

## MID-FEBRUARY 2008

### Seeking Help from Fundraising Consultants



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A service of the Corporation for National and Community Service - Resource and Fund Development Initiative

## Dear "Seeking Help" Colleague,

Whether you work within a large organization or a small project, there will come a time when you may want outside fundraising expertise to help you with a capital campaign, launch an annual giving appeal, provide a fresh planning perspective, convince leadership of a certain course of action, etc. To ensure you get what you pay for, the person you work with ideally should have had a minimum of 5 – 7 years professionally raising funds within a social-profit organization. In addition to this experience advice, we wanted to provide you with some rudimentary information related to the following ...

### What Can a Fundraising Consultant Do for You

### Locating Fundraising Consultants

### Hiring the Right Consultant

Do you have questions about using a consultant to help you raise funds? Contact us through [LEADline@CampaignConsultation.com](mailto:LEADline@CampaignConsultation.com) for more information. You can still access previous issues of On-the-Go eTA by clicking on the title at the right.

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## What Can a Fundraising Consultant Do for You?

If you do decide to hire a consultant, you should be prepared to work very hard. Consultants don't do the work for you. They guide and direct you to do the work so that you will be able to grow and be successful after they leave. Here are some ways a consultant can help you:

- Provide a Development Audit to let you know where your staff and systems strengths and weaknesses lie.
- Draft a Fundraising Action Plan to set budgeted

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goals and keep your fundraising making actual objectives.

- Work with you, your staff and volunteers to draft language for a Case for Support, solicitation letters, foundation grants, etc.
- Advise and assist on site when you and volunteers are beginning a new fundraising project such as an annual fund campaign, planned giving effort, a fundraising special event, etc.
- Help refine your board and other volunteer fundraisers' involvement in fundraising and create strategies for recruiting and training new membership.
- Work with you to understand and if feasible, create a Marketing Plan so that your initiative gets noticed in a positive way that would attract donors.
- Plan and manage a Capital Campaign.
- Conduct a Feasibility Study to determine the communities' readiness to support such a campaign at the amount you need.
- Help you identify major gift prospects and then guide you through the steps necessary to cultivate a prospective donor toward making that gift.
- Provide research resources to help you gain information about the donor prospects you have identified.
- Other

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## Locating Fundraising Consultants

When you are ready to hire a consultant, seek out fundraising expertise from such sources as ...

- Colleagues at similar organizations in your community or beyond
- Your state nonprofit association
- Association of Fundraising Professionals ([www.afp.org](http://www.afp.org))
- Association of Philanthropic Counsel (<http://www.apcinc.org/>)
- Chronicle of Philanthropy (<http://philanthropy.com/>)
- The NonProfit Times (<http://www.nptimes.com/>)

### Share Square

When interviewing fundraising consultants, have fundraising

- Grassroots Fundraising Journal (<http://www.grassrootsfundraising.org/>)
- Your local Yellow Pages
- Other

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## Hiring the Right Consultant

Since there is no “one-size-fits all”, it’s important to find the fundraising consultant who is right for your organization or program.

Keep in mind, that the consultant is there to keep you on task and to grow your group’s capacity in fundraising. They are not the “hired solicitor” who will share their contacts and make the solicitations. You, staff and fundraising volunteers can expect to continue researching prospects, cultivating, preparing for solicitation and making the actual “ask”. The fundraising consultant will help you and your fundraising volunteers work more successfully to reach higher goals.

The right consultant is someone who adheres to the “Donor Bill of Rights” attested to by the more than 50,000 members of the Association of Fundraising Professionals. Within the document is the disallowance of consultant fees accepted based on a percentage of funds raised. Reasoning is that the organization limits its ability to meet mission needs by not having an annual budget line item dedicated to the cost of raising resources from diversified sources. In addition, the risk to donors and your mission is too great by someone doing or saying just about anything to increase their income if based upon how much they raise.

Keep your consultant and tasks perking along by signing a clearly written Memorandum of Understanding that describes the scope of work, amount of time allocated, cost, etc. before beginning the work. While contracts can be terminated under the proper legal conditions, it is costly in terms of time and your fundraising initiative when a relationship is not successful. [Click here](#) for more details on hiring the right consultant for you program.

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### Let us know

Have you used a consultant to help you raise funds for your program?

