

FREQUENTLY ASKED QUESTIONS: CHOOSING A FUNDRAISING CONSULTANT

Q. How do I evaluate the firm's experience?

A. Ask the firm these often-overlooked questions:

- What services does the firm offer?
- How many planning studies have they conducted?
- How many development assessments have they conducted?
- How many interviews have they done?
- What are their references saying?

Q: If all firms seem qualified, how can we make our final selection?

A. Choose the firm that's the best fit—remember, you are entering a relationship. Ask yourself:

- Do you like the firm's representatives?
- Is the firm responsive?
- Will your board, donors and prospects respond to them and their style?

Q. What should I ask the firm's references?

A. Have this list ready when you make the call:

- Did the firm's recommended strategy work?
- Did their partnership add value to your development program beyond your campaign?
- Did you always get the personal attention you deserved? Were they highly accessible to you?
- Did they present and interact well with your board and leadership staff?
- Did they leave your entire organization stronger than they found it?
- Would you hire them again?

Q. Who will be the person working on our project?

A. Some firms may assign someone to you who was not a part of the initial presentation, so it's important to find this out up front. Each firm has its own way of handling projects. Be sure to ask any firm you consider whether they offer principal involvement in every step of the process, or just in the sales and final presentation interactions.

Q. What is the value of working with a firm versus a solo practitioner?

A. With a firm that employs a team approach, you get many minds—which means a variety of perspectives and experience to draw upon. Another advantage is availability—with a team, someone is always there for you.

Q. Why does the cost vary firm to firm for the same product?

A. What might seem like the “same” product starts looking very different as you get into the project. Building fundraising capacity is not an expense, but an investment. Likewise, starting a campaign is like starting a new line of business: there will be start-up costs—and if undercapitalized, the entire organization can suffer in the end. Costs of a planning study or development assessment are based on the number of people contributing to your project, level of experience, reputation for results, and professionalism. Another key factor is the level of customization in the final written study—are you receiving analysis and recommendations tailored to your organization, or is the report nearly identical to what the firm's other clients receive? In short, you get what you pay for.

With The Curtis Group, you gain access to decades of experience, exclusive fundraising research and a team of highly respected and connected consultants. The Curtis Group has conducted over 5,000 planning study interviews and worked with over 200 nonprofit clients since 1989.