

## TIP SHEET

# Writing a School Software RFP? Here Are 5 Tips to Get Started.

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One of the most challenging projects a private school can undertake is evaluating, selecting, and implementing new software. Some schools have robust IT departments to lead that charge, while others have a small group of committed staff tasked with change management. Either way, it is critical to have a process to vet vendors and products. For some, that means starting with research and word-of-mouth from peers. For others, it may mean a more formal Request for Proposal (RFP) process. Whichever method you choose, these are some tips to get started:

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1

**Include input from all your stakeholders.**

Depending on the type of software, you may want input from students, teachers, the business office, development staff, or even parents. Consider creating a committee with representatives from all stakeholder groups to gather your “must-haves” vs. your “would-like-to-haves.” Before you give a list of wants and needs to potential vendors, ensure you understand the scope of change you will be managing and who will be affected.

2

**Clearly define your requirements.**

Specify the functional and business requirements of your software, including features, integrations, scalability, and compatibility with your current technical architecture. Look for software designed specifically for K-12 private school workflows. Software not designed to address your unique challenges may create more issues than it solves. Check out this [K-12 School Software Buyer's Guide](#) for some guidance.

3

**Outline criteria for vendor selection.**

Formulate a set of evaluation criteria tailored to your specific project and objectives and prioritize those criteria according to your goals. Include what is most important to you in a vendor partner. Is it proven outcomes working with schools? Is it the kind of training and support they will provide? What about data security and compliance? Consider using Blackbaud's [K-12 School Software Vendor Scorecard](#) or create your own.

4

### Set a realistic budget and timeline.

Provide a realistic budget and timeline based on the size, complexity, and type of project. Consider both the initial expense and ongoing maintenance and support costs. Then consider what time and resources your internal team can commit and how adept they are at change management. Best practice is to plan for a summer rollout so everyone, including students and their families, has time to learn the new tools before the new school year.

5

### Establish expectations for communication and collaboration.

Clearly outline your communication and collaboration expectations with potential vendors, including the frequency and channels of communication during and after implementation, the training your team needs, and technical support requirements. Do you want in-person training and videos on demand? 24/7 support? Do they offer ongoing collaboration to help you use the tools to reach your specific objectives? How important is a community of user peers with whom you can share ideas?

Document your needs and expectations for communication, so you know you are choosing a vendor that can accommodate them now and in the future. You are establishing a partnership, and collaboration is key to success.

At Blackbaud, we have more than 40 years of expertise and innovation in private K–12 schools and have guided thousands through the software selection process.

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#### About Blackbaud

Blackbaud (NASDAQ: BLKB) unleashes the potential of the people and organizations who change the world. As the leading software provider exclusively dedicated to powering social impact, Blackbaud expands what is possible across the nonprofit and education sectors, at companies committed to social responsibility, and for individual change makers. Built specifically for education management, fundraising, nonprofit financial management, digital giving, grantmaking, and corporate social responsibility, Blackbaud's essential software accelerates impact through unmatched expertise and powerful data intelligence. Millions of people across more than 100 countries connect, give, learn, and engage through Blackbaud platforms. Learn more at [www.blackbaud.com](http://www.blackbaud.com).

