RFP BEST PRACTICES

A COMPREHENSIVE RFP FRAMEWORK FOR NONPROFIT FUNDRAISING PARTNERSHIPS

A GO-TO-GUIDE

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COMPILED BY INDUSTRY EXPERTS

The Nonprofit Alliance

Contents

Introduction

This comprehensive guide serves as an essential resource for nonprofit organizations navigating the Request for Proposal (RFP) process when seeking fundraising partners and vendors. Developed by a TNPA RFP Task Group, it compiles best practices, frameworks, and practical guidance to help organizations conduct effective, transparent, and mutually beneficial RFP processes. While written primarily for direct response RFPs, a development team could easily adapt the framework for other third-party partners.

This guide establishes industry standards for RFP development and execution that streamline the vendor selection process, ensure fair evaluation of potential partners, maximize the likelihood of successful long-term relationships, and save time and resources for nonprofits and agencies.

By following this set of recommendations, organizations will:

- Reduce administrative burden through structured approaches

- Improve vendor response quality through clear communication

- Make informed decisions based on comprehensive evaluation criteria

- Foster productive relationships with potential partners

- Align vendor selection with organizational mission and objectives

- Ensure transparency and fairness throughout the selection process

Elevating industry standards for nonprofit-agency partnerships ultimately strengthens the sector's capacity to advance important missions through effective vendor relationships. As historian and author Edward Everett Hale said, "Coming together is a beginning; keeping together is progress;

working together is success" (1902). This guide is a tool and resource for establishing a firm beginning that is the foundation for progress and success to follow.

Why are you RFP'ing? Do you need an RFP?

This self-assessment framework will assist nonprofit organizations in determining whether an RFP is necessary and beneficial *at this time*. Before investing significant time and resources into a formal Request for Proposal process, these questions help leadership teams clarify their objectives, evaluate current vendor relationships, assess organizational readiness, and consider alternative approaches that might better address their fundraising goals. Affirming your organization's readiness sets you up for success and ensures that the significant investment of resources and time will address your needs appropriately.

1. Purpose and Objectives

- What specific problem or opportunity are we trying to address with this RFP? For example, are we seeking to increase ROI, improve donor retention, or add new services/channels/expertise?

- Is this RFP mandated by the board or other leadership? Is it motivated by a strong desire to change agencies, general due diligence, or to see what's new in the marketplace since the last time we went out to RFP?

- Is there a gap in our current strategy, vendor, campaign, or relationship performance that warrants change?

- Are our goals clear and measurable? Can these goals be realistically achieved through this RFP process?

- Do we have specific key performance indicators (KPIs) for this program, e.g., donor growth, cost-per-acquisition, net revenue?

- Is this RFP aligned with our broader fundraising strategy?

- Does this initiative fit within our long-term strategic plan?

- Are we focusing on the right priorities at this time?

2. Current Vendor or Program Evaluation

- Are we unhappy with our current agency or internal program? If so, why?

  - Is the dissatisfaction due to performance, communication, costs, or another singular factor?

- - Have we provided clear feedback to the current agency and allowed them to address these issues outside of a competitive RFP environment?

- Have we outgrown our current vendor?

- Can the current vendor adapt to meet our evolving needs? Do they have the expertise and capacity required for the next phase of our growth?

- If we're satisfied with our current vendor, what is driving the RFP?

3. Organizational Readiness

- Do we have the internal staff capacity to manage an RFP process effectively at this time? Who will write the RFP (or customize a template to be relevant), act as the project administrator, review proposals, and participate in interviews?

- Have we surveyed the marketplace to identify the agencies/partners who are likely to be viable prospective partners? Do we feel like we have a reasonable number of firms to include in the RFP (not too few and not too many)?

- Do we have the expertise to evaluate responses critically, or will we need external assistance?

- Are we prepared to onboard a new partner or vendor if needed?

- Do we have the time, resources (including staff bandwidth and additional expense budget), and internal support to ensure a smooth transition?

- Do we have the data, tools, and infrastructure to support a new program?

- - Are our systems compatible with the kinds of strategies we want to implement?

- - Is our donor database clean, up-to-date, and ready for use to inform new budgets and strategies?

4. Financial Considerations & Managing Expectations

- Do we have the budget to support a transition, including onboarding and an agency overlap period?

- Do we have the budget to invest more in a program, if proposed?

- Could incremental budget allocated to support a transition instead be invested to address current issues more effectively and with less disruption to the program?

- If our budget is flat, will a new agency be able to achieve our goals?

5. Long-Term Strategy

- What is our vision for the direct response fundraising program?

- Are we focused on donor acquisition, retention, or reactivation? Or all three?

- How does this program integrate with our other fundraising efforts?

- Will it complement major gifts, events, planned giving, and other initiatives?

- Are we clear on how it supports our mission and brand?

- Do we want a bold new direction, or is refining existing strategies more realistic?

6. Board and Stakeholder Alignment

- Is the RFP truly necessary, or is it a reaction to board or other leadership pressure or bylaws?

