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Ways to Improve Your Fundraising Success by Using Consultants

January 18, 2011

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Jonathan Abramson, Partner, avenue2possibilities, LLP

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IN PARTNERSHIP WITH



ABOUT THE PRESENTERS

Jonathan Abramson, Partner, avenue2possibilities, LLP

Jonathan offers coaching services to nonprofit organization leadership and staff motivated by his desire to see this significant sector excel in providing for the needs of our communities. He is also co-creator, with Randa Cleaves, of Inspired Giving NOW!™ and Inspired Giving NOW! Interdisciplinary Technical Assistance Training™. Over 270 participants representing 132 organizations have completed the training in the United States and Singapore.

Judy Anderson, President, Power Productions

Judy offers fundraising event and auction management training and consulting. She has served as director of several of the largest fundraisers in the state including the Classic Wines Auction raising over \$1 million annually, the Sagebrush Classic in Bend, and Portland State University's Simon Benson Awards Dinner. Judy holds a Certificate in Festival & Event Management from the University of Oregon and is the author of two books, Event Management Simplified and Auction Management Simplified.

Sara T. Behrman, Freelance Writer and Consultant

Sara has worked with all types of nonprofit organizations and government entities throughout the United States. She offers her multimillion-dollar grant writing expertise on a contractual basis, tapping more than thirty years of experience as a former librarian, creative writing instructor, and published nonfiction writer. To date, Sara has raised more than \$70 million in grants for her clients.

Helen Kennedy, CFRE, Partner, Lewis Kennedy Associates

Helen has over 25 years of fundraising experience. She excels at using strategic analysis and business insight to develop integrated campaigns for individual giving. She has an MBA from UCLA and is a frequent speaker at national and regional fundraising conferences.

Holly Paige, Principal, Wave One Group

Holly helps nonprofit organizations bring their purpose and mission to life by developing video marketing strategies and producing short films and videos for fundraising and marketing campaigns. Holly is a former broadcast news reporter and a graduate of the University of Michigan.

Brenda Ray Scott, CFRE, Principal, Adept Diva Consulting

With more than 18 years of experience, Brenda proudly works with established and emerging organizations providing grantwriting expertise, corporate and foundation relations, sponsorship management, and planning services. A sought after speaker, Brenda speaks locally and regionally on the craft of grantwriting including utilizing social media for research and other facets of fundraising.



What Were You Thinking? Questions to Ask Before Hiring a Consultant

What do you want the consultant to do, to be?

- Expertise
- Capacity
- Research
- Experience
- Feedback
- New ideas
- Consistency
- Flexibility to take advantage of new opportunities
- The Big Stick

Who will they work with in your organization?

- Board
- Staff and at what level
- Volunteers
- People using your services

Are you ready to work with a consultant?

- Do you have your goals firmly in place?
- Are you ready to change, do things differently?
- Are you ready to grow?
- Are you ready to make decisions?
- How flexible is your organization?

Can you afford to hire a consultant?

- Can you afford not to?

How long?

- One big project
- Ongoing support

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WVDO/NAO PROGRAM – January 18, 2011

Demystifying the RFP Process

Judy Anderson, President

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A Request for Proposal is a way to solicit proposals from consultants interested in being hired for a project. It provides basic information about your organization and the project or problem you would like the consultant to address. There should be an established format (like an outline) for proposal submittal so that you can compare consultants equally and in an efficient manner (apples to apples, so to speak). It's frustrating to hear that ABC firm got the job because they submitted information about something that wasn't even asked for in the proposal. Keep the playing field equal.

This information includes:

- How to develop an RFP
- What the consultant needs to know in order to respond
- How to evaluate the proposals

General Information

1. You need to be clear on what you want the consultant to do and the kind of consultant you want to hire
2. It's frustrating for a consultant to try to develop a proposal when the client is trying to figure out what they are looking for – It's very easy for a consultant to tell if you are fishing for information because you haven't identified the outcomes expected or don't know what you want them to do
3. Asking a consultant to respond without providing sufficient information may result in consultants opting to not respond because it will be clear you don't know what you want
4. In looking for an end result, if you are paying a consultant for their advice because you need it, you should be prepared to follow it, even if it's not what you wanted to hear.

