

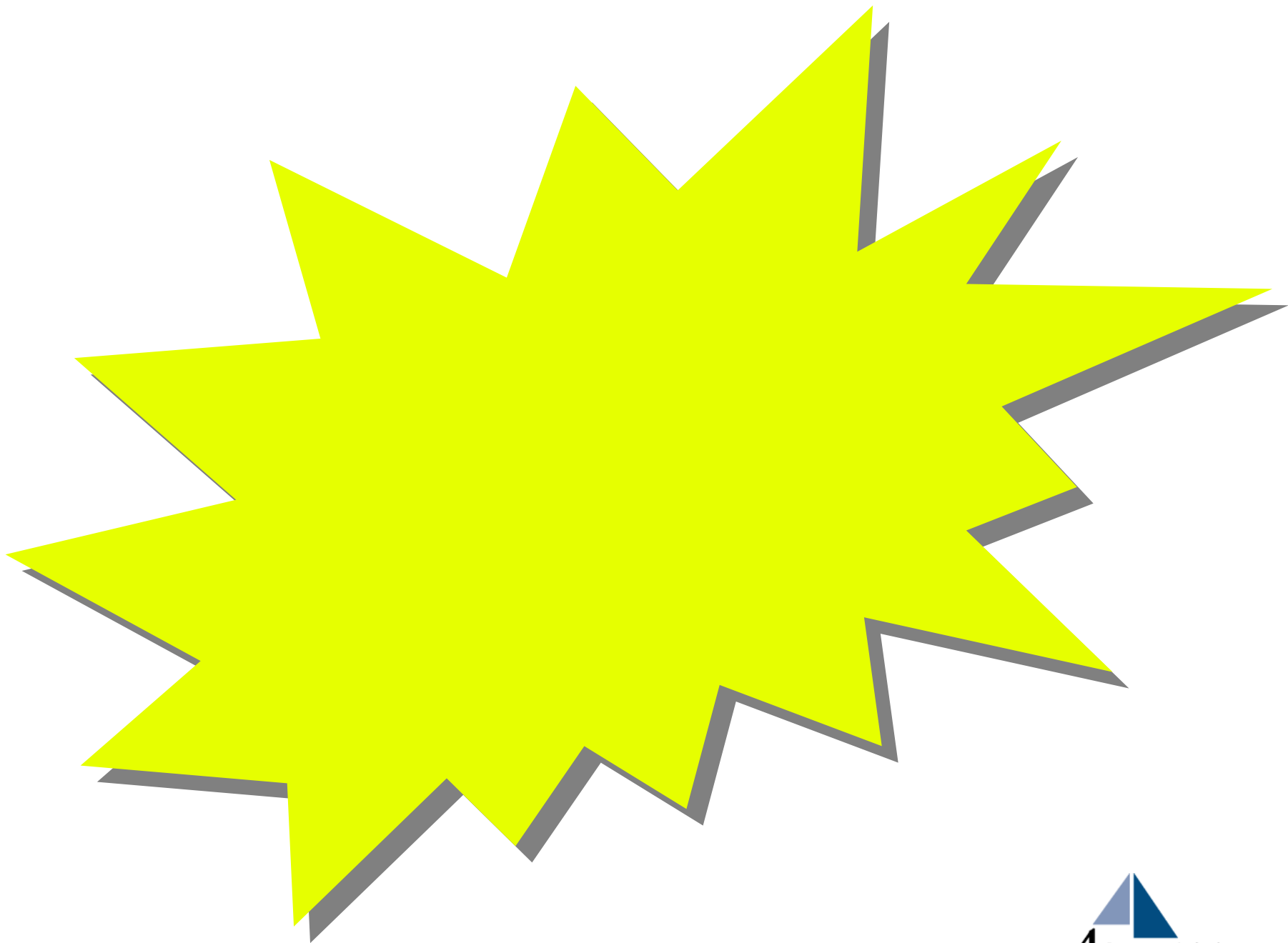
# Nonprofit Technology Strategy

## How to Write a Nonprofit RFP

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# Overview

- ▶ The spirit of this webinar
  - We are iterating :^)
- ▶ What is an RFP?
- ▶ Why bother?
- ▶ Anatomy of an RFP
- ▶ Recommended RFP Process
- ▶ Our template and how we can help

