

Above Goal Co-Founder, Ken Jones

CHOOSING A CAMPAIGN CONSULTANT



*A Guide For **Nonprofits** And Places Of Worship*

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Places of Worship*

By

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Ken Jones

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CHAPTER 1:

Different Approaches to Campaign Consultancy

I am going to go out on a limb and say that no-one has talked to as many fundraising consultants (henceforth called campaign consultants) as I have lately. I guess it's hardly surprising. Above Goal is unique in that one of the products that we offer is for consultants who offer campaign services. I spend my days living and breathing campaign consultants, reading their websites, blogs and tweets, attending webinars and so on and so forth. Here at Above Goal, it is our business to know their business... and since we've launched I've learned something.

“All campaign consultants aren't created equal.”

This may seem intuitive, but what I'm talking about isn't as immediately obvious as you might think. I want to move beyond the basic idea of big firm versus boutique firm, local or regional reach versus national (or international reach), prices, or even core values. Specifically, I am talking about the different approaches which campaign consultants can choose to take.

What Do I Mean by Approach?

When you ask a consultant about their approach they will tell you that it “depends on your needs”. This is true. Campaign consultants should be nimble enough to adjust to individual projects at a variety of fundraising shops and varying skill levels.

Most campaign consultants will provide:

- Creation of a campaign plan with a corresponding timetable.
- Development of cultivation and solicitation strategies for key donors in the pipeline.
- Advice on case for support.
- Gift solicitation training to your staff and campaign committee.

At the end of the day...

This is great. Though, at the core, and at the end of the day, a campaign is just a project – an important one for sure - but a project nonetheless. Like all projects, there are tasks, assignments, and deadlines. Here are some typical examples:

- The board chair, Tiffany, is supposed to call our lead donor, Gregory.
- A campaign volunteer, Lindsay, asked John for a campaign gift two weeks ago
- Louise wants you to schedule a meeting with her in May when she gets back from her Winter vacation in Florida.
- Pastor Tom is supposed to connect you to a potential campaign prospect, Terry, that attended services years ago, cares about the project, but has since moved away.

Scheduling face-to-face meetings, making phone calls, preparing materials, reading prospect biographies, politely nudging campaign volunteers – these are all a part of the day-to-day life of a campaign.

Campaigns can die in a puddle of little tasks that have fallen through the cracks if one underestimates their importance.

How will your consultant engage with these tasks?

At Above Goal, when we talk about varying approaches, we are talking about the way in which campaign consultants approach tasks such as these. It is the biggest difference that we see between campaign consultants.

To better understand these tasks, we generally categorize firms based on two different approaches to task management.

Approach A – Done for or with you: Many consultants will take on a project management role in addition to the advisory role on campaigns. Often, these consultants will need to track key campaign statistics and interact directly with volunteers. They will also manage campaign related tasks and analyze the next steps on behalf of the client.

Approach B – Advisory only: Other consultants will serve in a traditional advisory role. Once a campaign is underway they receive campaign progress reports from their clients.

To understand the difference between these 2 approaches, consider the following tasks and how the approach of campaign consultants from each category will vary.

	Approach A	Approach B
The board chair, Tiffany, is supposed to call our lead donor, Gregory.	<i>I called Tiffany. She is going to follow-up with Gregory next week.</i>	<i>Last time we talked, you said Tiffany was going to call Gregory. Did she do it?</i>
A campaign volunteer, Lindsay, asked John for a campaign gift two weeks ago	<i>I got an email from Tiffany yesterday. She secured a \$100,000 gift.</i>	<i>Has anyone followed up with Lindsay to see if John made a decision?</i>

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<p>Louise wants you to schedule a meeting with her in May when she gets back from her Winter vacation in Florida.</p>	<p><i>I've added Louise to your call list for next week. She's back from her vacation.</i></p>	<p><i>We need to get in touch with Louise. She's back from her vacation.</i></p>
<p>Pastor Tom is supposed to connect you to a potential campaign prospect, Terry, that attended services years ago, cares about the project, but has since moved away.</p>	<p><i>I spoke to Tom yesterday. He has a meeting with Terry on the 14th.</i></p>	<p><i>Has anyone followed up with Tom?</i></p>

Is the above chart generalized? In some ways, yes.