- Has the board or other invested internal influencers clearly articulated why they believe an RFP is needed?

- Are there alternative ways to address concerns without issuing an RFP?

- Are all key stakeholders aligned on goals and expectations?

- Have we discussed and agreed on what success looks like for this program?

- Do we have buy-in from leadership for the resources and effort required?

- If a new agency is selected, will we give them the ability to implement the program as they recommend, or will we need to be integrally involved in this process?

7. Assessing Our Needs & Intent

- Do we have a clear idea of what we want in the RFP?

- Are we prepared to articulate our goals, current challenges, and expectations in detail?

- Are we willing and prepared to share the necessary information about our current program and donor file with agencies to inform their proposal?

- Will issuing an RFP add value to our process?

- Is this a genuine opportunity to find the best fit for our needs, or are we just looking for fresh ideas?

- Will we give fair consideration to all proposals?

- Are we prepared to proceed with a new agency if they present a stronger proposal than our current agency's?

8. Lessons from the Past

- Have we conducted an RFP for this program before?

- What did we learn from that process?

- Did it result in a successful partnership?

- What feedback have we received from past vendors?

- Have past agencies shared insights on how to improve our approach or expectations?

- Are we repeating mistakes or overlooking opportunities?

- Are we addressing recurring issues to ensure the information we receive is useful and actionable?

9. Alternative Approaches

- Can we achieve our goals without an RFP?

- Could a meeting with our current agency yield the new ideas or improvements we need?

- Would an industry consultant help refine our program more efficiently?

- Is starting with a limited RFI (Request for Information) more appropriate? (See the next section for ideas and best practices around launching an RFI.)

- Could we solicit insights and high-level strategies from a few select agencies without a full RFP?

10. Commitment to the Process

- Do we have the authority, budget, and internal alignment to act on the selected proposal?

- Have we mapped a reasonable schedule for the RFP process to allow both parties sufficient time for each step? A well-run RFP generally requires at least three months, with more time needed for an RFI phase or accommodating seasonal periods when required staff may be less available and responsive.

- Are we prepared to follow through with transparency and fairness?

- What is the opportunity cost of this RFP? Will this process divert resources from other priorities or ongoing campaigns, and is that a trade-off we're prepared to make?

Final Reflection

If, after answering these questions, the RFP process still seems appropriate, proceed with confidence. However, if doubts remain, consider pausing to address internal issues or explore alternative ways to improve your program without an RFP.

An RFI Framework

Concept

We strongly recommend that organizations begin with an initial Request for Information (RFI) vetting process to narrow the list of final RFP recipients to a carefully curated group of three to five agencies. This creates a more manageable workload for both the nonprofits and agencies and ensures that the time spent preparing and reviewing proposals is focused on the agencies with the highest qualifications to win the business.

Vetting Criteria

The pre-RFP vetting process should evaluate three key elements:

1. **Relationship**

    - Are the agency leads and account team a good fit with your team and aligned with your organization's values?

    - Do they demonstrate an understanding of and commitment to your mission?

2. **Capabilities**

    - Does the prospective agency provide clear evidence that they possess the skills and expertise you seek?

    - Are their past successes relevant to your needs?

3. **Pricing Model**

    - Does the agency's pricing approach align with your budget expectations?

        Note: This is not a budgeting exercise but an opportunity to assess alignment on cost expectations. (Pricing comes later in the RFP.)

Channels for the RFI process

The goal of the RFI stage is to foster mutual discovery and understanding. This can be achieved through:

1. **Formalized Questions**

Provide structured questions that allow agencies to showcase their expertise and approach while offering insights into their working style.

2. **Face-to-Face Interactions**

If possible, include opportunities for virtual or in-person discussions to assess rapport and communication styles.

3. **Presentation of Responses**

Request a concise presentation of responses to your questions, enabling you to evaluate the agency's communication and strategic thinking skills.

Resources to Provide to Agencies During the RFI Process

At this stage, the agencies need a sufficient understanding of your current program and your scope of work (SOW), who you are, and your challenges and opportunities to demonstrate their qualifications as a solid partner for you. They do not yet need actual data.

Recommended resources:

1. **Background Information**

   - State why you are pursuing an RFP and your goals for this initial RFI process.

   - Provide a timeline for the selection process.

   - State the expected contract duration.

2. **Scope of Work (SOW)**

   - Outline your intended SOW and any areas outside its scope.

   - Share examples of current marketing materials and key performance indicators.

3. **Organizational Overview**

- Include a brief history of your nonprofit and an organizational structure diagram (with names) beginning with the CEO and moving through relevant teams that will work with and be served by the agency.

- Specify any existing partners the agency would collaborate with.

4. **Sample Data**

- Provide anonymized insights into donor file size, health, make-up, and other constituent groups that may be part of your SOW.

- Share an overview of the specialized marketing groups within your constituent file, such as Mid, Major, Planned Giving, and Sustainers, and explain how those groups are defined.

- Outline your donor tiers.

- Provide a schedule of mailings/outreaches, etc.

