be as clear as possible about the documents you'd like to receive, the deadline, where to send the proposal, to whom, how many copies to send, the specific order of organization of the documents, etc. Provide the name of a contact person who can answer questions. If appropriate, share these answers with all of the agencies from whom you are awaiting a proposal. If one agency has a question, it is likely that the others may have the same question. The goal is to ensure that all agencies are working from the same basic information.
 - i. A description of the review and feedback process. How long will it take? Will a presentation be required in the second stage?
 - j. Clear instruction about cost estimates: how you'd like them presented, what should be included, what should not be included. Indicate if retainer fees are acceptable or not.
3. Do not expect five-year plans. They're simply not useful, because the agency does not know your current situation. A one-year plan example is fine if some basic information has been given. For instance, if a membership organization does not indicate that the current membership rate is \$40, and that it does one acquisition appeal a year, it's hard for an agency to come up with a relevant one-year plan. Are you testing the agency on creativity, promises, or crystal ball reading?
4. Do you expect spec creative? Please understand that this costs time and money. It is much more pertinent to expect this in a second or third phase. Past examples of the agency's work should provide enough insight into how creative the agency can be, and their production quality. Unless it is an RFP for creative test ideas, it's not fair to expect an agency to spend many hours of valuable time developing creative ideas that cannot be used by the organization, in any case, if the agency is not selected.

5. Do let the agency know that their response and proposal have been received.
6. Do let the agency know what the real reason was they made it, or did not make it, to the next stage. Agencies appreciate the opportunity to answer RFPs, and put significant time and effort into their responses.

You want to be able to judge agencies in an objective way, based on the same criteria, and come up with the best fit. If the above rules are followed, chances are that the proposal process will become a more pleasant experience for both parties. And you will, much more quickly, find that rewarding relationship with the best agency to address your current needs.