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Left to right: Todd Baker, Rick Christ, Mark Rhode, Cathy Finney, Paul Colery

AN NPT EXECUTIVE SESSION

THE RFP PROCESS: IT CAN LEAVE YOU HAPPY OR BRUISED AND BATTERED

The process for finding a new vendor for any major undertaking, such as fundraising, puts strain on both the charity and the for-profit. Lately that friction is getting worse, with both sides accusing the other of dirty dealing.

What should be a courtship has often turned into a WWE death match. The process is expensive in both staff time and real dollars. It also is resulting in disclosures that neither side should have to make.

The process breakdown was the subject of an *NPT* Executive Session discussion. Around the table were: Todd Baker, vice president, strategic services at Resource One in Tulsa, Okla.; Cathy Finney, deputy vice president, strategic services, at The Wilderness Society in Washington, D.C.; and, Mark Rhode, vice president of Russ Reid in Pasadena, Calif. The discussion was led by *NPT* Editor-in-Chief Paul Colery and Rick Christ, vice president of Amergent in Peabody, Mass.

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Paul Colery: From the calls I've been getting lately, putting out an RFP today is not a process but a bludgeoning. It looks like more of a start of a negotiation rather than an actual proposal. On the charity side, they are using the RFP to get a better deal with their current or a new vendor. On the agency side, we've seen some, well, let's say less than candid RFPs, particularly on the pricing side.

We brought you together because you've always been in the middle of all this. Todd, what have you been hearing about the whole process?

Todd Baker: I've got a lot to say about this. I've been on all sides of this -- the nonprofit side and the agency side. It's a flawed process. It's broken. I don't think the charities do a good enough job of really assessing what they really need in a partner. They just send out an RFP they get online. The last five RFPs I've responded to have been identical, but by different nonprofits. That tells me the same RFP is just getting sent out and usually no one follows the process.

The nonprofit doesn't follow the process that they set up. They make exceptions. The agencies don't follow the process. They don't respond to all the questions. So, the whole process is flawed.

And I would agree with you, Paul. They're using it in a way that isn't really trying to find a true partner. They're trying to have leverage on their current partner and get them to lower their rates. Or, they've already identified a new partner but because their board policy says they have to have three bids they go out and get two more.

Agencies spend a lot of resources. You wouldn't believe it. One agency I used to work for would spend \$50,000 on the RFP process. That's for one RFP.

Colery: Cathy you've been on both sides of this, too.

Cathy Finney: Right now I'm on the organization side and I just recently did an RFP to identify a move to a new agency partner. I did that right when I started at the Wilderness Society.

It wasn't something I decided to do. It was in place before I came in. We were absolutely going to RFP this agency partner.

I think we need to talk about the motivations for RFPs because they are very different sometimes. You mentioned board mandates -- that many times you are forced to RFP your partner every three or five or how many years. Many times in those cases you could be perfectly satisfied with your agency partner, yet you're still forced to go through the dance. You could have great performance and a strong working relationship, but still have to go through this heavy lift process and there's a lack of managing expectations.

The whole process feels convoluted. I think we really need to simplify what's happening here.

Colery: I'll take you back to a word you just used, "partner." It's nice to say "this agency" or "this business is our partner and we're going to partner..." There's really not a partnership there. There are two sides to the discussion -- the agency wants to make money while providing a service and you want to do whatever it is you're doing for the RFP. Can those really be mutually inclusive?

Finney: I like to say it's a partnership because we're partnering to achieve common goals. We are both working toward the good of the organization. I don't like to refer to the people with whom we work as vendors. We have a relationship with the folks who we work with, and to minimize it, to say "Oh they're just a vendor" is not conducive to building a strong relationship I don't think.

What we're looking for is a good fit. I believe there's a level of competence that exists among most agencies. I don't find that there are agencies that are intentionally doing a disservice on behalf of their partner organizations. Perhaps there are, but my assumption is that the agencies with whom we're going to look at to partner will have passed the initial competency test.

Back to what you said, nobody is doing a good enough job evaluating needs. What do you need right now and who can you work well with? We're not getting to those answers through the RFP process that we go through right now.