Can it be straightforwardly applied to the campaign services offered by *every single* consulting firm? Of course not.

Let's be absolutely clear:

No one approach is necessarily the right approach.

Ideally, you want to choose a consultant based on your unique needs, internal bandwidth, and how you and your board want to be served.

However, whenever you choose a consultant it is important to bear in mind that someone must fill the project management role. If this isn't your consultant it needs to be you, another staff member or a professional volunteer. It is important that you consider the role of

your organization and how you will collaborate with your consultant. Think about your needs and the capabilities of your fundraising shop in relation to the consultant you choose.

Even if you choose a consultant along the lines of Approach B (which is fine – as I said, each approach can have its advantages), **they still need to advise, shape and take an interest in** how you will apply the project management component of your campaign.

More specifically, your consultant should be concerned with your technology and how you will use it to manage the project management element of your campaign.

Your consultant should provide more than a just a template describing how to report follow-up tasks and campaign tasks to them. They should provide guidance on how you should track these tasks in the first place, in order to then report on them.

In the study phase, some consultants might provide recommendations on “system readiness”. It is important that these recommendations are thoroughly understood, to ensure that they are directly applicable to your organization and apply to the campaign management itself - not just the management of pledges and donations.

Most traditional fundraising software is equipped to handle pledge payments and redemptions. However, not all software is equipped to handle the unique requirements of a campaign. You need to keep track of volunteer assignments, volunteer tasks, your own tasks, the status of your prospects, and relevant campaign statistics – to name but a few things. It is important that your consultant can provide specific guidance on how to handle this. Furthermore, they should also assess whether your staffing structure, as it stands, is set up for a successful campaign.

Now it may be that your consultant is providing a project management system of their own to use, that they are intimately involved in preparing your system for success. Or they may recommend a third-party

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system. Whatever the case, it is of vital importance that you understand their approach to project management and ensure it is aligned with your project needs.

CHAPTER 2:

Finding the Right Consultant

In the first chapter I spoke about the importance of remembering that, at its core, a campaign is a project and should be managed as such.

I now want to lend our expertise on the process of finding a consultant.

There are a few things that must be considered before you hire a consultant. At an absolute minimum, you should have an idea of what you plan to raise money for and roughly how much this will cost. You need to know who your key donors would be. Your board members should be supportive of your project. You should take campaign readiness very seriously.

Once you have reached this minimum level of preparation, you will be ready to find a consultant.

There are normally two scopes of work (often with two different contracts) that will be completed. The first of these is a campaign planning study, where your top donors are engaged and the feasibility of your campaign is tested. The second is an ongoing advisory contract (and sometimes project management contract depending on the consultant that you choose).

Your campaign is high stakes and it is imperative that you find a consultant who is suited to your specific needs. It is also worth bearing in mind that campaigns are high stakes for consultants too. Consultants are only as good as their last campaign. Consultants are risk averse

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and generally want to avoid public campaign embarrassments that might ruin their careers and practices.

Here are some initial tips for finding the right campaign consultant:

- Get recommendations from colleagues at other organizations or places of worship that have recently completed campaigns.
- Your local community foundation, nonprofit center or AFP chapter will usually have a list of consultants on file – make some inquiries.
- If you are part of a federated organization or a parish within a diocese, check with the national or regional development offices.
- If you attend national or regional conferences, visit some of the booths.

Once you've identified your semi-finalists, there is no need to issue a RFP - most consultants won't respond to them.

Instead, set up a phone appointment. Tell them about your organization, your goals and what you hope to achieve. Then let them start talking. Let them do some digging. They will be keen to ask you some questions, and you should start to get a feel of what it would be like to engage with them.

If they meet your expectations, ask them to join the finalist group to visit you and your selection committee in person to present a full proposal.