Standard Elements of an RFP

1. A format that allows the consultant to respond in a 2-3 page proposal – keep it simple
2. Design the RFP so it allows flexibility in the response for the consultant to present ideas. They should not be asked for conclusions at this point, but for how they would approach what it is you want them to accomplish
3. Organizational Description - mission, programs and services provided, funding sources
4. Proposal Background – a brief statement identifying the final product and why you are soliciting proposals
5. Identify the Problem or Need – what are the factors that are compelling you to undertake this problem – identify both symptoms and causes
6. Anticipated Outcomes – what do you want to accomplish upon completion of the project?
7. Criteria for Selection – how the proposals will be evaluated and compared
8. Timeframe for Consultant Selection – deadline for submitting proposals, interviewing of candidates, final selection
9. Name and contact information for your organization's key representative who will be overseeing the consultant's work

Define What the Consultant Should Include in the Proposal (in addition to standard elements)

1. Name of consultant or firm – name, address, phone, fax, e-mail
2. Projected scope of work and timeline – activities and timeline for completion
3. Budget and cost – estimated number of hours and hourly rates for consultant (or all consultants if soliciting a team) – what the consultant will do – cost for each phase and the maximum fee. Personnel and reimbursable expenses should be identified separately in the budget.
4. Resume/s – if more than one consultant resume is submitted, identify who is doing what for the project
5. References – consultant should identify what they worked on, when and where for each reference given

Develop a Screening Process

1. Eliminate proposals from consultants who are obviously unqualified, lack understanding, don't provide required information, or who ramble and don't provide any information of substance
2. Look at the way the consultant has proposed to accomplish the work – will it work with your group dynamic?
3. Proposal should adequately address your needs – is there a plan of action and timeline, have references been provided
4. Cost and budget – this is important but can be negotiable – stating your budget parameters in the RFP will help consultants provide cost estimates and a scope of work that will match your budget without a lot of alterations
5. Personal interviews – may want to allow the consultant to rewrite sections of the proposal if you think they are a good match, but you need clarification of certain aspects

During the Interview

1. Outline the problem and ask how the consultant would proceed
2. Ask what they expect of you and to describe what you can expect of them
3. Observe their personality, chemistry, working style, how they listen, the questions they ask, how they analyze situations, solutions they present and how realistic they are
4. Make your selection on who you feel is the best fit with the organization
5. Following the consultant selection - sign a contract or letter of agreement that includes but is not limited to the scope of work, a timeline, outcomes expected, fees and payment schedule, where consultant will work, begin and end dates for the project, cancellation terms, confidentiality agreement statement if proprietary information will be used

Informational Interviews with Consultants

You don't always have to do an RFP. You can make a decision by interviewing a few consultants who have been referred as long as you are clear what you want the consultant to do. With or without a request for proposal, most consultants are willing to give you a window of time free of charge to establish what you are looking for, let you know their qualifications, and give a quick view of how they can help. You should expect this courtesy one time only. Please do not call continually for free advice while you try to develop an RFP, especially if the consultant you are asking for advice may not be hired.

Some excerpts have been used from *Succeeding with Consultants* by Barbara Kibbe and Fred Setterberg, copyright 1992 by the David and Lucile Packard Foundation



avenue2possibilities LLC

Why does your organization do what it does?

What does that make possible?

Why is that important?

“ ... transform your ideas to beat the **Curse of Knowledge**.”

“Had John F. Kennedy been a CEO, he would have said, “Our mission is to become the international leader in the space industry through maximum team-centered innovation and strategically targeted aerospace initiatives.” Fortunately, JFK was more intuitive than a modern-day CEO; he knew that opaque, abstract missions don't captivate and inspire people. The moon mission was a classic case of a communicator's dodging the **Curse of Knowledge**. It was a brilliant and beautiful idea — a single idea that motivated the actions of millions of people for a decade.”

Made to Stick - Chip Heath & Dan Heath
© 2007 Random House

“Partly due to the Great Recession, partly due to rapid advances in technology, and in part due to changes in our cultural norms, we have entered into what I refer to as the **Age of the New Normal**. And this New Normal is affecting every facet of how organizations conduct their businesses, from raising funds to using new technologies to workplace issues.”

“The **Age of the New Normal** demands that you start seeking alternate sources of funding. Despite these hard economic times, there is money to tap into.”

“A lot of the available non-government money that's out there is in the hands of people who made their fortunes in the private sector. Many are seeking to support good causes. But only organizations that can effectively and clearly make their case by successfully explaining to these potential funders who they are, what they do, how they do it—and most important, why it matters—will be on the receiving end.”

Larry Checco
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WAVE ONE GROUP
the power of storytelling

How to Effectively Evaluate Consultants

By Holly Paige, Wave One Group

Assuming your organization is ready to take the plunge, here are some key questions to help you and your internal team find the consultant that's right for you.