# What is an RFP?

- ▶ “Request for Proposal”
  - You saying what you want to build/acquire
- ▶ A rallying point for organizational alignment
  - Get your internal house in order first
- ▶ A focal point for accountability
  - Verbal data is worthless
  - Projects have long horizons
  - RFP's can be the anchor

# Why Bother with an RFP?

- ▶ Too many nonprofit organizations go looking for technology solutions without first knowing or articulating what they are looking for
- ▶ A properly constructed Request for Proposal (RFP) is a critical process component in acquiring technology that meets both your needs and your budget

# Nonprofit Technology Myths

- ▶ Tech sourcing is like pizza delivery
- ▶ Tech platforms work like cars
- ▶ It's an appliance not a garden
- ▶ Someone else knows what we need
- ▶ The tool we need exists, we just need to select it
- ▶ Techies have the answers

# What does an RFP represent?

- ▶ Clear statement of your vision
  - Don't take that for granted
- ▶ An understanding of your business processes
  - Writing it down is excellent validation
- ▶ A shared vocabulary that should span the life of the project and beyond
  - Language that bridges understanding across the organization

# The Larger Process

- ▶ What comes before your RFP is ready?
  - Teasing out the mandate
  - Formalizing the functionality
  - Vetting the requirements and process
- ▶ What happens after your RFP is ready?
  - Distribute (widely :^)
  - Review proposals
  - Select a vendor
  - Execute the project



# How do you build an RFP?

- ▶ Have a point person
  - They need to drive the process (hard)
- ▶ Have a communications plan
  - Engagement is crucial
  - Transparency is priceless
- ▶ Know your target users
- ▶ Follow a process like the one here
- ▶ Rinse, repeat until ready

# Anatomy of an RFP

- ▶ Organization Info
  - Contact Info, Organizational Background
- ▶ Project info
  - Name, goals, timeline, stakeholders, etc
- ▶ Deliverable info
  - Types of users and needs
  - Supplementals – site map, wireframes, etc
  - Requirements
- ▶ Submission info
  - What, when, how, etc

# Contact Info

- ▶ Requesting Organization
- ▶ Primary Contact
  - Name
  - Title
  - Phone Number (not your cell!)
- ▶ Email address
  - Best to use non-personal email
  - e.g. rfp-project@orgname.org

# Organizational Background

## ► Essentials

- When founded
- Location(s)
- Number of staff

## ► Mission

- You want to work with a vendor who cares about what you do

## ► Programs overview

- What are your actual activities (briefly!)

# Summary of Project

- ▶ Name of project
  - e.g. "Aspiration Web Site Redesign"
- ▶ Organizational goals of the project
  - What does success look like?
- ▶ Sponsoring orgs or other partners
  - Who else is involved, cares?
- ▶ Other relevant project information
  - To successfully deliver appropriate solution

# Target User Profiles

- ▶ Who are the TYPES of users who will use the deliverable?
  - AKA “Personas”
- ▶ What are their goals in using the system?
  - What does success look like?
- ▶ What else is relevant about them?
  - Are they tech savvy? On slow connections? Using mobile? Security sensitive?

# User Stories

- ▶ Once you know WHO, you need to specify WHAT the deliverable does
  - Per user profile
  - There will be overlap
- ▶ We do this with “User stories”
  - A single sentence which describes a specific way the user interacts with the system to get benefit or value
  - Focus on what they can do, not how they actually do it

# User Stories

## ► Benefits

- Describe functionality in language that makes sense to all project stakeholders
- Create “minimal essential vocabulary”

## ► Utilization: these can be employed...

- As line items in proposal budgets
- For project management and tracking of what has been completed/not completed
- For Feature prioritization
- For ... You name it!



