



Selecting Counsel: Crafting an Effective RFP

Gathering the information you need to choose the best partner for your project calls for a clear and concise Request for Proposals (RFP).

An effective RFP should communicate:

- ▶ **the organizational goals you want to accomplish**
- ▶ **the outcomes you expect from working with counsel**

Organize your RFP in four sections: Context, Request for Services, Outline of Expectations, and Submission Details. These sections will describe your organization and the services you need, a desired timeline, budget parameters, key deliverables, and minimum qualifications for counsel.

Context

Briefly describe your organization and recent significant activities and events relevant to the Request for Proposal. This context should provide important background and your key goals in a brief snapshot. If you are seeking assistance in conducting a campaign feasibility study, include the projected campaign goal and an outline of the planning processes used to determine the campaign goal and focus areas.

Request for Services

Clearly define the scope of work. Provide a detailed overview of your vision and mission and how counsel can help you meet your goals. List the various areas you need assistance 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(s), including a timeline for completion or the engagement of internal and external constituents, for example. The more detail you provide in your request, the more accurate and complete your responses will be.



Share your budget for the project. If possible, be forthcoming with this information to avoid creation and review of proposals that are outside your parameters. Sharing your budgeted amount allows counsel to frame responses in a realistic and reasonable way—or possibly decline if their approach does not align with your budget.

Outline of Expectations

Provide a detailed list of what should be submitted in response to the RFP. Bear in mind that 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 project team members' 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

Finally, provide details of how to submit the proposal and share information about the decision-making process. This section often includes:

- **Submission deadline** – Allowing 30 days from when the RFP is sent is customary and provides time for counsel to prepare a thoughtful and detailed response.
- **Contact information for questions** – The quality of your responses will be improved by providing counsel with an opportunity to ask questions about the scope of work and clarify any details that may not be clear in the RFP.
- **Submission guidelines** – Describe how and to whom proposals should be submitted. Most RFPs encourage electronic submission.
- **Decision-making process** – Explain how you will evaluate the proposals you receive and select counsel, including the interview process and when a timeline for decision making.

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