5. **Mutual NDA**

- **See Attachment A.**

RFI Actions to Request of the Invited Agencies

1. **Intent to Participate**

- Submit a formal email response indicating intent to participate in the RFI process.

- Sign and return the mutual NDA as provided.

2. **Engagement**

- Participate in planned discovery sessions. Consider a "lite" version that provides sufficient information to narrow the agency candidate pool without becoming unnecessarily time-consuming for either party. There is opportunity for a deeper dive with short-listed agencies at the next phase.

3. **Response Submission**

- Provide succinct responses to RFI questions.

- Deliver a presentation summarizing key points.

Sample RFI Questions

1. **Agency Resources**

   - What is your agency's vision and how does ownership support it?

   - Tell us about your values and describe your agency culture.

   - Tell us about the team and what makes your agency unique.

   - Please share a comprehensive list of services and areas of expertise.

2. **Strategic Approach**

   - Describe your agency's view on the future of fundraising and what key things nonprofits should be expecting/planning/doing now to adapt.

   - What is your view of omnichannel best practices and how do your agency's behaviors support this?

   - Share an example where your agency delivered a genuine and beneficial engagement experience to constituents in a creative way.

   - Can you cite a time when you broke new strategic or other ground for a client program?

3. **Clients and Experience**

   - What is your company's history and experience in the fundraising sector, particularly with organizations similar to ours in size, mission, and target audience?

   - Describe the best client partnership you've had and how the nonprofit/client contributed to this outcome.

   - Share a summary of clients you've supported in our sector.

   - Are there any conflicts of interest or exclusivity concerns?

4. **Compensation, Security, and Legal**

   - Outline your fee structure and approach to pricing.

- How do you manage confidentiality with your clients' work?

- Provide an overview of your data security and technology practices.

- Attach a copy of your base contract.

Sections to Consider

With the RFI process concluded, the RFP phase is an opportunity to build upon what you've already discovered about the refined list of potential agency partners. **The goal is to obtain detailed, actionable proposals that provide clarity on agency capabilities, approaches, and fit, without redundancy**. This phase should deepen the engagement with shortlisted agencies, leveraging the foundation set in the RFI stage.

Quality responses begin with quality questions. Before finalizing your RFP, review it to ensure that you are meeting these three key objectives:

1. **Clarity:** Ensure your questions are clear, concise, and avoid ambiguity.
2. **Relevance:** Focus on questions directly related to your organization's specific fundraising needs.
3. **Evaluation Criteria:** Make sure your questions tie back to clearly stated key factors you will use to evaluate proposals and select a partner.

Example RFP Structure

1. Introduction and Background

- **Objective**: Establish context and inspire alignment.

- **Key Inclusions**:

  o **Mission Relevance**: Highlight why this project aligns with your mission and its criticality at this time.

  o **RFI Summary**: Provide a high-level overview of what stood out about the shortlisted agencies and the key insights gained during the RFI phase.

  o **Strategic Objectives**: Clearly define what this partnership aims to achieve (e.g., improving donor retention, leveraging data-driven campaigns, optimizing omnichannel strategies).

2. Detailed Scope of Work (SOW)

- **Objective**: Clearly define what you expect from the partnership.

- **Key Inclusions**:

  o **Services and Deliverables**: Break down the required services into categories (e.g., strategic planning, creative execution, analytics). For example:

    ▪ Strategic planning for direct response program, including X acquisition campaigns (X channels), X renewal campaigns (X channels), Mid-Level program (X channels, etc.).

    ▪ Nature of relationship: does the nonprofit tightly manage and direct the agency or expect to follow the agency's lead? Does the nonprofit program staff expect certain other services by the agency, as in the quick turnaround of board reports, or provision of other information the client contact may need to fulfill internal demands and expectations?

    ▪ A clear delineation of the scope of the RFP (e.g., is management of telemarketing vendors included, are portions of the program managed by other departments, etc.).
    ▪ A list of all sub-partners, with an explanation of the primary agency's role in managing those relationships and contracts. Clearly note whether those third-party services are included in the RFP and, where appropriate, the renewal dates on existing contract terms.

  o **Prioritization and Timelines for RFP:** Define must-haves versus nice-to-haves, with expected timelines for each deliverable.
  o **Metrics for Success**: Provide KPIs such as donor acquisition rates, revenue growth, or audience segmentation accuracy.

  o **Collaboration Expectations**: Specify integration needs with internal teams or third-party vendors, inclusive of identifying any specific expected or required interactions with internal team members.

3. Tailored Proposal Requirements

- **Objective**: Encourage responses that are relevant, actionable, and differentiated.

- **Key Inclusions**:

  o Request specific strategies for addressing challenges identified during the RFI (e.g., donor retention in mid-level donors, optimizing underperforming channels).

  o Include questions that assess an agency's innovative thinking and ability to tailor solutions. For example:

    o How would you assess our current fundraising landscape and identify potential growth areas?

- What specific fundraising strategies do you recommend for our organization, including a mix of online, offline, major donor, and sustainer initiatives?

