

Hiring a Development Consultant

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Writing about consulting has many challenges for one who has been providing counsel to nonprofits since 1990. How can I be believable and helpful to those who are thinking about engaging a consultant or who are currently working with a professional advisor? Will I seem self-serving? And, how do I persuade those who have had bad experiences with a consultant that we are not all the same?

Development Philosophy

Let's begin with the last question. Each consultant and consulting firm should be based in a philosophy and understanding of development that enables counsel that builds up the nonprofit client. Nothing in development occurs individually – everything a nonprofit IS and DOES affects its ability to raise friends and funds. So, when engaging a consultant for a capital campaign, for example, consider whether the services proposed are specific to that fundraising endeavor or includes an examination and recommendations on all of the other development activities that will make an impact on the campaign and its potential for success. Consultants and nonprofits who are “Johnny One-noters” set themselves up for disappointing results.

For a capital campaign, or any other part of the development program, to achieve success, attention must be given to:

- Whether or not your mission statement is current, credible, motivating, and memorable;
- How the capital objectives were set – by a small inside group or by a broad-based planning activity that helped build ownership of the capital goals;
- How the nonprofit has been telling its story. Have its target audiences been correctly identified with sufficient understanding of what messages will be motivating to them;
- The program that enables individuals to become involved with the nonprofit in ways other than giving money;
- Whether or not the annual giving effort is successfully acquiring new donors, keeping contributors, and moving donors to higher levels of support;
- The program to raise major gifts, including estate-related, on an ongoing basis;
- The involvement and support of the Governing Board that constitutes a significant part of the foundation of the capital campaign;

- The willingness of the CEO to lead in attitude and actions to secure top volunteer leadership and participate in cultivating and soliciting major prospects;
- The development staff member(s) who will be managing the capital campaign in addition to the continual work of raising operating funds.

Your consultant will serve you best by being thorough in his/her approach of assessment, planning, and guidance in the implantation of the capital campaign.

Education

After evaluating the approach of the consultant, it is advisable to consider the methods and intent of the services that will be delivered. Our firm, for example, believes that each of our consultants should function as both advisor and educator.

Our mission statement is: *“To deepen the body of knowledge and strengthen the capacity of nonprofit leaders.”* As a corollary to our mission is our statement of our singular goal: *“To ensure that our nonprofit partner becomes stronger and better able to serve its mission, its goals, and its clients.”* Our work centers on our client so that the nonprofit and its leadership are better able to succeed when our consulting relationship is over.

For that mission to be accomplished, it is our view that each of us must possess a deep understanding of development and long experience in working with nonprofit organizations. A client should expect that the consultant serving their nonprofit can provide counsel specific to the challenges faced without having to “phone home.” There is no quick way to acquire knowledge and experience, and your nonprofit should have appropriate expectations that the person serving them is up to the task.

Having the requisite knowledge and experience are basic expectations; however, as important is the intention of the consultant to serve as a mentor to the CEO’s, development staff members, and, in many cases, members of the Board. A good measure of any consultant is whether or not your organization is building a body of knowledge and techniques that will inure to its benefit when counsel is no longer around.

Ask questions of the consultants whom you are considering engaging. How do they go about their work? What mutual expectations are there? Do they have one approach for all organizations or do they adapt their work to the individual client? How do they engage with the Board and staff?

References are also important to learn how the consultant has worked with other organizations. Ask for a list of 3-5 current and/or past clients with contact

information *and make the calls*. Along with the usual information that you will get from these contacts, make certain you talk about the style of services and if promises have been kept.

Closing Thoughts

It will come as no surprise that not all consultants are the same. Each of us has different personalities, life experiences, and methods of providing counsel. This is why selecting a consultant is much like choosing a best friend. Given equal knowledge and experience, you must pick the one whom you believe you will want to have around and whose advice you are more likely to take. Some of my best and longtime friends have been clients. There was an immediate connection that enabled successful work to be done and a friendship to form. For these and other reasons, the persons who will be working directly with the consultant should have the most input in the selection. The personal aspect of the consultant whom you choose to hire stands as an important consideration for you and the professional advisor.