1. Does the consultant "get" the culture and mission of my organization?
2. Is the consultant willing to listen to what I want/need?
3. Does the consultant's communication style match mine?
4. Is the consultant's point of view/process/ approach a good match for my organization?
5. Does the consultant clearly articulate roles/responsibilities, deliverables and timelines?
6. Does the consultant respect my dollars?
7. Does the consultant work and play well with others?
8. Does the consultant have my best interests at heart?
9. Is my organization willing to let the consultant do what he/she does best?

Bonus Question:

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**Ways to Improve Your Success by Using Fundraising Consultants
A Joint Nonprofit Association of Oregon and WVDO Workshop
Where and How to Find a Consultant – Resources**

While there is no magic to where and how to find the right consultant, the following considerations and resources listed below will prove invaluable to the vetting process:

Identify and Articulate You Believe You Need: Have clarity about what your organization is seeking from a consultant **and** be open to having those assumptions questioned. Good fundraising counsel will challenge you and your assumptions.

RFPs: A well-developed RFP might introduce you to emerging, talented, capable, and accomplished consultants who may not be as well known as other more established practitioners. A time-consuming, overly complicated RFP can discourage capable consultants from expressing interest in your project.

The “it” factor: Chemistry, chemistry, chemistry! You can most likely identify several consultants with similar qualifications and accomplishments. The match is only complete when someone who brings the right chemistry can connect with you and your board to build trust.

Networking: Network with your leadership team, board, your banker, and strongest supporters to identify consultants whom they have successfully worked with previously. These consultants could be a very strong match for the organization’s need.

Connect with Brenda Ray Scott, CFRE, at:

Get **Fundraising Savvy**™ at <http://adeptdivaconsulting.blogspot.com/>
Link with Brenda at [@adeptdiva](http://www.linkedin.com/in/brendarayscott)

General Resources:

Fundraising professionals:

<http://afporegon.afpnet.org/> (Association of Fundraising Professionals Oregon & Southwest Washington Chapter)

<http://www.grantprofessionals.org/index.php> (Grant Professionals Association)

<http://www.wvdo-or.org/> (WVDO - Willamette Valley Development Officers)

Guidelines, Codes, and Standards

AFP Website

<http://www.afpnet.org/Ethics/content.cfm?ItemNumber=3093&navItemNumber=536>

Great link that includes more than just the typical AFP Code of Ethical Principals and Standards.

Donor Bill of Rights

<http://www.afpnet.org/Ethics/EnforcementDetail.cfm?ItemNumber=3359>

Take the time to review this important document. It reminds staff and consultants alike that the donor is at the center of these working relationships.

Resources are continued on following page.

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Hiring a Fundraising Consultant

by Kim Klein

June, 1999 Vol. 18, No. 3 Grassroots Fundraising Journal (*Excerpted from Fundraising for Social Change, Third Edition by Kim Klein.*)

http://www.grassrootsfundraising.org/howto/hiring_consultant.pdf

Great article. This quote summarizes what the organization and their consultant must fully own: “They must know what they can do for an organization, and what an organization can only do for itself.” Ms. Klein says that fundraising consultants cannot “Guarantee their work.” I think the intent is to say that no professional fundraising consultant can “guarantee” that a donor, foundation, or other type of funder will contribute to an organization. As I tell my clients, I guarantee the professionalism of my work.

Hiring and Working with a Consultant

by Linda Lysakowski, ACFRE, President/CEO Capital Venture

AFP Information Exchange

<http://afp.files.cms-plus.com/secure/index.cfm?FileID=20938&token=39398&userID=20237>

Ms. Lysakowski shares some great insights and tells us that chemistry is not just a course at school!

“10. Remember that the chemistry between your staff and board and the consultant is one of the key ingredients of a successful relationship if not **the** key.”

Hot Topics: Consultants and Consulting

AFP Website

<http://www.afpnet.org/BBTDetail.cfm?ItemNumber=4503>

“In this Hot Topic paper we will address both. Much of the material herein is from AFP's Information Exchange paper [Thinking About Becoming a Consultant?](#) by Linda Lysakowski and AFP's Ready Reference guide [So You Want to Be a Consultant](#), by Henry (Hank) Goldstein.”

This article includes important information for those working on “either side of the desk” and describes the process of selecting and managing a consultant.

The Ethics of Consulting Fees

By Robert Pierpont

AFP Website

<http://www.afpnet.org/Publications/ArticleDetail.cfm?ItemNumber=3350>

I'm a consultant, not a broker. “In an article for Management Issues (December 1995), Pierpont crystallizes the distinction: "An act of philanthropy is not truly an economic exchange and, consequently, a fundraising executive is not a broker.”