- How would you (we) research and identify potential new donor segments and cultivate relationships with them?

- Ask for proposed methodologies, detailed timelines, and unique processes.

4. Case Studies and Proven Success

- **Objective**: Validate an agency's expertise and past results.

- **Key Inclusions**:

  - Request two to three case studies that align closely with your mission or project scope, or specific areas of your program that are core to the RFP response.

  - Ask agencies to include details on measurable outcomes, challenges addressed, and long-term impacts achieved.

5. Team Dynamics and Communication, Cultural and Value Alignment

- **Objective**: Ensure cultural fit and operational efficiency. Assess alignment with your mission and values.

- **Key Inclusions**:

  - Request bios of the team members who will be directly involved, including their roles and relevant experience.

  - Ask agencies to propose a tailored communication and reporting framework, detailing frequency and formats (e.g., dashboards, regular check-ins).

  - Ask agencies to describe how their values align with your organization's mission in an essay-style response.

  - Request specific examples of how these values have influenced their client relationships or project outcomes.

6. Refined Budget and Cost Details

- **Objective**: Ensure transparency while allowing flexibility.

Note: Because agencies price their solutions in different ways, it is critical to ensure you can review pricing in the same way (apples to apples).

- **Key Inclusions**:

  o Request a detailed budget breakdown, including project-based fees, retainers, and production costs. Ask the agency to specify any expectations for performance-based incentives. You will need to provide the following information:

    ▪ Program breakdown (what programs/campaigns are you requesting pricing on?).

    ▪ Quantities for direct mail campaigns, number of email campaigns (inclusive of resends), number of SMS/MMS messages, etc).

  o Request estimated implementation costs for proposed new strategies, including staff time, technology, and marketing expenses.

  o Ask for an explanation of the agency's budget management and tracking protocols to ensure efficient allocation of resources.

  o Ask for scalability options or phased approaches to accommodate varying budgets.

7. Data Security and Compliance

- **Objective**: Protect your organization's sensitive data.

- **Key Inclusions**:

  o Request a specific response to your organization's data security needs. Provide a detailed explanation of the planned integration and interaction of the agency with any specific data. What data will you share? How is it currently handled? Are there options for changing the process?

  o Include a checklist of certifications, tools, and protocols to be confirmed.

  o Ask how the agency has handled similar data-sensitive projects in the past.

8. Timelines and Deliverables

- **Objective**: Ensure alignment on expectations and capabilities.

- **Key Inclusions**:

- Clearly define submission deadlines, review timelines, and the anticipated decision date.
- Ensure that you proactively alert agencies of any date changes throughout the entire RFP process.
- Request agencies to propose phased timelines for project execution, including key milestones and dependencies.

Enhancements Based on Successful Responses

1. **Focus on Impact**

   - Agencies should be prompted to show how their strategies directly influence donor engagement, revenue growth, or audience expansion.

   - Use targeted questions like: "What specific strategy would you use to reduce donor churn in our mid-level segment by 15% over 12 months?"

2. **Prioritize Data and Insights**

   - Successful proposals leverage data insights for decision-making. Request examples of how agencies have used predictive analytics, machine learning, or donor modeling to drive tangible results.
   - Sharing program data with the agencies is a valuable exercise. It allows the organization to understand what a prospective agency sees within their program and the solutions they would identify for those opportunities. For example, ask the agency to identify three things that are going well and three things that may be classified as opportunities.

3. **Encourage Integration with Existing Ecosystems**

   - Agencies must address how they will integrate with your technology stack, including CRM, email platforms, or analytics tools. Ask: "What is your experience working with [specific tools] to deliver omnichannel campaigns?"

   - Note: This could also be included within the data security section. These need to be detailed within the RFP as they are important relationships and processes.

4. **Innovation-Driven Questions**:

- Encourage agencies to share emerging trends they would recommend leveraging for your nonprofit. Examples include donor personalization, AI-driven segmentation, or text-based donor engagement. You can also pose specific questions about key areas of concern within your program, e.g., "How would you suggest we integrate technology to streamline donor interactions and enhance the giving experience?" Or, "What methods could you help implement to measure donor satisfaction and identify areas for improvement?"

- Ask what the agency sees as the "state of the industry" or challenges that nonprofits are currently facing or will face and how the agency is addressing them or would address them.

- Be candid about how much "blue sky" is available for a new agency to make a big difference.

5. **Proactive Problem-Solving**:

- Request agencies to identify potential challenges in executing the SOW and how they would mitigate them.
- Agencies want to problem-solve. Disclose specific challenges you are currently experiencing or issues you know or suspect may be suppressing better results, e.g., message weakness and stale creative, or cost increases in specific areas (like a postal rate increase that disproportionately impacts one control package).
- Similarly, call out upcoming challenges (opportunities), such as a brand refresh, a turning point on mission focus, new leadership and energy, or an expected change in your mission's relevance that could increase or decrease public awareness.

