



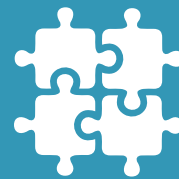
Selecting Campaign Counsel

Your guide on your side.

Relationships matter—successful fundraising depends on strong relationships between staff, volunteers, and donors. As you help individuals connect and grow with your organization, it can be helpful to have outside counsel to provide objective advice. Counsel's role is to walk alongside you, serving as a guide and partner for fundraising success.

Steps to find the right consulting partner:

- **Identify key players.** When choosing counsel, contact organizations such as the Association of Fundraising Professionals (AFP), Giving Institute, or use referrals from your peers to identify potential consulting firms. Do some research on each firm to identify specific topics to explore further.
- **Seek the right answers.** Next, prepare a Request for Proposal (RFP) that clearly outlines the work to be done. Be sure to allow conversation and interaction with potential firms in addition to distributing an RFP. This will help you get a sense of how counsel will really work with you.
- **Narrow the playing field.** After reviewing the responses to your RFP, ask these questions to see which firms are best suited for your needs and whose approach will advance your goals.
 - Does the firm have experience with organizations like yours?
 - What is the firm's experience in running campaigns with a similar scope and goal?
 - Who from the firm will work on your campaign? Assess your confidence in that individual. Does he or she appropriately represent your organization's constituents?
 - Is there a good fit? Analyze how you will communicate with the firm and gauge how your personalities mesh and the level of mutual respect.



Be sure to establish expectations before making a final commitment.

Your expectations

Counsel will need to understand the history, mission, and operating culture of your organization from the start. They should be students of your organization and be able to understand your unique set of circumstances. Finally, counsel should always be authentic and objective in its analysis and advice for the future.

Counsel's expectations

Have a clear understanding of why you are raising money, including a mission-based purpose, clearly definable components, and cost estimates. You should also understand the time commitment of your staff and volunteers, as well as the financial investment required to support the initiative. Also, make clear how decisions are made in your organization to avoid any confusion with leadership during the engagement.

DISCOVER FOR YOURSELF.

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