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Go Beyond



# REQUEST FOR (A NEW) PROCESS

Refining Your Fundraising RFPs  
with New Paradigms, Questions, and  
Templates to Find the *Right* Partner

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*By Kelley Stewart*



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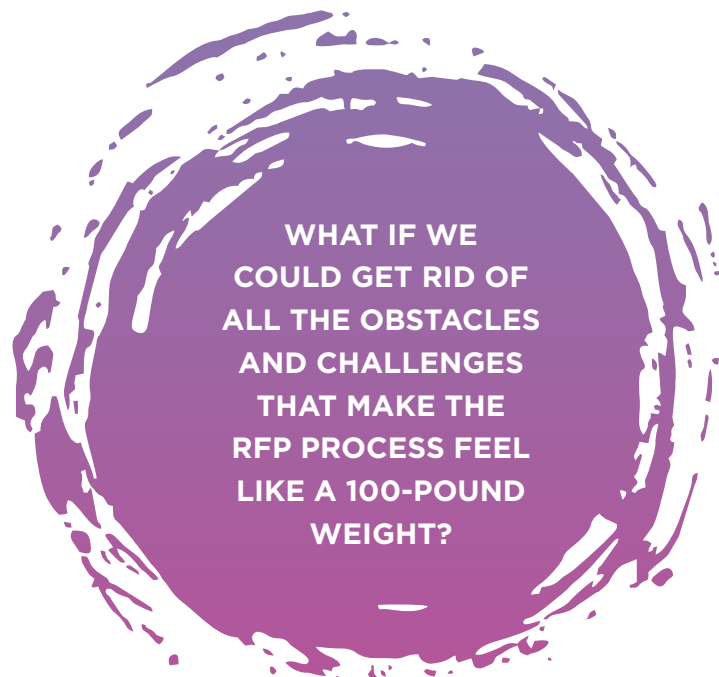
# INTRODUCTION

## Is the Fundraising RFP Process Broken?

In the world of business, it has become standard fare for organizations to elicit bids for products and services through the request for proposal (RFP) process. The fundraising industry is no different. Most of the philanthropy leaders I know are either finishing up an RFP evaluation, currently in one, or about to start the process. Unfortunately, the RFP appears to be falling short as an evaluation tool to help us competently ascertain potential partnerships.

I've spent the bulk of my career in philanthropy, and in that time, I've been exposed to both sides of the RFP process. We issued countless RFPs during my tenure with two large, national, multi-affiliate organizations. And since joining Pursuant, I'm part of the team that's responsible for responding to RFPs. It goes without saying that oftentimes an RFP is an organizational requirement.

**But are they working?**





## Most Leaders Think the Fundraising RFP Process is Broken

Last year, our team conducted an informal study to better understand the painstaking process that many organizations go through when issuing, gathering, evaluating, and ultimately choosing a partner through the RFP process. Here are a few insights we discovered:



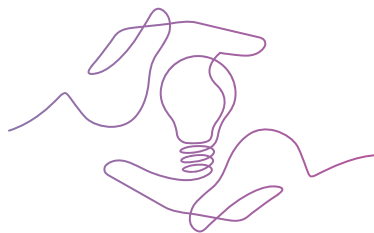
**It's a time-consuming process in addition to all the other tasks and responsibilities on your plate.** 80% of respondents say the RFP process takes up a significant amount of time when you add up all the time spent reviewing responses.



**Understanding enough about each agency to discover unique differentiators to identify the best option is challenging.** The 65% of nonprofits are inviting at least 6 agencies to provide responses when issuing an RFP to find a partner for a major program like direct response.



**Obtaining collective buy-in where every key stakeholder feels confident is rare.** 65% of respondents have at least 6 stakeholders involved in the decision-making process.



When you think about these statistics, it's no wonder that the most common challenge respondents face is understanding the unique differentiators from responses and gaining enough clarity in the process to make a confident decision. **What makes these statistics even more painful is that most organizations issue RFPs for multiple programs—direct response, analytics, technology platforms, and so on.**



**YOUR TEAM**  
CAN REVITALIZE YOUR  
RFP PROCESS TO  
ENSURE THAT IT HELPS  
YOU FIND A PARTNER  
THAT WILL TRULY HELP  
YOUR ORGANIZATION  
**THRIVE.**

## It's Time to Rethink the RFP Process

As I stepped back to reflect on these statistics, along with my collective experiences, I noticed some of the inherent challenges that exist in the RFP process. I then began to challenge my own thinking and to explore the question of could we—and should we—reconsider the way we utilize RFPs in the fundraising industry?

