# **RFP Template:** Capital Campaign Fundraising Consulting Services

*A starting point for nonprofits and libraries preparing to hire fundraising counsel*

BRAND RAISE

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*Hiring a fundraising consultant is one of the most important decisions your organization will make before launching a campaign. The right partner brings structure, honest counsel, and the experience to help you avoid the most common mistakes we see, moving forward before the groundwork is in place.*

*This template is meant to give you a starting point, not a finished document. Adapt it to fit your organization, your project, and your community. The goal is simply to help you ask the right questions so the proposals you receive actually help you make a good decision.*

**Cover Information**
Organization name, address, and contact info. Issue date and proposal due date. Keep the window realistic. Four to six weeks is common, but give more time if your Board needs to weigh in on a first draft before it goes out.

**1. Background**
What is your organization, what's the project driving this campaign, and why now. Include the size and scope of the project (dollar estimate if you have one), any relevant history (a recent capital project, a planning study, a building assessment), and any external pressures like grant deadlines or facility needs. This section tells a consultant whether they're a fit before they read another word, so be specific about what's unique to your situation (rural setting, historic building, first-ever campaign, etc).

**2. Project Overview & Objectives**
What is the campaign raising money for. Break it into concrete components (construction, renovation, programming, endowment). Then describe what you want the consultant to help you figure out: readiness, goal-setting, case development, donor strategy, timeline. This is where you separate "we know what we're building" from "we need help deciding what to build."

**3. Scope of Services/Budget**
List out the types of support you might need, organized into categories, and let respondents tell you which pieces they'd include:

- Campaign Readiness Study - testing donor appetite, reviewing organizational readiness, interviewing stakeholders, delivering a written report with a realistic goal
- Campaign Planning - goal-setting, gift range chart, timeline, case for support, campaign structure (Board, committees, volunteers)
- Campaign Coordination - ongoing counsel through the campaign, major gift strategy, volunteer and Board coaching, tracking and reporting
- Optional/Additional Services - donor communications, campaign materials, staff or Board training

Not every organization needs all of these at once. Including them separately helps a consultant propose the right scope instead of guessing.

**4. Timeline Expectations**
State when you want to start and any hard deadlines driving that (a grant window, a fiscal year, a building timeline). Ask respondents to propose their own recommended timeline. Consultants will tell you if your timeline is unrealistic.

**5. Proposal Requirements**
Ask each respondent to include:

- Firm Overview - background, years in operation, relevant experience (especially with organizations like yours)
- Proposed Approach - recommended scope, their reasoning for it, key deliverables
- Project Team - who’s actually doing the work, their role and level of involvement
- Cost Proposal - pricing structure (flat fee, phased, or hourly), a breakdown by phase, and any expenses billed separately
- References - at least three, ideally from organizations of similar size or mission

**6. Evaluation Criteria**
Include what matters to your decision so proposals come back speaking to it. Common criteria:

- Demonstrated experience with organizations or projects like yours
- Understanding of your community’s donor landscape
- Clarity and realism of the proposed approach and timeline
- Cost transparency
- Ability to start on your timeline

**7. Submission Instructions**
Contact name, title, email, format expected (PDF is standard), and the deadline restated clearly. Note whether you’ll take questions in advance and how.

**8. Reservation of Rights**
A short statement that you reserve the right to accept or reject any proposal, request more information or interviews, and negotiate scope or fees before final selection. This protects you and sets honest expectations up front.

*Once your RFP is ready, we recommend sharing it with a handful of firms whose experience matches your project, not just a long list. A focused search, three to five strong candidates, usually produces better proposals than a wide one.*

*As responses come in, look past the price on the page. Pay attention to how well each firm understands organizations like yours, how clearly they explain their approach, and whether their timeline feels realistic rather than rushed. The firm you choose will be a close partner for months, sometimes years, so fit matters as much as experience.*

*If you'd like to talk through what scope makes sense for your project or questions you have, we're glad to help. Reach out anytime to Brianna at brianna@brandraise.co.*