Mark Rhode: One of the issues of



A lot of nonprofits don't mean to be so one sided.

--Rick Christ

using the term vendor or partner, we do our best work when our clients view us as trusted advisors. When there is that sense of partnership we are able to invest more and we have more skin in the game.

Clients appreciate that and believe this fosters a stronger relationship that allows them to be more successful. That's our view on partner versus vendor.

I also think that the RFP process is flawed. It's too complicated. It requires tremendous resources and work on both the nonprofit side and the agency side. It's not an effective way to achieve a goal.

What needs to be found through the RFP process is an alignment between the nonprofit and the agency partner. There needs to be best practices and a more efficient methodology to achieve that alignment. That's what I'd like to see the industry move toward. I think there are some relatively easy things we can do as an industry to achieve that.

Baker: Such as?

Rhode: Establish an RFP best practices protocol in which the major players in the industry agree to basic principles and procedures. We might view this protocol as a standard, not that everyone has to follow it exactly. Certainly all the questions and topics would be different but the process of going from A to Z could be standardized to some degree so that there's less waste in the process.

Colery: You just said a phrase that makes me want to slam my head down on the table: "best practices." We always hear, "we need to do best practices." This is not a new industry. People have been raising money, whether it was in the Stone Age when they were trading

rocks, to today where they're trading cash. There's always been a fundraising process. And we have some great minds in the industry both on the nonprofit side and on the agency side. Why isn't there a best practice?

Rick Christ: In particular the past five years, we're in an age where each agency is working very hard to keep its clients happy and to try to get new clients. The demand on growth, or the acquisition of new clients, is very great. We're competing for a lot of new business and we're spending a lot of money on it. You mentioned \$50,000, Todd. Mark and I were talking before and each of our companies have spent in excess of \$50,000 on the process.

Colery: But isn't that really a phony number because you've already employed people for this and they're just putting their hours in.

Christ: It's not phony because there's an opportunity cost. What else would we be doing? We'd be raising money for our clients with those people. If 10 agencies compete, and each invest \$50,000 and we all know of RFPs that have had more than 10 agencies -- 20 agencies -- but if 10 compete, for \$50,000, that's a half million dollars.

The organization can easily spend \$50,000, hours that these people are paid anyway but are not running events, not talking to major donors. Who's paying for that? The donor is paying for that, or people aren't getting fed, the land isn't getting preserved.

Colery: There is an agency, and some of you might know the agency, that recently signed an \$18 million contract with a very large national nonprofit. It would seem to me that if you're going to score \$18 million, 50 grand is a spit in the ocean. If you're going after business like that, I wouldn't be whining about the \$50,000 opportunity cost.

Christ: I'm not whining about the \$50,000 opportunity cost on account work where there is a good alignment, where there is an \$18 million deal. There's an awful lot of this stuff where the contracts are worth \$1 million or \$500,000 and we can compete on five or 10 of these RFPs, to get one or two clients. The average would be one client for every 10 or 15 proposals. And we're allowing ourselves to be commoditized when we really aren't a commodity.

Baker: There's a reason why we haven't had best practices. These are highly strategic ventures for agencies. There is a strategy from the very moment you get an RFP from the agency side, all the way up until you win the business. An analogy would be if all the NFL teams ran the same exact offense

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What we're looking for is a good fit.

--Cathy Finney

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and just had a standard best practices of fence. No team is going to do that because they have different strengths. They might have better wide receivers than the other teams. It's one of those things where we would have to, in a sense, almost share our strategy regarding how we approach our piece.

Rhode: Rick mentioned commoditization of the products and services we deliver. I want to applaud him for that term. We talked this morning about price competition. It's not like agencies are airlines both competing to take someone from New York to L.A., and Delta is one price and American is another. Our services and products are unique, offering clients value-added intellectual property. For the process to align a charity with an agency, it should be different than the process that we have. It should be more efficient and allow the charity to have confidence they have made the best choice.