**What if there were a better way?** What if there were a way to actually gain the clarity we need to feel like we can make a confident decision? What if we could get rid of all the obstacles and challenges that make the RFP process feel like a 100-pound weight we have to pick up and carry for a few months every couple of years?

**That's what this resource and RFP kit are all about.** If you've been frustrated by the RFP process, or you're simply looking to optimize every second you spend looking for the right partner, I'm with you. In this resource, I want to outline some new ways of thinking about RFPs in order to help you feel more confident about the partners you choose. In addition to this resource, we've included a couple of the best RFP templates we've seen from nonprofits seeking a new direct response and analytics partner.

As you consider the ideas in this resource, I encourage you to make it a collaborative process with other stakeholders on your team. Together, you can revitalize your RFP process to ensure that it helps you find a partner that will truly help your organization thrive.



## PART I

# A NEW PARADIGM TO CULTIVATE HEALTHY, THRIVING PARTNERSHIPS

When it comes to making a decision during the RFP process, most leaders focus on two primary areas: results and cost. That makes sense. You want to ensure your partner will provide the results you need to succeed while meeting the budget requirements you're given. Unfortunately, most leaders are pressured to focus on generating immediate, short-term results. As a result, nonprofits and agencies don't give themselves a lot of time and space to understand the interdependencies of how things work together.

But, there's one key element that often gets put on the back-burner. And it might be the most important factor in determining whether you wake up a year from now excited to go to work every day or dreading it.

**Organizations that actually obtain clarity during the RFP process and reap the benefits of finding the ideal partner are intentional about finding the right “fit.” They recognize that a partnership is a relationship. Thus, they take time to find an agency that's committed to cultivating a healthy partnership.**



# A New Paradigm to Find the Right Partner

What separates the positive, healthy, thriving partnerships from the negative, unhealthy, frustrating ones? And what can your organization do to increase the likelihood your agency partnerships will be a success?

Based on my experience working on both sides of the table, here are some keys to identify and cultivate healthy partnerships between an organization and its agency partners that will be beneficial for both sides...

1

## **Take time to define what an ideal partnership looks like for *your* organization.**

Before you launch a campaign or program you take time to consider the factors that will impact its ability to thrive.

In the same way, nonprofits that develop thriving partnerships are ones that take time to step back and identify the cultural realities of their own organization—and how they might impact the partnership with a new fundraising agency. Before you try to find a new partner through the RFP process, it's imperative to know who you truly are, versus who you wish you were. It's also critical to articulate what a good partner means for your organization—not specific to a scope of services, but from a cultural perspective. How will an ideal partner fit with your culture? What type of thinking gets things moving in your organization?

2

## **Consider the journey, not just the finish line.**

When it comes to finding a partner through the RFP process, it's inherent for nonprofits to focus on *what* rather than *why*. Organizations spend a lot of time evaluating the practical details of the partnership (budget, projections, etc.) instead of evaluating the more qualitative elements like cultural fit, agility, problem solving, and problem solving ability.



Finding a partner that you can trust, collaborate with to overcome challenges and solve problems as they arise, and generally enjoy working with is just as important as finding someone who can help you reach the destination.

3

**Strengthen collaboration by having a clear definition of success.**

As with any relationship, it takes an intentional posture to create a thriving, collaborative partnership. The work doesn't stop once you select an agency partner. To establish that posture, create alignment around how success will be measured. That means being transparent and sharing accountability between organization and agency. Let it be known that your organization and this agency are walking through fire together, and any problems you face must be solved together as a team.

4

**Create a culture of curiosity that understands the interdependencies of things.**

The best leaders and strategists are ones with a natural curiosity about what makes a program thrive and a commitment to adjust their approach based on what they learn.