Tool for Reviewing and Filtering Questions

Filter Question	Key Considerations
Does it assess strategic capabilities?	Does the question prompt the agency to showcase how they'll achieve your specific goals?
Is it rooted in RFI findings?	Ensure questions build on the RFI process rather than duplicating content already addressed.
Does it address measurable outcomes?	Will the response tie back to tangible results, metrics, or benchmarks?

Is it sufficiently tailored to challenges?	Are the questions focused on your unique organizational needs and opportunities?
Will it encourage differentiation?	Does the question reveal unique approaches, creativity, or strategic depth? Will it reveal differentiating philosophies and approaches that will help you better evaluate the agencies?

A Template of FAQ's

The following is a curated list of follow-up questions agencies frequently ask a prospective client during the RFP phase. Consider this your "cheat sheet" of pertinent information that is often missing or omitted from RFPs. By proactively addressing these FAQs in the RFP, you will avoid delays or extra time required for the Q&A portion of the timeline.

Strategy

1. Are there specific goals for the direct response program in the next five years?
2. What are your current pain points in your direct response program?

Creative

1. Please share creative samples from different program areas, including your control direct mail acquisition package, samples from appeals, renewals, upgrades, sustainers, etc. Include digital campaign and digital advertising samples. [Consider all relevant channels: SMS, CTV, etc.]
   Tip: Ensure the samples are in a format in which the copy is legible and all components are fully visible.
2. Are there specific samples that capture the voice of your leadership particularly well?
3. Are there changes you want to see in the design and copywriting for your direct response campaigns?

File Metrics

1. How many donors/members do you have by recency/member level?
2. How many email addresses do you have and what is the breakdown between donors and nondonors?
3. How many mobile numbers do you have and how regularly do you deploy text messages? SMS, P2P, or both?
4. How many monthly donors do you have? What is their average gift? What is their retention rate?
5. What is your donor retention rate (overall, first year, multi-year)?
6. Of the full program revenue, what is the breakdown between DM and digital?

7. What is the breakdown between <$1,000 donors and $1,000+ donors [or whatever dollar amount you consider mid-level or major donors]?

Budget/Past Performance

1. Please share your fiscal year budget and calendar across all channels.
2. Please share performance reports across all channels (e.g., direct mail, email, texting, digital advertising).
3. If you are requesting detailed projections as part of the RFP, provide a data file containing all gift or donation records for the past three to five years.
   Note: If you are not comfortable providing full data files, adjust your questions about budget, performance, and projections questions to allow for a lower level of detail and promised accuracy.

Miscellaneous

1. What is your fiscal year?
2. What platforms are in your Martech stack?
3. Do you currently work with an agency of record for your direct response program? What other vendors do you partner with for your direct response program?
4. Why are you launching an RFP at this time?
5. How many agencies received your RFP?

RFP Etiquette Guidelines for Organizations

Navigating the RFP process requires thoughtful planning and professional courtesy to build productive relationships with potential partners. Transparency, fairness, and respect throughout the procurement journey will protect your organization and team's reputation and lead to stronger partnerships and better outcomes for your organization.

Start with your current partner(s). Ensure your current agency of record and vendor(s) are aware of the RFP. Clearly communicate if they are eligible to participate or if the process signals a transition.

- Define Clear Objectives

  o Clearly state the purpose and goals of the RFP.

  o Specify the scope of work, deliverables, and expected outcomes.

- Be Transparent

- About timing: Share why the organization is issuing the RFP at this moment, such as the need for new capabilities, a contract expiration, or a strategic shift.

- About requirements: Include clear eligibility criteria for vendors.

- About evaluation: Outline the evaluation process and scoring criteria, including the weight given to specific components (e.g., creativity, data analysis, pricing).

- About schedule: Provide a detailed timeline with key milestones.

- Clarify Budget Expectations

  - Share an expected budget range or parameters to help agencies align their resources and capabilities effectively.

- Communicate Expectations Clearly

  - Share specific instructions for proposal formatting and submission.

  - Specify any limitations, such as page limits or required attachments.

  - Establish communication protocols. Set expectations from the beginning on how questions will be handled (e.g., group Q&A sessions or one-on-one queries).

  - As much as possible, allow for direct communications. Encourage real-time virtual or in-person meetings to foster a deeper understanding of both parties.

- Ensure Accessibility

  - Make the RFP document easy to access and download.

  - Provide contact information for questions or clarification.

  - Host a Q&A session if needed and share answers with all participants.

  - If you're providing data as part of the process, consider assigning a data liaison. Designate a point person to manage and clarify data transfers to reduce confusion and expedite agency understanding.

- Respect Potential Partners' Time and Effort

- Allow adequate time for vendors to prepare a thoughtful response.

- Avoid unnecessary complexity in the RFP requirements.

- Do not include candidates you know will not be considered.

- Do not request work samples or prototypes without fair compensation.

- Acknowledge receipt of responses: Confirm receipt of RFP submissions within 48 hours to provide reassurance and track submissions.

- Be Fair and Commit to Ethical Practices

  - Maintain confidentiality of all proposals.