Christ: Some RFPs are too vague and we can't get a feel for what the organization really wants. It might be a reflection that they're not sure. Others are so specific that it's really fill in this box, fill in this box, fill in this box.

My thinking is if you know that much about what you need to do, that's fine. That's not how I shop for groceries. I go to the produce aisle and see what's fresh, then I organize the rest of the

meal around it. If I wanted pork chops, someone can always bring me pork chops at the lowest price. Those are not pork chops I want to eat.

With the explosion of channels for fundraising and of technology to help us channel data and make sense out of it, agency work is far from a commodity product. It's far from the product that we were delivering even five years ago. Best practices, if there were any five years ago, need to continue to evolve so that we're able to have a clear, open discussion.

One of the big problems is, if Cathy wrote an RFP for an agency and if her organization required that somebody in purchasing manage it, I could not say, "Cathy, what do you mean by this" or "would you consider this an alternative," because I'm not allowed to talk to her. I might or might not ever get a clear question answered.

Finney: You might not even be able to speak to me, right?

Rhode: It makes your investment of \$50,000 or more less meaningful because you have little control of the outcome.

Clolery: You have a disinterested third party in the middle of this?

Finney: It's also another cost that we've got to consider and that might not be helpful in all cases. Again, how much money are we spending to go through

this process and how many staff hours are we sucking up to manage this process? As I said, the entire process is a heavy lift. The more people you involve in it the more heavy it's going to be.

Rhode: There are some practices that represent low-hanging fruit. If we were to address a few issues it would get better quickly for everyone. For example, we might limit how many agencies the nonprofit asks to participate in the RFP process.

Clolery: How many do you see now?

Rhode: 20, 23, 14 ...

Clolery: That's insane.

Rhode: When you find out there are 25 competitors, you know you're facing a major investment to complete the RFP process. You have to ask yourself: "What is the winability factor for the agency?"

Clolery: Does that come back to what Rick was just saying a few minutes ago about there being so many explosive channels that no agency can handle them and therefore you need the 25?

Rhode: That can be a part of it. But there's no reason to have 25 agencies go through the process.

I think there should be a protocol that says there should be a maximum of eight.

Or 10 or 7 or 11 -- pick a number that is reasonable -- and that would be one starting point. Another one would be, there should be some reasonable interaction between the future agency partner and the client other than a group email answering 100 questions that are an aggregate from all 25 agencies.

It would be helpful to have some meaningful communication process so that they could get their questions answered and maybe say: "We're not in alignment with you. We should back out because we realize now having read the material that we're not offering the services you need in the way we think you want them."

Clolery: Should the agencies be doing their own due diligence? For example, there is a large nonprofit that has a new CEO. This individual put everything out for an RFP and, gee, here's a surprise, the agency that got the job was the agency this individual worked with in a previous job. Should the agencies be doing enough due diligence so that they don't get into that kind of sweepstakes?

Rhode: They should and we try to but we don't always do it well. We periodically say thank you but we're not going to proceed because we learned something that tells us, it's not likely that our investment -- time and money -- would result in a win.

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Clolery: How often is the process already wired, that you know somebody's going to get it?

Finney: That goes back to my original statement about there's not enough honesty in the process. The onus of that honesty lies with the client, lies with the organization. There's not enough truthfulness there. When I've gone through the RFP process, I'm as honest as I possibly can be without providing any sort of advantage to one group or another. And every time I've entered into our RFP processes not knowing where we were going to go. If you go in with an open mind you're often surprised when you're going through the process. You might have a suspicion about who might be the frontrunner and then you get the next part of the process and somebody comes into present and then everything is up in the air again.

Sometimes you're forced to go into that process and you don't really want to go. This gets us back to my original statement about motivations -- why are you doing it and should you really be entering into the RFP process at this point?

Clolery: How long is the process in general?

Finney: We did ours in 45 days. It was tight. We needed to do it before we went into the new fiscal year.

Christ: I think 90 days is typical. We're often skeptical when we see an RFP with a very tight timeframe. Because the likelihood is...

Finney: Then you think the outcome is already determined.

