How to Use the RFP Process to Plan Effectively

By Jason Boley, Senior Vice President of Systems and Operations

The formal process of requesting proposals for the purchasing of products and services can provide immense value to an organization. The RFP process can maximize the return on investments, shed essential insight into the internal operations and structure, and increase organizational success.

Understanding What You Need

Our experience with clients and vendors has shown that a structured selection process better prepares the organization for a project by defining the scope of work, outlining the technology ecosystem of the organization, and identifying potential barriers to success. Clarifying these items beforehand will result in a more accurate response about scope, timeline, and cost. As a result, the request for proposal (RFP) selection process often leads not only to better outcomes for our clients, but also to more transparent working relationships with the vendors.

Do you need an RFI or an RFP?

RFPs have a structured response process that is mediated by a procurement office to treat all respondents fairly. At the same time, organizations can do homework ahead of time to target platforms that most likely fit their needs. For organizations that are strictly “shopping” for systems, they might consider a lighter request for information (RFI) document that precedes an RFP to ensure that the RFI submitter and the responders to it become familiar with each other, thereby increasing the likelihood of a response to the formal RFP. An RFI is easier to respond to and allows vendors more freedom in their response than would occur in a structured RFP process.

Does your staff need support?

Many organizations are already resource-constrained in terms of staff and budget and don’t always realize the time and mind space requirements of a Constituent Relationship Management (CRM) selection and

implementation. Temporary project staffing can fill a variety of needs and is typically borne out of the organization's biggest gaps, which in many cases can be a lack of staff. This staffing solution can range from full-time to part-time staff augmentation.

Do you need an independent software vendor or an implementation partner?

An independent software vendor typically focuses on installing and configuring a technical solution for the organization. Their success is usually defined by having the software operational, the data converted, and moving the client to long-term maintenance. An implementation partner typically operates as augmented staff to the organization and assists with strategic direction and project oversight. An implementation partner tries to advance the business process of the organization by assisting in re-envisioning how the organization does its work. The worst thing that can happen in an implementation is that it simply mirrors the processes of the old system.

Do you need a software or development platform?

Historically, vendors have offered fundraising software solutions that function in a specific way and offer little flexibility. The functionality either met the organization's needs or it did not, and the organization would adapt their processes to the software. Modern development platforms have upended this paradigm by allowing organizations to design systems interfaces, add fields, and even design complex business processes. The result is a more customized and dynamic experience, but it can result in increasing the complexity of system projects if organizations are not adequately prepared for this change.

RFP Process and Planning Best Practices

BWF generally recommends that organizations focus on determining business requirements before authoring and issuing the RFP in order to define the project scope more completely. Business requirements gathering is a high-level review of the organization's technology ecosystem and identifies current limitations and desired future-state functionality.

Additionally, conducting business process mapping, which involves performing a "deep dive" into a specific business process is worth the effort. Business process mapping creates a workflow map of that current process, which is then used to design the desired process in the new system and identify necessary changes to improve efficiencies. While business process mapping is usually integrated into the implementation process once a vendor has been selected, diving deeper into these components in advance can sometimes inform and refine the overall scope of work required. For example, process mapping could identify if there are any unique or problematic processes that may impact the system selection. It is important to note that business process mapping is essential when transitioning from a server-based software platform to a cloud-based development platform. The transition is a perfect time to assess and improve processes that meet the goals and preferred workflows of your organization.

If your organization has conducted a full assessment of needs and decided upon a formal RFP, developing a concise and clear RFP that encourages a vendor response and has reasonable deadlines goes a long way to increasing the number of responses. It is critical to clearly outline milestone dates and to accommodate a period in

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which vendors can ask questions of the RFP issuer and have time to respond appropriately. RFPs with tight turnaround times may result in rushed responses or no response at all.

It's important to remember that an RFP is only part of the process; organizations will have additional opportunities to engage vendors during demonstrations and follow-up discussions. Overall, there are generally two types of planning.

- First, planning to purchase and move to a new CRM system.

- Second, planning for the successful implementation of the product chosen.

You can never plan too much but must also recognize that you cannot plan for everything.

The first phase is focused on more broad-based planning that defines needs, resources, timeline, and appropriate technology. We often recommend that a broad group of stakeholders participate in phase one; this should include leadership, division leaders, and a broad spectrum of people with a vested interest in the outcome. Including the opinions of key team members and leaders will be essential for long-term dividends.

The second phase is more focused and concentrates planning on migrating specific business processes, testing, launching, and change management. The migration phase must involve leadership sponsorship but will more heavily involve technical resources and business process subject-matter experts to guide the technical transition.

BWF has a dedicated team equipped to help your organization reach its full potential whether through a CRM analysis and conversion, prospect development, business intelligence and reporting, business process optimization, or data science and analytics. Want to learn more? Contact us today at bwf@bwf.com.

About BWF

BWF supports contemporary fundraising operations in achieving transformational growth through infrastructure, modern technologies that support data-driven decisions, and forward-looking structural roadmaps. Clients include universities, health systems, arts & culture organizations, faith-based organizations, and NGOs throughout the world. BWF has a team of consultants with extensive background and experience in every facet of philanthropy. For more information, please visit bwf.com.

About the Author

Jason Boley, senior vice president of systems and operations at BWF, specializes in technology, data management, reporting, and business process definition. Jason brings a unique blend of fundraising expertise and information technology skills developed over two decades of working with private colleges, public research institutions, healthcare foundations, and libraries.

Jason is a recognized leader in all aspects of development operations and is active in several professional organizations where he speaks frequently at the local and national levels. Jason has chaired the Association of Advancement Services Professionals survey committee and has served on the association's committee on industry best practices. He also served as faculty at CASE's Summer Institute in Advancement Services for five years. Previously, he served on the faculty of Apra International's Data Analytics Symposium and the CASE Gift Processing and Records Management Workshop, and he chaired Apra's Analytics Body of Knowledge initiative.