

Selecting Counsel: Start with an Effective Request for Proposals

Creating a concise and clear Request for Proposals (RFP) is the first step in selecting counsel to best meet your needs and match your organizational culture. To accomplish these important goals in selecting counsel, an effective RFP should address two important questions:

1. **What organizational goals are you trying to accomplish?**
2. **What would you like to achieve when working with counsel?**

To be clear and concise, focus your RFP on four sections: Context, Request for Services, Outline of Expectations, and Submission Details.

Through these sections, you will be able to share with counsel who you are, where you need assistance, your desired timeline, your resources or budget parameters, key deliverables, and minimum qualifications for counsel.

Context

Provide a brief description of your organization and the significant activities and events leading up to the point of initiating the Request for Proposal. The context should give the reader a good sense of your organization and your goals in a complete yet succinct manner. If you are seeking assistance in conducting a campaign feasibility study, the projected fundraising goal of the campaign should be included, as well as an outline of the planning processes that have been used to determine a campaign goal and focus areas.

Request for Services

Clarity of vision is important here. Provide a detailed overview of what you want to accomplish and what you are asking of counsel. In other words, what is your desired outcome and how can counsel help you achieve this outcome?

The scope of the project and specific areas of desired assistance should be clearly defined. List the various components you might ask counsel to assist with, such as, strategic planning, case statement development, development audit, feasibility study, training and facilitation, etc. Share any parameters you may have already determined for the project, such as, timeline for completion and the engagement of internal and external constituents, etc. The more detailed you are with your request, the more accurate and complete your responding parties will be.

It is very helpful to share your budget parameters for the project. In rare circumstances, the budget is a non-negotiable and it is best for all involved to be upfront with this information to make sure you spend your time reviewing proposals that are realistically within your budget. Sharing your budget parameters allows counsel to frame responses in a realistic and reasonable way.

Outline of Expectations

Provide a detailed list of what you would like prospective counsel to submit in response to the RFP. Bear in mind, however, the more information you request, the more you will have to review. Typically, the requested RFP response will be a written proposal that addresses the following:

- Description of the firm's core competencies
- Description of the staff members who will form the project team, and their experience
- Firm-wide experience with similar projects
- Detailed scope of work including deliverables and outcomes
- Timeline to deliver scope of work
- Anticipated fees and expenses
- References

Submission Details

Close your RFP by providing details of how to submit the proposal and sharing information about the decision-making process to hire counsel. This section often includes the following information:

- Submission deadline – Allowing 30 days from when the RFP is sent is customary and provides time for counsel to give a thoughtful response to your particular situation.
- Contact information for questions – The quality of your responses will be improved by providing the counsel with an opportunity to reach someone who can provide detailed and accurate answers to questions about the scope of work and any details that may have been overlooked in the RFP.
- Submission guidelines – Provide details on where and how proposals should be submitted. Most RFPs encourage electronic submission of the proposal.
- Decision-making process – Explain how you will evaluate the proposals you receive and the selection process for hiring counsel. This typically includes a description of the interview process as well as the timeline for decision making.

Creating an RFP does take time, but making sure your RFP is comprehensive on the front end can help you find the best partner for your project – saving time in the long run.