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Moving from RFPs to RFIs for equity and affordability

By: Laura S. Quinn

We need to reconsider the approach to hiring consultants and firms for nonprofit work. The traditional open Request for Proposal (RFP) process, while familiar, is no longer serving us effectively. It's outdated, inefficient, and, most critically, inequitable.



Laura S. Quinn

When nonprofits issue standard open RFPs, they often miss out on the very firms that could be most beneficial: high-quality, busy companies with streamlined operations. These companies, often smaller ones, can often provide solutions at a lower cost. These smaller firms are also the ones more likely to be run by women or people from underrepresented populations.

I suggest instead that nonprofits use a two-stage process. First, issue an open Request for Information (RFI) to get information from a more diverse set of firms. Then use the responses to winnow down your list to a set of four to ten top contenders, and ask them for a detailed proposal. This process is no more time consuming for nonprofits, would save the sector millions of dollars in project costs, and could provide even better results.

If that's enough to convince you I've put together [a template for RFIs \(in partnership with Prosal; free registration required\)](#). Otherwise, read on.

What's the problem with RFPs?

Before you automatically issue a standard RFP the next time your nonprofit seeks outside help, consider your values. If you want to give a hidden advantage to larger companies that can afford to have bigger dedicated marketing teams that can submit more proposals, then using an RFP will work. But if you want to level the playing field for smaller, high-quality firms that may be both more affordable and local, then think about the advantages of using an RFI process.”

Smaller, high-quality firms often simply don't respond to open RFPs. Writing a full, detailed proposal is time consuming—often requiring eight to 20 hours or more—with a low probability of success. For many projects seeking proposals, a firm can be one of dozens responding. A proposal-based approach is financially unsustainable for many smaller firms, leading them to ignore RFPs unless they have a strong reason to believe they stand a good chance of winning.

Smaller firms that choose not to respond to RFPs are often community based. They're the ones that may be local to you, or run by people within the community you serve. Smaller firms are disproportionately more likely to be run by women or people from underrepresented populations.

On the other hand, firms that do respond typically have dedicated sales and marketing teams, or are less-established firms seeking work. While some of these proposals may be from firms that see a particularly good fit, the process itself blocks participation of the larger pool of potential candidates that could excel on a project. The RFP process favors larger firms with more resources, often sidelining smaller, yet great, teams. It's inherently inequitable.

As if that's not enough, the inefficient system wastes millions of dollars in writing more detailed yet still fruitless proposals. Firms need to recoup the expenses of proposal writing, which drive up project budget— costs that nonprofits ultimately bear.

A two-stage process: introducing RFIs

I suggest using a different proven process that involves two stages. It begins with an open RFI distributed widely through your community, including groups that gather to talk about your sector, and proposal platforms like [Prosal](#). An RFI is a more equitable, time-efficient way to gather high-level information about potential firms. Using an RFI helps you as a nonprofit in significant ways:

- As noted above, it expands the pool of firms willing to submit and reduces the costs that would be passed to the nonprofits.
- It allows a nonprofit to do a scan of firms interested in the project and collect an understanding of their relevant qualifications and experience.
- Information submitted can inform the actual RFP issued in the second step, below.
- Lastly, if the project you have outlined in your RFI isn't feasible or well conceived for some reason, responses to your RFI can make that clear. You can then incorporate these valuable learnings into your RFP, rather than starting an entire RFP process over again.

After receiving responses to the RFI, you can narrow down to a manageable group of candidates—perhaps four to ten organizations. At this stage, asking these selected firms for detailed proposals in response to an RFP makes sense—they know they have a reasonable shot at the project. Sometimes a detailed proposal might not even be necessary; phone interviews could suffice to make the final decision.

Crafting an effective RFI

RFIs are easier to write than an RFP, as the firm won't need enough detail to provide costs. In general, RFIs should include:

1. A clear overview of your project, including goals, general budget, and timeframe.

2. Easy to answer questions to understand firms' experience with projects at your price point, and potentially with your type of organization or community.
3. Request for relevant case studies to demonstrate firms' achievements and expertise.
4. One or two straightforward questions to understand firms' general methodology or experience in similar projects.

The goal is to ask questions that firms can answer with existing materials. Case studies are particularly useful, as firms typically already have them written up, and you can use them to see what a firm thinks is important, and how close its “most relevant” items are to your actual project.

Avoid requesting a specific budget or an approach to your own requirements in the RFI, as this reverts it back to an RFP model. Defining an approach and estimating a budget is time consuming, and it will deter many firms.

The benefits of RFIs

Using an RFI is like the process of hiring a new employee. It starts broad, inviting a range of interest with the cost barrier of a full proposal removed, and then delves deeper with selected candidates. This not only saves time in the long run, but also aligns more closely with the goals of nonprofits—fostering a fairer, more inclusive, and efficient system.

It's time for nonprofits to move away from the outdated, inequitable RFP process and embrace RFIs. This shift is important not just to ensure broader and more inclusive participation, but to lower the costs related to RFPs for both firms and organizations. Ultimately, this benefits the entire nonprofit sector.

Resources

- [Request for Information Template](#) (Prosal)
I put together this Google Docs template, in partnership with the proposal platform Prosal, as the logical next step to help organizations adopt an RFI process.
- [Do these two things before asking a BIPOC consultant for a proposal](#) (Valerie Navarret)

Valerie Navarret asks white-led organizations to consider some of their core processes, including traditional RFPs, if they want to diversify the consultants they work with.

- [In Vendor Evaluation, Don't Shortcut the RFI Process](#) (Strativa)

The business world already uses RFIs far more than the nonprofit sector. This article, geared specifically to businesses choosing large software packages, makes a virtually identical argument as to why it's important to start with RFIs before moving to RFPs.

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