

9 Ways to Size Up Potential Fundraising Counsel

How do you go about choosing a consultant to help you with your fundraising program? Here are nine proven ways to decide which consultant is right for you:

1. Credentials

What special qualifications does the consultant have? Check for certifications like the Certified Fund Raising Executive (CFRE) or the Advanced Certified Fund Raising Executive (ACFRE). Has the consultant been a speaker on development topics? Is he or she seen as an expert in certain areas of development?

2. Experience

What is the consultant's track record, both in consulting and in non-consulting roles? What kinds of organizations has the consultant served, with what success, and how might this be a predictor of success with your organization?

3. Skills

What special skills does the consultant offer that you do not currently have in-house? Is he or she a planned giving specialist, or a Board development specialist? Are his or her special skills what your organization needs?

4. The fundraising Counsel team

There are large consulting firms, medium-sized consulting firms, and solo consulting firms. Each has an upside and a downside. If you need resident counsel with the ability to access special expertise beyond the on-site consultant, then you will gravitate to a larger firm. If you need periodic or project-based help, you may lean toward a solo consulting firm. Find out who in each firm is available to help you.

5. Chemistry

Skills and expertise are wonderful, but they may not matter if there is no chemistry between client and consultant. Chemistry is the intangible that makes it possible for people to work together productively. It's more than liking or not liking an individual. It involves the approach to work, interpersonal skills, the work ethic, follow-through, collegiality, even manners and other factors.

6. Local or out-of-town

Is it important that the consultant be local? That tends to keep fees and expenses lower. Is your organization willing and able to bring counsel in from out-of-town or out-of-state? Will it ultimately matter to those the consultant will work with and influence?

7. Price

While there are no price controls in consulting, there are reasonable ranges of fees for the scope of services provided and the abilities of the consultant or consulting firm selected. A little shopping around will confirm this. It's not unusual to have sticker-shock when scoping out long-term consulting arrangements. While total dollars are important in determining which consultant to use, the more important question is *value*. Will counsel help you achieve your goals? If so, their value is great.

8. Inviting proposals

It's standard practice to invite three to seven Requests for Proposals from consulting firms. Be as specific as possible when making the request so the consultant can give you the best proposal. Ultimately, it will boil down to interviewing the consultant, sometimes in a group setting (such as a fundraising committee or Board) and asking specific questions.

9. Negotiating the working relationship

All relationships have an ebb and flow. Sometimes counsel needs to be on-site for meetings and work, while at other times, the consultant can work away from your office. Feel free to negotiate the terms that are most beneficial to you while still workable for Counsel. This may be an ongoing process, and that's normal.

Getting the right consultant at the right time takes work and careful evaluation. But it will be worth it when the relationship leads to increased productivity in fundraising.

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