# User Stories – An Example

- ▶ LearnPhilanthropy.net
  - Resource hub for grantmakers and learning resource providers
- ▶ 3 + 1 User profiles
  - General user
  - Grantmaker
  - Learning Provider
  - Platform administrator

# User Stories - Examples

| Learn Philanthropy Platform User Stories   |   |
|--|---|
| General users of the site will be able to: |   |
| Use the LP site and help to improve it by  |   |
|  | View a page on how to use the site                          |
|  | Provide feedback to <u>LearnPhilanthropy</u> about the site |
|  | Viewing a Resources overview page                           |
|  | Viewing a Providers overview page                           |
|  | Viewing a list of recent LP blog posts                      |
|  | Viewing the LP blog   |
|  | Commenting on LP blog post                                  |
|  | View a list of recent Tweets                                |
|  | Viewing "About" pages                                       |

# User Stories - Examples

| Learn Philanthropy Platform User Stories                           |                       |
|--|-----------------------|
| Find and review learning resources by:                             |                       |
| Browsing an interactive catalog of available learning resources by |                       |
|  | Name                  |
|  | URL                   |
|  | Description           |
|  | Date Added            |
|  | Topic Area (RST)      |
|  | Type                  |
|  | Target Organizations  |
|  | Target Audiences      |
|  | Publication Date      |
|  | Provider              |
|  | Delivery Format       |
|  | Public Availability   |
|  | Public Cost           |
|  | Member Availability   |
|  | Member Cost           |
|  | Practice Level        |
|  | <u>Subsector</u>      |
|  | Location              |
|  | By learning framework |
|  | Other criteria        |

# User Stories - Examples

| Learn Philanthropy Platform User Stories  |                           |
|---|---------------------------|
| <u>Grantmakers</u> using the site will be able to do the following, In addition to the above: |                           |
| Manage a profile on the site by:  |                           |
| Creating an account by providing a user name and an email address                             |                           |
| Maintaining a profile which includes  |                           |
|   | Name                      |
|   | Organization              |
|   | Picture                   |
|   | Email address             |
|   | Facebook URL              |
|   | Twitter URL               |
|   | <u>LinkedIn</u> URL       |
|   | Blog URL                  |
|   | Areas of interest         |
|   | List of "liked" resources |
| Viewing a custom home page with relevant new items  |                           |
| Receiving notification when relevant new resources are added to the site, via                 |                           |
|   | Email                     |
|   | RSS                       |
| Controlling whether and how they receive notification of new learning resources               |                           |

# Supplemental RFP Elements

- ▶ While not required, these are valuable
  - In the spirit of “make the first bid”
- ▶ Site map
  - How do you think the info should be organized?
- ▶ Wire frame(s)
  - Block diagrams of how you envision pages
- ▶ Related sites
  - Inspirations, allies, opponents, etc...

# Requirements

- ▶ In addition to user stories, there are things “it must do”
  - Support for specific technologies/formats
  - Integration with other systems
  - Accessibility
  - Scale
  - Licensing

# The Aspiration RFP template

- ▶ Based on dozens of engagements, we have developed an RFP template
  - Many thanks to allies including MGP DIRECT for inspiration and ideas
  - Our RFP philosophy is one of "essential coverage", not "verbose completeness."
  - Designed to generate a 5-10 page RFP document that can be used to solicit proposals and lead to follow-on discussions with prospective implementors.

# The Aspiration RFP template

- ▶ You can download it here:
  - <http://www.aspirationtech.org/training/workflow/templates/rfp>
  - It is a work in progress :^)



# What do you do once you have an RFP

- ▶ Circulate to trusted advisors, tweak accordingly
- ▶ Distribute (widely :^)
- ▶ Answer questions
- ▶ Take submissions
- ▶ Review proposals, get clarifications
- ▶ Select a vendor
- ▶ Execute the project

# Who can you send your RFP to?

- ▶ Contact us for a list of our favorite vendors
  - We trust them
  - They are values aligned
  - They are good communicators

# How can Aspiration Help?

## ► RFP Coaching

- We help you fill out the template
- It's a sweat equity model :^)

## ► Our other free services

- Proposal reviews
- Technology divorce and relationship counseling
- Ad-hoc answers and referrals

# End Of Webinar

- ▶ Questions?
- ▶ Comments?
- ▶ Email us:

[help@aspirationtech.org](mailto:help@aspirationtech.org)

## Thank You!

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# Thank You!