Christ: That's one indication. The other is that it's not likely the organization is going to be able respond in time and it takes a lot of wind out of our sails. Our proposal has to be there by 5 p.m. on Wednesday and if it's there a minute late we're disqualified. Then, they say a week later they're going to send out invitations for round two, and it's six weeks. Now you have 23 proposals, each of which are 45 pages. I couldn't get through it in a week, either. It was unrealistic from the start.

I prefer to think of it as unrealistic. We're left hanging for a while and don't know what's going on. And they'll say, "Can you come in next week?" Well gee, it would have been nice to have two weeks notice, maybe save a little on airfare and put together a better presentation.

A lot of nonprofits don't mean to be so one sided. They just don't see what the needs are from the agency standpoint to get it done. If we had a general rule that says you ought to allow for 45 days, three weeks for this part of the process, three weeks for this part of the

process, I think more organizations would pick more reasonable dates.

Finney: We were driven by the need to make a change before the first quarter of the fiscal year. It was an arbitrary deadline. And I know that put the agencies at a disadvantage because it wasn't giving them a lot of time. We streamlined ours significantly. I didn't want proposals that were longer than 10 pages and we kept the pool small.

Clolery: It's almost as if there's a feeding frenzy at the top, and the guys much lower on the food chain are pretty much getting few nibbles from the top agencies because the profitability is not there.

Baker: I don't want to come off as if I'm bashing the nonprofit side of things, but I would like to share that the nonprofits really have the control of correcting the problem, not the agencies. The agencies have self governed, have put protocols whether it's written down or it's a gut feeling. Like Rick was saying, tight time frames, vague RFPs, are red flags for me. If they don't even want to take my phone call, if they don't want to see me in person, they don't want a partner.

On the agency side, you're in a bad predicament because if you just blow them off, or you just say "No thank you," then you might have burned a bridge there.

We just had an RFP process where we have one part of the business, and we kind of knew that this client was going to give it to this other agency but we felt like we had to participate all the way to the end. And sure enough, they gave it to that group.

Finney: Why did you do that?

Baker: They were a client already. We do significant work with them. They have another aspect of their business that they just put out for RFP. We knew that there was this inside agency that was going to get the business, but we ended up having to go all the way through it.

I'm not saying we should have gotten it or there was anything inappropriate, but you know you just call it. You know what's going to happen because you see networks and relationships and, like you said, that relationship will be taken on to the next project or the next job.

It's just the nature of the business. There's a lot of work that the nonprofits can do to make it simple for them and have more integrity in the process.

Rhode: If a nonprofit is simply doing an RFP to satisfy a board requirement they can't acknowledge that openly to the agencies or they violate the whole point of getting multiple bids from three to five agencies.

I think it would be a nice practice and maybe a suggested recommended protocol that if they know that, rather than



Some RFPs are looking for a strategic approach to the business to turn their situation around.

--Mark Rhode

bring a lot of agencies in for a multi-layered, expensive process, that they do a truncated version of the RFP process that would allow them to maybe look at maybe five, then three, and then pick one.

Likely, they will pick the incumbent. The incumbent has an advantage. Maybe they can focus the decision around pricing if that's their objective.

Finney: The other issue is times when organizations go through the RFP process fishing for ideas.

Rhode: I won't say who it is, of course, but I heard someone from one of the major nonprofits say in public that one of the things that that person likes about the RFP process is that it allows them to get exposure to intellectual property for free.

That was one of the reasons why that person wanted to do the RFP. That shouldn't be the motivation. The motivation should be alignment, confirmation of the right partner.

Clolery: Is that not a process where you really can't help but learn from the intellectual property of the agencies because if you're going to come in and say, "We've got these bells and whistles and you're going to want to find out how you're going to use them."

Rhode: I think it has to do with moti-

vation. It gets back to the issue that you talked about with honesty.

Clolery: If you're an agency and you believe you've got some sort of system that no matter what can get blood out of a stone, and you're pitching your services, don't you have to show your hand?

Rhode: You're illustrating your value proposition and why you believe your services are more aligned than someone else's services. I think that's a good thing to do. Some RFPs are looking for a strategic approach to the business to turn their situation around.