  - Ensure the evaluation process is unbiased and consistent.

  - Disclose who will evaluate the RFP responses and ensure that the process is ethical and fair.

  - Avoid conflicts of interest or favoritism.

  - Clearly state that donation gifts exceeding $100—or other excessive goodwill gestures—will not be accepted during the RFP process to maintain integrity.

- Document Evaluation Criteria and Scoring

  - **See Attachment B.**

  - Provide everyone participating in the evaluation process with clear selection criteria.

  - Document each proposal's scores.

  - Use the selected partner's scores as a starting point to leverage strengths and acknowledge areas where cooperative attention now will improve long-term outcomes.

- Provide Feedback

  - Notify **all** participants of the outcome promptly. This includes the selected partner as well as those not selected.

- o Offer constructive feedback to unsuccessful bidders when requested, helping them improve for future opportunities.

Frontlines Perspectives: Q&A with Nonprofits

The following is a sample of survey question responses from nonprofits that recently completed RFPs and volunteered to share their insights.

Q: Describe what went well and, where appropriate, what helped make that portion of the process successful.

A: We were very clear about the type of vendor partner we were looking for, their role, their charge and the composition of the overall team they would be part of. We also had a strong review panel that asked good questions to elicit the responses we needed.

A: A blessing and a curse [is] that we have an entire division within our institution dedicated to sourcing so they handled all of the back and forth with bidding agencies. This did require a ton of internal education since we were sourcing human capital not widgets, and our processes are very much built for widgets. Another thing that I have learned over the years is that the more information we can give bidding agencies to respond to, the better the responses are going to be to evaluate. It's ok to pull back the curtain to your program a bit to give bidding agencies enough information to build well informed pitches that are tailored to your organization.

Q: Describe what didn't go well and, where appropriate, what caused the issue.

A: While having a customized scoring matrix was helpful, it was applied a bit too rigidly. Panelists were asked to score vendor bids individually before any group discussion, which limited our ability to align on key priorities. Since not all panelists were equally familiar with the business needs, a collaborative conversation prior to scoring would have added essential context and improved the overall evaluation process.

A: If I could go back and do it again I would spend more time educating the selection committee on what a good partner looks like before we started scoring responses.

Q: What do you wish you knew at the onset?

A: Just how big of a lift it was going to be to move every piece of our program at the same time. We expected it to be a lot, but it was 2-3x more work than we planned for.

A: It would be helpful to better communicate the expected timeline and level of back-and-forth between bidders and the organization. A short, focused follow-up interview with each finalist - centered on the challenges, risks, or potential weaknesses identified by panelists - would allow for more honest, nuanced conversations and ultimately lead to stronger decisions.

Q: Is there anything else you would like to share that may be helpful to other organizations and/or bidding agencies and partners?

A: Put the necessary NDA in place to be bold, candid and share the details of your program -- its nuances, challenges or threats as well as the opportunities you believe are present.

A: Create a strong review panel comprised of people involved in or very knowledgeable about your program both within their specific job role as well as the industry overall -- colleagues whose opinions you trust or find valuable. In the end, trust your gut instincts when making the final decision.

Conclusion

The RFP process represents a significant investment of time and resources for both nonprofit organizations and potential partners. When approached thoughtfully and ethically, it can lead to transformative partnerships that advance your mission. This guide highlights the importance of internal preparation, strategic planning, and commitment to follow through.

An effective RFP goes beyond collecting bids—it's about finding a true partner who understands your unique challenges, aligns with your values, and can deliver measurable outcomes. By

following the guidelines outlined in this document, you'll create a more productive experience for all parties involved and increase your chances of forming a successful, long-term partnership that advances your nonprofit's mission.

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Thanks also to the individuals who provided expert input and reviewed the guide for clarity and completeness: **Sumarie Forrester**, Principal, Forrester Fundraising; **Karen Gleason**, Principal, Amplified Nonprofit Consulting; **Suzie McGuire**, CEO, Names in the News; and **Polly Papsadore**, President, Production Management Group.

Finally, we appreciate the **nonprofits who responded to our survey** about their recently completed RFPs to share candid feedback about what worked well and lessons learned. The survey responses were anonymous, so while we cannot give specific kudos here, their valuable input is reflected in the final product of the contributors listed above.

Attachment A

SAMPLE MUTUAL NON-DISCLOSURE AGREEMENT (NDA)

THIS AGREEMENT is entered into and made effective as of [DATE], by and between [AGENCY], with an office at [ADDRESS], and [Client], having its principal place of business at Client Address (each individually a "Party" and collectively the "Parties").

WHEREAS, in connection with exploring and evaluating a possible business relationship ("Relationship") and for the purposes of conducting any ongoing Relationship, the Parties recognize the need to disclose to one another certain of their Confidential Information (as defined below); and

WHEREAS, the Parties wish to provide the terms and conditions upon which such Confidential Information will be disclosed by one Party to the other Party hereunder;

NOW, THEREFORE, the Parties agree as follows:

1. "Confidential Information" means information in whatever form disclosed by one Party (the "Disclosing Party") to the other Party (the "Receiving Party") which relates to the Disclosing Party's business or the Relationship including without limitation business, financial and technical materials, information and data, or which although not directly related to the Relationship, is nevertheless disclosed as a result of or in connection with the Parties' discussions of the Relationship.