CHAPTER 3:

Questions for Your Potential Consultant

As stated in the first chapter, your consultant should be flexible and nimble enough to help you with a variety of different campaign tasks. You first need to decide for yourself what type of consultant you want to work with. Listed below are a few tasks which are likely to crop up on a campaign. Who do you envision completing these tasks? Considering this will help you decide which approach will be more suitable to the consultant you want to hire.

If you aren't planning on hiring a consultant take a close look at these tasks. Are you prepared to manage these tasks internally?

Planning and Major Gifts Phase Campaign Tasks

- ✓ Preparing campaign plan and timeline
- ✓ Writing the case for support
- ✓ Identifying key potential donors
- ✓ Campaign committee recruitment
- ✓ Prospect research
- ✓ Development of cultivation and solicitation strategies for key donors and those in the pipeline

- ✓ Development of campaign materials (e.g. brochures, solicitation materials, websites, proposals, etc.)
- ✓ Preparing materials for campaign committee meetings
- ✓ Successfully executing campaign meetings
- ✓ Planning and executing campaign events
- ✓ Meeting with donors
- ✓ Managing public phase solicitations (direct mail, phonathons, etc.)
- ✓ Managing external communications strategy (public relations, newsletters,)
- ✓ Following up with donors
- ✓ Meeting individually with campaign committee members
- ✓ Following up with campaign committee member assignments
- ✓ Writing gift acceptance policies
- ✓ Writing grant proposals (when needed)

A few further points to consider:

When it comes to making gift requests, you are likely to find that very few consultants will make these on your behalf. While some of them will attend gift request meetings with you (even just to be a comfortable presence in the room) it is often not within the scope of the consultant to make the request itself.

Furthermore, it is not the responsibility of the consultant to bring a list of campaign prospects to the table. You need to have your own list of donors to work from – recall that your key donors should be identified before a consultant is hired.

With that in mind, **here are 10 questions you should think about asking your potential campaign consultant:**

1. Can you tell me about other campaigns that you have served in our sub-sector with similar campaign goals and development staff sizes?
2. How will you work with us during the campaign? How might this change during the planning, major gifts, and public phases?
3. During the campaign, how will responsibilities be divided between us and you as the consultant?
4. How often will we see you? What will our main form of communication be and how often?
5. What do you foresee as our biggest campaign challenges? How will you help us overcome these challenges?
6. What are the behaviors of your ideal client? What are your expectations of us as your client?
7. How long do you think it will take to achieve our goal?
8. Some campaigns struggle in the post major gifts phase (public phase). How will you prepare us for the public phase of the campaign? If you're engaged as the consultant? If you're not engaged?
9. Approach A Consultant: How do you plan to engage with the project management role?
10. Approach B Consultant: How will you determine if we are ready to manage this project. How will we communicate our progress to you? How often?

Of course, this is just a general guide - you will want to ask specific questions about other topics:

- Billing
- Internal bandwidth

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- Client project expenses
- Consulting fee
- How your project will be staffed, who you will be working with
- Other matters or services unique to your campaign.

Furthermore, as you would do when hiring for any role, the little things matter – style, fit and personality of the person you might be working closely with for several months (or years!).

Don't sign a contract with an opaque idea of what your consultant will be doing and how they will contribute to your campaign. Know exactly what you're paying for and why you're paying for it.

CHAPTER 4:

Bonus Chapter on Pricing and Consultant Fees – As Of 2017!

We have discussed the differing approaches which clients take towards their work. As well as this, you are likely to find that consultants have different approaches to how they charge for their work – this chapter offers a brief insight, which can act as a basis for discussion when liaising with consultants.

Approach 1: Some campaign consultants charge on a straight time basis. For example, they will work for 40 hours and bill you for 40 hours-worth of work. This approach makes it easy to know where you stand but can lack flexibility.