We haven't talked yet about spec creative. All of us have either received or given spec creative. I think that's appropriate in some cases but it should be for the finalist only and it should be for a limited number of finalists.

Christ: There ought to be an offer by the nonprofit that "not only will we not use your creative if we don't hire you, but we'll destroy it. We'll return it to you."

Finney: Or, "if we are interested in having it developed further..."

Christ: "We'll pay you to do it."

Rhode: I think those are all great outcomes.

Christ: We frequently have to sign and attach to a variety of practices and behaviors, everything from non-discrimination to promises with respect to data security and we're willing to do that. Why can't the nonprofit sign something saying, "Here's what we promise to do to show our authenticity in this?"

Baker: Nonprofits hire agencies for two reasons, for creative and strategy. Because they have severe data issues they make that the leading reason why they've chosen some group, regardless of whether they had creative and strategy. That's the whole thing about assessing your needs. You don't hire an agency because they have great data solutions. Nonprofits do, but that's because there's been so many data problems in our industry that we've had to evolve that way.

I don't mind sharing our ideas and our creativity with respect to the clients. That's why they're going to hire us. I want to get in front of them, early on, and share with them our ideas and our strategy.

Many of the big organizations that just had an RFP are declining. They're not growing. Some of these established nonprofits don't really want to know what other ideas are out there. They're staying with their same old tried and true agencies, or they have this process that's not appropriate and so they're missing out on the new bright minds and great ideas that are out there in the marketplace.

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Clolery: When I came to this sector I was stunned at the conferences and how all the agencies and nonprofits were willing to share outcomes. It wasn't just, "we've got a gazillion dollars" but "here are the five steps we took to get this gazillion dollars." I've seen that devolve. What do you think about that?

Baker: I've been doing this for 27 years. You have to have a heart for this business. I can't possibly work with every nonprofit, so, I write a lot. I speak a lot. I should willingly share my information. If it helps Russ Reid, or if it helps Grizzard, or some other group, great, because it's going to help their clients and it's going to help grow our industry.

We need to elevate our industry through education. Every good fundraiser needs to know how to write and speak. As an industry, we are far from creating these people who are knowledgeable enough. You just said many of the nonprofits aren't even profitable to work with. So, what do we have to do? We have to educate them. We have to teach them how to stand on their own. That's what has driven me in this market.

Clolery: We know that three quarters of the nonprofit sector generate less than \$5 million in total revenue so we can take them off the table. Are the agencies really looking at a pool of maybe 2,000 organizations that they can afford to go after?

Christ: It's bigger than two, but far less than 10. I've spent a lot of time telling small nonprofits in the niches in which we work that we would not be good stewards of the donors' money because the flat costs of serving them are too high based on their revenue stream.

We have a cutoff not just because of profitability for us, but because we don't ever want to be in a situation where someone says, "Why is half the money you are raising for this client, or three quarters of it, staying with the agency and not going to the nonprofit?"

Even if the answer is very simply, "That's what it cost to raise that money and we were good stewards with their money," it smells really bad. And so we want a client where we can have a big impact and the work is the same, the strategy is the same, whether you've got raising \$1 million or \$10 million. The cost to write a good direct mail letter and a few emails to support it, and create the graphics for that, is the same whether you're mailing six of them or six million.

There are times where we have to tell the nonprofit, "You're too small," or "We're too big." We probably ought to do the same thing on the other end and say, "You're an organization that raises \$800 million a year, we probably don't want your business anymore than you think

we do because you're just too big for us."

Rhode: We work with large clients and we also work with small clients in two verticals: food banks and rescue missions.

Clolery: But in many cases it's going to be the same package, it's just going to change from Des Moines to Corpus Christi.

Rhode: It's not the same package. It's the same strategy with unique creative customized to the local market. It's a strategy that's proven and it works just as well in Tulsa as it does in Des Moines.