Contact us at [LEADline@CampaignConsultation.com](mailto:LEADline@CampaignConsultation.com) (LEADline is sponsored by the Corporation for National and Community Service through its Resource & Fund Development Initiative.) We would be happy to answer

volunteers participate in the interviews. Since they, too, will be working with the consultant, it is important that their questions get answered.

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*A good consultant will help people see new opportunities ...*

*“The real voyage of discovery consists not in seeking new landscapes but in having new eyes.”*

Sam Walton,  
Founder of Wal-Mart, Inc.

questions or to give you more support.

Thank you for your interest in On-The-Go eTA, We encourage you to **send this and other issues of OTG eTA to friends and colleagues** who would benefit from the information. Also, if you're on information-overload, you may request **email removal**. Otherwise OTG e-TA will be back soon with another edition.

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Details from above:

## Hiring the Right Consultant (cont.)

Seek referrals	<p>Ask other organizations in your area for names of consultants they have hired or considered.</p> <p>Your local Association of Fundraising Professionals will have members who are fundraising consultants, and if there is a statewide nonprofit association, they, too, may have a list of consultants.</p>
Find Mission Match	<p>You will want to look first at consultants who have experience with organizations similar to yours in size and mission. If you are a faith-based social service organization, you will want someone who has worked in the faith community.</p>
Get References	<p>Ask for at least 3 references from clients of the consultant. If their client list is posted on their website, seek information here also.</p> <p>Ask to speak to one client whose goals were not achieved. This is standard operating procedure and a consultant should not be upset by this request.</p>
Conduct Interviews	<p>Recruit volunteers to help you spend a least an hour interviewing each prospective consultant.</p> <p>Be certain that you interview the person who actually will be working on your account.</p> <p>Ask why they feel they would be a good match for your organization.</p> <p>Ask to see samples of their work.</p> <p>The consultant should be asking you a lot of questions at this time also.</p> <p>Chemistry is important when working with a consultant, as they will be spending time with your staff, board, and volunteer fundraisers.</p>
Sign a Memorandum of Understanding	<p>The MOU or agreement should include a description of the activities, deliverables, and timeline.</p> <p>Professional fees, direct expenses, payment schedule and provision for termination should be outlined.</p>

Be certain to review this document carefully. You may want to have a lawyer review it also.

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## Resources

*The National ASK (Awareness, Skills, Knowledge) to Sustain Institute*, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 1998, 2002

*The CNCS Resources Now! National Institute*, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 2005-07

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## Learning Products and Services

### **LEADline:**

*(Learning Experiences At a Distance)* LEADline is designed to give information fast. Have a resource & fund development question? Use LEADline and within 24 hours you will receive response and advice from a fundraising professional.

### **Contact us**

[LEADline@CampaignConsultation.com](mailto:LEADline@CampaignConsultation.com)

### **GIZMOs:**

*(Giving Information for Zooming Money Objectives)* GIZMOS are resource and fund development tools for you and your volunteers. They are tangible products in packets, pocket brochures, CD-ROMs, games, etc. They feature a myriad of fundraising topics such as *The Case for Support*, an interactive online resource. To order, contact us through [LEADline@CampaignConsultation.com](mailto:LEADline@CampaignConsultation.com) or call 410.243.7979 or toll free at 1.877.243.2253

View and use our newest GIZMO, *Building Your Case for Support*, at [www.CampaignConsultation.com/gizmos/case](http://www.CampaignConsultation.com/gizmos/case)

### **The Chronicle of Philanthropy:**

: Everyone who comes to a Resources Now! National Institute gets a free subscription to the *Chronicle* for a year. Participants in CNCS Campaign Consultation workshops receive the latest issue free of charge plus a \$20 discount on one year's subscription.

### **Workshops/Clinics:**

The Corporation for National and Community Service (CNCS), through its T/TA service provider Campaign Consultation, Inc., offers a three-hour workshops and clinics for those interested.

### **Online Courses/Webinars:**

Web course delivery of topics pertinent to resource development such as — **Build Fundraising Volunteer Champions** and **Cause Related Marketing and Corporate Partnerships**. Available through the Resource Center at <http://nationalserviceresources.org>

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- [January 2008 Fundraising in Diverse Communities](#)

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