Approach 2: Other consultants will prepare a proposal where they estimate that they will provide you a set number of hours of work per month. They then build a project fee based on this estimate, which could be paid monthly, quarterly, semiannually or annually depending on your agreement

In Approach 2, you may be paying a flat monthly fee. If this approach is taken, it is worth asking your consultant in advance to disclose how many hours (or days) they expect to dedicate to your specific project.

Furthermore, it is important to make sure you read your contract thoroughly so that you can determine what happens if you go over your estimates. Will you have to pay more? Avoid any unpleasant surprises.

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Approach 3: Full-time or resident consultants will likely charge a flat monthly fee per staff member that will be working in your office for the contract period. These consultants will operate within your office.

With all of these approaches, charges for travel and other project expenses will vary. Discuss this with your consultant in advance and check your contract if necessary to ensure that both parties are clear about how these charges will be billed.

Based on our research nonprofits can expect to pay anywhere from \$3,000 to \$40,000 per month for campaign services. Of course the reason this range varies so much is that the needs and approaches of consultants also vary.

As with all consultancy, it is vital that you know exactly what you're getting for your money, and the key to this is communication. When choosing a consultant it is a good idea to figure out the pricing approach of all of your candidates, so you can make apples-to-apples comparisons across your finalists. This will ensure that you are getting a consultant who is well-suited not only to the needs of your campaign, but also to the budget.

Avoid consultants that base their fees off of the percentage of total funds raised. It's against the Association of Fundraising Professionals ethical standards.

Conclusion

To summarize, we have found that there are two main approaches to campaign consultancy.

Approach A involves the consultant taking on more of a project management role. On the other hand, Approach B internalizes the project management role to you or a member of your campaign, restricting the consultant to traditional advisory role.

As explained, there is no intrinsic benefit to either of these approaches – instead, the first step to finding the right consultant is to consider which of these offers a better fit for your campaign. Use the chart in chapter one to understand the difference – which role do you envision a consultant taking?

Once you have decided, it is time to go about finding the right consultant for your specific needs. Chapter two outlines the minimum preparation that you should make before approaching a campaign consultant, as well as offering advice on how to source someone who will be suitable for your project.

Once you have some candidates, it is important to discuss which parts of the project they will handle and how. It is important to find out as much as possible about previous campaigns that they have run and which responsibilities you want them to take. In turn, you should be as informative as possible about your own plans for the campaign, for them to understand how best they are suited to help your needs.

Finally, understanding the different ways in which consultants charge for their services is important when comparing candidates and recognizing what you will actually receive for the money you spend. These initial guidelines will ensure that the campaign consultant you choose is able to help you achieve the goals of your campaign thoroughly and efficiently.

Try our awesome campaign management software!

Above Goal is a project management tool for campaigns - emphasis on the words 'project management'. Typical donor management systems are often poorly equipped to handle the project management aspect of a campaign in a smooth and efficient way. You will probably find that your donor management system isn't collaborative. Your volunteers can't log-in and share insights and updates (nor would you want them to!). Your consultant (if you are using one) can't log-in either.

Because of this, complicated spreadsheets and tiresome email chains are inevitable during campaigns. Many non-profits use spreadsheets to track volunteer assignments, important campaign statistics, monitor the status of prospects in the campaign pipeline, and oversee immediate tasks.

Above Goal is not a replacement for your donor management system. It is a short term tool customized for the project itself. Our project management software allows you to keep track of activities and tasks of all the people involved, including yourselves, your consultants and even your volunteers. Above Goal makes it easier to organize key documents, data and reports, ultimately facilitating the efficiency of any project for both consultants and their clients.

Want to learn more about Above Goal?

Visit our website and watch our 90-second product demonstration to see how Above Goal can be used to run more effective campaigns.

<http://www.abovegoal.com/productoverviewvideo/>

Want more campaign advice?

Watch The 6 most Common Capital Campaign Spreadsheets Mistakes video and download the corresponding guide.

<http://www.abovegoal.com/commonspreadsheetmistakes>

Questions, comments? Just contact me at hello@abovegoal.com. I would love to hear from you.