Christ: What if we took 15 different RFPs, put them together and we looked at the various elements of them? It would be a group of people who represented both vendors and nonprofits and perhaps some of the middlemen. We'd say, "Here are the basic four or six parts of the RFP. Here are some good points in each, let's look realistically at the dates, let's put some guidelines in, like, how to write an RFP."

I don't know that anyone has done a really good job of putting it down on paper: "How do you write an RFP?"

Baker: You could standardize a lot of the RFP process to getting to the information, an RFI. If you can standardize that process you know it's always going to be the same. You do it once then you're done. That will cut out a lot of the process. What would be helpful, too, is you have the RFI, the Request for Information, and then you can help the nonprofit think through this alignment that you keep talking about Mark: What are our needs? Who are we?

This is just an example. We don't have a strong direct mail program, but we have a robust digital strategy, so do we want to go out and hire the biggest direct mail firm that has, "oh and by the way" a digital department that they started two years ago. Probably not, even though they might be the most well known out there. It's one of those things that we can help them through some questions, assess their needs, and then be able to almost personalize that last part of the RFP.

Christ: It would also give some cover to nonprofits, where people are perhaps new, perhaps a little frightened about the leadership at the board level, and might not have a lot of experience in this field. They want to do an RFP that, regardless of the outcome in terms of fundraising down the road, is going to shield them from criticism. There was a saying probably 25 years ago that nobody ever got fired for hiring IBM. In other words they might not have been the best, but if they messed up, you could say to your boss, "It's IBM. Who would have known that they would have..."

You could say, "I followed the RFP

process that the industry thinks is a good one. I didn't bring in 27 agencies because nobody thinks that's a good idea. I went looking for firms that serve organizations of our size. I did this, this, and this, and if the outcome wasn't outstanding, it wasn't the result of the process. It might well be the result of your sharing. You're partnering with that agency, but the fault isn't in the process."

I think the process is too defensive. I think that we have far less collusion in this industry than others. We spend too much time protecting against it and in the process, protecting against better fundraising.

Finney: What about the process do you think makes it defensive?

Christ: I want to sprinkle this out there. I want to get 27 agencies in. I want to go through three or four rounds of bringing these people in. I want to get spec creative from all these people. And, I won't answer individual questions by individual agencies. I won't have an individual relationship. I will shield myself behind an internal or external third party.

Finney: Yes, but do you then even want to work with an organization like that?

Christ: See, there's the rub. Mark spoke about how a person threw out a phrase like "I know it's evil but..." You know, where she's looking for that free intellectual property. At the end when she finally makes her selection, then she starts to negotiate price, and she's proud



I want to work with an agency that is almost too busy to do RFPs. --Todd Gaker

of it. I felt like saying, "Yeah then that's the beginning of a beautiful, trusting mutual beneficent relationship?"

Finney: They're able to get married.

Clolery: It works for the Kardashians.

Christ: That's not who we want to be like in our business. I think that's something that we ought to hold ourselves up to and say, "We can do better than that."

Baker: I like your point. I have found that the process that goes on between the agency and the respective client has a direct correlation to what it's going to be like to work with that agency. So if the agency needs to have an extension because they can't get it done, now on the other side I want to say "Balance this out." I want to work with an agency that is almost too busy to do RFPs. An agency that is constantly doing RFPs, and they have time to do that, means they don't have enough clients. That is a warning sign if I'm on the nonprofit side.

Clolery: Look at how many small organizations, small vendors, partners, there are out there. Many of the smaller companies were spawned from large agencies. They have to start somewhere to develop an expertise. The fact that they're a small agency doesn't necessarily mean...

Baker: No. I didn't mean they're a small agency. I just meant that if they're responding to every single RFP on the market, they either have a whole separate department which a lot of the big agencies do or they don't have enough clients.

Clolery: Which brings me back to what I asked before. It's already a cost if they've got a department that handles RFPs, then they go ahead and whine about the cost of doing it?

Baker: Yeah, you can't have it both ways I understand. It's the nature of our business.

Rhode: There is a responsibility of the agency to do due diligence and do its homework to make smart decisions about how to leverage its investment. Every agency invests in business development. The agency should never whine because ultimately whatever they do is their choice and it's their responsibility to manage themselves well.