In the same way, nonprofits that experience wild success in their partnerships are most often characterized by leaders who understand how even the smallest changes in their programs impact donor experiences and ultimately results. New ideas doesn't scare them because they approach their fundraising programs with a posture of curiosity—testing strategies and trying to learn what will truly generate the greatest long-term impact.







THE RFPS THAT  
PROVIDE CLARITY  
AN ORGANIZATION  
NEEDS TO FEEL  
CONFIDENT ABOUT  
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**ASK DIFFERENT  
QUESTIONS.**

## PART II

# GETTING THE ANSWERS YOU *REALLY* NEED

Everyone involved in the RFP process wants their decision to ultimately lead to a healthy, thriving partnership. But how do you take the ideas we discussed in the previous chapter and apply them to your RFP process?

After reading and responding to dozens of RFPs during my time at Pursuant, there are a few common characteristics of really good RFPs. These are the ones that actually enable nonprofit leaders to get answers they need to ensure a successful partnership.

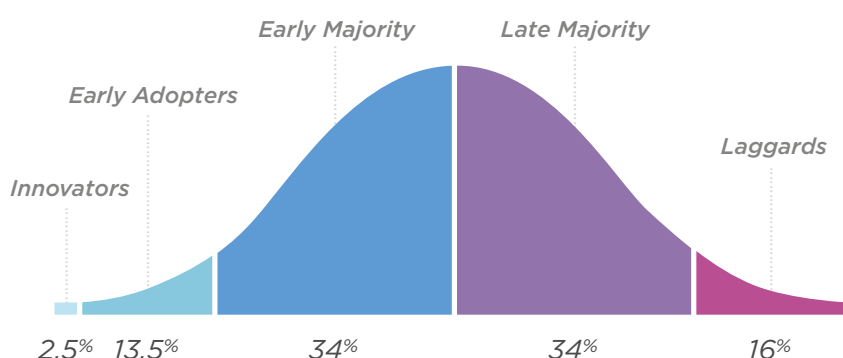
The RFPs that provide clarity an organization needs to feel confident about its decision often ask different questions. Rather than primarily asking agencies to differentiate themselves around price and experience, they look for things like culture, fit, and an agency's philosophy of fundraising.



## 1. Previous Experience versus Primary Philosophy

There are benefits and limitations to having a partner that specializes in working with organizations that are just like yours. Take food banks, for example—there are hundreds of organizations across this country working to eliminate hunger in their communities. Many have similar missions, comparable constituent bases, and even affiliations with larger parent organizations. But when you look at the opportunities that stand before a food bank in New York City, a food bank in Detroit, and a food bank in Lafayette, Louisiana, you come to find that their commonality as food banks is almost irrelevant.

An alternative way to evaluate what you need in a partner is to consider where a company falls among Everett M. Rogers’s innovation “adopter categories,” as described in his book *Diffusion of Innovations*.



Is your organization looking for a more conservative “late majority” approach that focuses on deploying strategies that have already been utilized by other organizations? Or are you looking to be an “early adopter” or even an “innovator” that develops strategies that are as unique and specialized as your organization?

**Finding a partner that has experience with serving organizations that fall into the same “Diffusion of Innovation” category as yours will foster greater collaboration and ultimately position your organization for greater success.**

## 2. III-Informed Projections versus Insights into Your Program

Projections are an important part of the RFP process, but it can be tough to get accurate information without sharing important insights into the current state of your program.

Organizations that get accurate projections are intentional about the information they provide potential partners as part of the RFP process. If you’re asking for a detailed plan or baseline projections, consider what data you’ve provided them. For direct



response engagements, have you shared the composition of your database? Have you summarized the results of previous campaigns? If you're requesting spec work, have you provided your style guides?

**Providing as many insights into the current state of your program as possible will help agencies provide accurate projections based on the health of your file. It can also empower them to recommend new ideas to enhance your program.**

### 3. Unique Differentiators versus Passionate, Problem-Solving Experience

Simply asking the question “What are your differentiators?” may not be enough, as potential partners rarely have enough intimate knowledge about their industry peers to be able to provide insightful answers. Instead, much like you'd do during an interview, invite the potential partner to share about an experience where they overcame unforeseen obstacles or applied creative solutions to a difficult challenge. **Ask them how they might address a specific problem your organization is currently facing.**

Invite them to share something specific about your organization and this engagement that interests them. This will allow you to validate that they are truly interested in working with your organization and aren't responding simply because they were asked.