2. All Confidential Information furnished hereunder by either party to the other which is in tangible form shall be clearly marked with a "proprietary," "confidential" or similar legend, and if it cannot reasonably be so marked, written notice shall be given to the Receiving Party at the time it is furnished advising that it is to be treated as Confidential Information. In the event Confidential Information is furnished other than in tangible form, the Disclosing Party shall inform the Receiving Party of its proprietary nature at the time it is furnished.

3. The Receiving Party shall use the Disclosing Party's Confidential Information only for the purposes as stated herein and shall protect such Confidential Information from disclosure to third parties, using at least the same degree of care used to protect its own Confidential Information,

but in any event a reasonable degree of care. Confidential Information will not be copied, in whole or in part, except as necessary for performance as authorized hereunder. The Receiving Party will mark each copy, including its storage media, with all notices which appear on the original.

4. The Receiving Party may disclose the Disclosing Party's Confidential Information to its employees, officers, agents, directors, consultants and affiliates who have a need to know, and providing such employees, officers, agents, directors, consultants and affiliates (i) use the Confidential Information for the purposes stated herein only, and (ii) are bound to protect the Confidential Information as required hereunder. The Parties shall each be responsible for any breach of the terms of this Agreement by them or their respective employees, officers, agents, directors, consultants and affiliates and agree, at their sole expense, to take all reasonable measures (including but not limited to court proceedings) to restrain their respective employees, officers, agents, directors, consultants and affiliates from prohibited or unauthorized disclosure or use of the Confidential Information. The term "affiliate" as used herein means any person or entity controlling, controlled by or under common control with a Party.

5. The confidentiality and non-disclosure obligations of the previous paragraphs shall not apply if, and to the extent that:

a. Confidential Information was known to the Receiving Party prior to its receipt from the Disclosing Party;

b. Confidential Information is or becomes part of the public domain other than by the fault of the Receiving Party;

c. Confidential Information is rightfully disclosed to the Receiving Party by a third party that is legally free to disclose such Confidential Information;

d. Such Confidential Information is independently developed by the Receiving Party without access to the Disclosing Party's Confidential Information; or

e. Disclosure is required by a judicial order or decree of governmental law or regulation, provided that the Receiving Party promptly notifies the disclosing Party of such requirement and reasonable opportunity is allowed by the Receiving Party for the Disclosing Party to file for or obtain a protective order or otherwise proceed to protect under applicable law the interests of the Disclosing Party.

Receiving Party shall bear the burden of proof with respect to establishing that any Confidential Information falls within any of such exceptions.

6. Confidential Information disclosed under this Agreement (including information in computer software or held in electronic storage media) shall be and remain the property of the Disclosing Party. Nothing hereunder shall be construed as the granting of a license under any patent, patent application, copyright, copyright registration, trade secret or other proprietary right by the Disclosing Party to any person or entity or as implying any obligation or as making any representation and warranty with respect to Confidential Information other than is specifically stated herein.

7. The Receiving Party shall keep a record of the location of all tangible Confidential Information of the Disclosing Party in its possession, and, upon the written request of the Disclosing Party at any time, shall promptly return or destroy all such tangible Confidential Information of the Disclosing Party in its possession, along with all copies which it may have made, and all copies stored in any computer memory or storage medium, and no such Confidential Information shall thereafter be retained in any form by the Receiving Party. The Receiving Party shall be fully responsible for the return or destruction of all Confidential Information disclosed to its affiliates, its employees and its consultants. Including, but not limited to, intellectual property.

8. Without the prior written consent of the other Party, a Party will not disclose to any third party any information (including Confidential Information) regarding the Relationship, including without limitation the fact that discussions are occurring concerning the Relationship, any of the terms or conditions relating to the Relationship being discussed by the Parties, or the existence of this Agreement.

9. Either party may terminate the use of its Confidential Information at any time without any liability for such termination. Notwithstanding termination, the obligations of the Parties set forth herein regarding use and disclosure of Confidential Information shall continue for a period of two (2) years after the effective date of termination, after which period the duties of the Receiving Party with respect to Confidential Information it has received from the Disclosing Party shall be governed solely by copyright and patent laws, except in the case of software, for which the obligations shall continue until the occurrence of any circumstances listed in paragraph 5 hereof.

10. This Agreement is not intended to and shall not be construed as: (i) creating a joint venture, partnership or other form of business association between the parties; (ii) establishing a license grant of any kind from either party to the other except to use Confidential Information for the purposes set forth in this Agreement; or (iii) creating any obligation on the part of either Party to retain the services or to compensate the other Party in any manner, except as may be set forth by a separate written Agreement duly executed and delivered by the Parties.