Christ: If you've got your fair share, or even a little better than your fair share, you still got a lot invested in the RFP and the business that you want. Now where does all fundraising agency money come from?

Clolery: Donors.

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Christ: It comes from donors. That's right. We owe the donors something better than spending such a big chunk of their money figuring out how we're going to work together. It's a process they don't understand. They don't want to understand it.

Finney: They shouldn't have to understand it.

Christ: They shouldn't have to get involved in that process. I think they'd be appalled if they found out that millions and millions of dollars of their gifts are being spent in this process. I think for them we need to do better.

Clolery: We're coming to a close. Is there something that we haven't touched on that you have a burning need to say?

Rhode: I'm not sure we've touched enough on the needs of the nonprofit client. I'm not sure I have a cohesive idea about what I want to say next but let me just try. As a nonprofit client for years, I wanted my staff to be exposed to really great potential agency partners who thought big so that it would broaden the vision of my staff and myself. But I didn't want it to take a lot of time. I didn't want to see a lot of finalist agencies

There's a trust issue when you bring a

finalist in and there's only so many finalists you can feel like you're getting to know and then you've got to say no to one or two or three of them which is sometimes hard.

We limited ourselves to two or three finalists. Those were the only people we would ask to bring in the extra guns -- the creative, the strategy. Prior to that we would really make our decisions based on their capabilities and their historical work. We would look at their case histories, at their creative, what they felt comfortable showing us. We would make a decision on alignment based on that and then we would bring two or three finalists in and then ask them to go deeper. That was a better use of my staff's time, a better use of my time. And, we still met the criteria of having evaluated multiple possible partners.

We also had a procurement department that had to take the lead and I did not like that as the client. I made sure my team and I were on the phone and on email with the prospective partners. We wanted to get a feel of what the chemistry would be like. You don't always get that in a written document.

Finney: I like your word "alignment." I like the fact that we've got to find alignment. We've got to have an understanding of what the agency team would look like, relative to what the staff team looks like. You're looking at where the gaps in skill sets might be and where there are

stronger or less weaker areas of those teams.

But also, you have to work together every single day, right? You don't always have to like everybody that you work with but it's nice if you can get along and work in nice harmony together. You don't get that just by the written proposal so there has to be some communication, some semblance of what this relationship might look like moving forward.

Baker: That's a key element that I look at. If someone was open to seeing me and wanting to get to know our team, that is a worthwhile venture. What you guys just described, is an ideal situation, you know.

Rhode: Let me share two ideas that might be off the charts, a little radical. If you could get down to two finalists, have the nonprofit, give both of them a paid assignment that would be short, time framed, project orientated, a month or two that would allow the client to say, "What does it feel like to work with this group?"

The other idea that is sort of radical is something I did when I was on the consulting side. I was managing RFPs for for-profit clients. I had a client that had a \$100 million media account up for grabs. I walked them through the RFP process, for a general ad agency. When we got to the finalists, I asked the client to pay the four finalists for their work. It wasn't very

much and it was a long time ago. It was \$15,000 a piece and it mostly covered hard costs. It basically covered the airfare, the hotel, the travel incidentals.

It was more a matter of respect for the relationship. We were saying, "Look we realize you're putting maybe \$100,000 worth of time into this, here's a \$15,000 stipend to pay for your airfare and to thank you for being willing to do that." It made for an environment where the finalists really felt respected. I think the client got better thinking because it was so novel.

I'm not sure that would work in the nonprofit space. It might not because you're dealing with donor dollars, but that's why it's radical. If we could approximate some form of respect going both ways, that would be important.

Christ: You could do that if you said "If you, agency 'A' create a new acquisition package for us to test against, we'll hire you to do it, and we'll hire you to do the full spectrum of services that you provide. We're going to fulfill our work together. And you agency 'B' maybe we can't budge you for a second acquisition, would you do something for our lapsed donors?"

You could create projects like that, that would be beneficial to the nonprofit. I was thinking of the word "respect" before it even came out of your mouth. I think that's the single biggest element. **NPT**

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