### 4. Quick Interviews versus Collaborative Working Sessions

Most RFPs are centered around an interview process where each finalist is brought in for a two-hour “pitch” for decision-makers. When you stop and consider the sizable investment your organization is about to make in this partner—both in the amount of time and dollars—and when you consider the meaningful impact this partnership will have on both your short- and long-term success, it seems unreasonable that a single conversation of less than two hours would be sufficient.

Organizations that find a partner they enjoy working with often take time to rethink the traditional RFP timeline. **Consider a half-day working session where you roll up your sleeves and begin to whiteboard the initial strategy. This will allow you not only to see how the collective team approaches solutions, but also to experience if there is any synergy in the way you communicate.** Or as an alternative, determine if there is a way to allow for a pre-engagement test, where you begin working on a portion of the engagement as a way to evaluate the partnership.



# CONCLUSION

## Transforming RFPs from “Rigid, Fatiguing Procedure” to “Revealing, Fruitful Process”

Embracing these ideas takes commitment. It’s a lot easier to maintain a “business-as-usual” mentality to RFPs. But does that approach really help take your organization to the next level? Did it work the last time you issued an RFP?



**Taking a new approach to RFPs in order to harvest healthier, lasting agency partnerships for your nonprofit can create a new reality where...**

### **You actually enjoy showing up to work every day.**

Having a partner that truly gets you and your organization and understands how you operate will make every effort go a little smoother. It’s amazing how much easier it is to get things done when you enjoy working together.



### **You don’t feel alone in solving big problems.**

With any partnership, there will be “rocks” along the road. The key is how you deal with them. In an unhealthy partnership, a single rock can easily derail things. With a healthy partnership, a rock is simply a challenge that can be resolved through team thinking.



**You're able to create a greater impact for a long period of time.**

Hitting reset on the RFP process and finding the right partner might mean a short-term step backward for mission progress—especially when you're used to focusing on immediate ROI rather than on creating a healthy fundraising program. Rather than being stuck in the revolving door of agencies, healthy partnerships enable you to work together to create healthy, sustainable change and long-term impact within your organization.

Embracing these ideas and using the RFP process to find a partner you can truly trust will create a reality where your team and overall fundraising program are both truly thriving. The results might not grow immediately overnight. However, taking the time to find an agency partner that truly aligns with your organization is key to cultivating a healthy partnership. That is the kind of RFP process that will help you find the right partner and create an environment where growth is inevitable.

**EMBRACING THESE IDEAS  
AND USING THE RFP PROCESS TO FIND A PARTNER YOU  
CAN TRULY TRUST WILL CREATE A REALITY WHERE YOUR  
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TRULY THRIVING.**



## ABOUT THE AUTHOR



A leader in nonprofit fundraising, **Kelley Stewart** is committed to helping solve for the real-world challenges of today's increasingly competitive environment. With nearly two decades of strategic planning, marketing and fundraising experience, Kelley's emphasis is in healthcare, multi-affiliate health and human services organizations.

Her strength is in coming alongside nonprofit organizations regardless of their size or tenure, and helping them achieve their vision and goals through strong leadership and a balance revenue portfolio.

Prior to joining Pursuant, Kelley led a \$60M digital program for the American Cancer Society (ACS) and helped the Avon Foundation for Women conceive and implement a strategy that activated philanthropic leaders in 50 countries in celebration of 50 years of impact in their global crusade to fight breast cancer.



# ABOUT PURSUANT

As an agency built by fundraisers for fundraisers, Pursuant exists to help determined nonprofits make an even bigger impact in the world. Founded in 2001, Pursuant has helped hundreds of organizations raise billions of dollars through our direct response, digital, major gift, and analytics services.

## WE'D LOVE TO PARTNER WITH YOU

**Are you issuing an RFP to find a partner to help take your fundraising program to the next level? We'd love to be considered!**

We are an experienced team of strategists and practitioners who can meet you where you are and take you where you want to go through direct response, direct mail, digital, and analytics services.

Email us at [info@pursuant.com](mailto:info@pursuant.com) to submit your RFP.

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