11. Without prejudice to the rights and remedies otherwise available to the Parties, the Parties agree that monetary damages would not be a sufficient remedy for any breach or threatened breach of this Agreement by either Party and, accordingly, that either party shall be entitled to equitable relief, including injunctive and specific performance, if either Party breaches or threatens to breach any of the provisions of this Agreement.

12. This Agreement shall apply to any Confidential Information that may have been provided to the Receiving Party prior to the effective date hereof.

13. This Agreement is not assignable without the written consent of both parties. Furthermore, this Agreement shall be binding on the respective parties hereto and their successors and permitted assigns.

14. This Agreement shall be governed by the laws of the State of XX, except with respect to its choice of law provisions. In the event of any action or proceeding to enforce or interpret any of the provisions of this Agreement, the prevailing party shall be entitled to be reimbursed for the costs of such action or proceeding, including attorneys fees.

15. If any provision of this Agreement is found to be unenforceable, the remainder shall be enforced as fully as possible and the unenforceable provisions shall be deemed modified to the limited extent required to permit its enforcement in a manner most closely representing the intention of the Parties as expressed herein, and all of the remaining terms shall nonetheless survive in full force and effect.

16. The failure of either party to enforce any right resulting from breach of any provision of this Agreement by the other party shall not be deemed a waiver of any right relating to a subsequent breach of such provision or of any right hereunder.

17. This Agreement is the entire agreement between the parties and supersedes any and all prior or contemporaneous representations, agreements and promises, written or oral, between the Disclosing Party and Receiving Party, regarding the subject matter of this Agreement. This Agreement may be modified, amended or supplemented only in writing signed by both parties hereto.

18. This Agreement may be executed in counterparts, each of which shall be deemed to be an original, and all of which shall constitute the same Agreement.

IN WITNESS WHEREOF, the Parties hereto have caused this Mutual Non-Disclosure Agreement to be executed as of the date first set forth above.

AGENCY   **CLIENT**

By: _____   By: _____

Name: _____   Name: _____

Title: _____   Title: _____

Attachment B

SAMPLE RFP DECISION MATRICES (3)

Criteria	Weight
Agency Fit	**35%**
Does the agency work with organizations that are similar in size?	10%
Does the agency have success with similar organizations?	5%
Does the agency have experience with our toolsets?	5%
Does the agency express an interest in our mission?	5%
What was the size and makeup of the team proposed for our account?	5%
Do we think we'd have a good relationship with the people on our account?	5%
Strategic Insight	**40%**
Did the agency understand our organization's challenge as outlined in the RFP?	10%
Did the agency propose meaningful and customized (personalized) solutions to that challenge?	15%
Did the agency adequately answer every question in the RFP?	5%
Did the agency propose new ideas?	5%
Does the agency fulfill our reporting and analysis needs?	5%
Price	**25%**
What is the proposed retainer on an annual basis?	10%
What are estimated agency fees outside of the retainer on an annual basis?*	10%
Estimated agency compensation from other sources such as commissions?	2.5%
Was the agency transparent in their fees?	2.5%

Total	100%
*For direct mail, if you would like a comparison of production pricing, provide detailed production specs and samples of control packages (recommended 2-4, and no more than 6). Include specifications such as volume, postage treatments and whether or not any elements are gang-printed. Be as specific as possible to ensure a head to head comparison between agencies.	

Category	Weight	Example Scoring Questions
Strategic Approach	30%	Does the proposed strategy address our specific challenges effectively?
Creativity and Innovation	20%	Does the response demonstrate unique ideas or solutions we hadn't considered?
Cultural and Value Alignment	10%	Does the agency demonstrate alignment with our mission and values?
Budget and Flexibility	20%	Is the pricing transparent, scalable, and aligned with our budget? How can we ensure a comparable, measurable pricing structure (outlay of expenses) as pricing among agencies is very different?
Team Fit and Experience	20%	Do the proposed team members have the expertise and experience necessary to deliver results?

DIRECT MARKETING AGENCIES – Initial Analysis

Company/State	Mission Enthusiasm	Experience	Communi-cation	Efficiency	Relationship Building	Audit / Analytics	Website	Vendor Partner Engagement	Services	Likeable / Gut Feeling	TOTAL POINTS
Agency 1	2	3	3	3	3	2	4	1	3	3	27
Agency 2	5	3	4	4	4	3	3	3	4	4	37
Agency 3	2	3	3	3	2	2	3	2	4	2	26
Agency 4	4	3	3	3	3	4	4	3	4	4	35
Agency 5	3	3	3	2	2	3	2	1	3	3	25
Agency 6	4	3	3	2	3	4	2	1	3	3	28
Agency 7	5	5	5	5	5	5	4	3	4	5	46
Agency 8	5	5	5	5	5	5	4	5	4	5	48

Agency ratings 1-5:

5 – Excellent "goes the extra mile"
4 – Very Good, exceeds expectations
3 – Good, meets expectations
2 – OK, minimal
1 – No information or not discussed