Once a non-profit organization decides to hire a consultant, a process begins that can be either pleasant and efficient or costly and ineffective. The following observations are based on many years of working with a great variety of groups – schools, colleges, hospitals, arts organizations and social service providers.

When the services of a consultant are warranted and when a non-profit group has decided to seek out those services, one individual should be charged with directing the search. This person could be the chief development officer or member of the board. The organization should determine how much money it has to spend on a consultant and approximately what kind of help it requires of a consultant. If, for example, the firm is going to be required to write proposals to foundations, plan special events, produce brochures and so on, this information should be provided to prospective consultants. Such planning and sharing of information makes it possible for the firm to provide an accurate estimate of the costs of its services.

Most non-profits follow similar procedures when looking for a consultant: They request materials from a number of consulting firms. The firms respond by sending materials that generally contain a description of the firm's staff, a list of clients with whom the firm has worked and some statement of the consultant's views on fund raising.

These materials are then scrutinized by the group's staff and board, and several firms are chosen to be interviewed.

Firms are then interviewed, usually by the executive and development directors and two or three make the "short list" and are asked to submit proposals.

After a second round of interviews, usually with members of the board, the group checks references, chooses a consultant and negotiates a contract. Then the relationship begins.

During this process there are a number of "do's" and "don't's" which every non-profit should consider to ensure that its time is well-spent and that the consultant they choose is the best one for them:

1. Do read the firm's literature carefully and learn as much about the potential consultant as possible. Breadth or experience of the principals is important. So too is the quality of the overall presentation. If anything you read elicits questions, write these down, for they will be helpful in the event that you eventually interview that firm.

2. Don't think you have to hire a firm that only works with clients similar to you. By serving organizations that differ in focus and size, a consultant increases his/her breadth of experience. Firms that work with many different non-profits generally maintain a fresh approach to fund raising and avoid doing things according to set

formulas.

3. Don’t hire a consulting firm without knowing exactly which individual will take responsibility for your project. It is important that the principal consultant be highly experienced and qualified and that he/she provide the right “fit” for your organization.

The following anecdote was related to me by a client:

“I asked during an interview,” she said, “whether the gentleman I was speaking with would be the actual consultant on the job.”

“ No,” he replied cheerfully, “probably not. But the person we do assign will be exactly like me.”

Needless to say, the person did not get the job.

4. Do ask to see examples of completed work. The quality of feasibility study report, for example, is determined by its precision. If the document reports only vague perceptions and fails to make a detailed analysis and exact recommendations, it is worthless to you. A campaign plan is good only if it is realistic and comprehensive. Remember that a lot of writing goes into successful fund raising – proposals, plans, letters of all kinds – and the ability of a consultant to know the difference between effective and ineffective writing can be extremely useful to any organization.

5. Do ascertain that a consultant will be flexible as your needs change. An initial contract is written with a number of assumptions in mind: the size and experience of the client’s staff, the scope of the campaign and the level of voluntary development leadership. But things change and your consulting needs change as well. The flexibility of a consultant can be determined by asking direct questions and by just getting a sense of the person you are interviewing.

6. Don’t engage the services of someone who does not understand the essential nature of your organization. This is not to say that a consultant needs to be a physician to help a hospital raise funds or that he/she needs to be a dancer to work with a ballet group. But if you do not get a sense that the individual understands and can speak intelligently about your organization and its mission, the relationship will probably not be a fruitful one.

7. Don’t hire anyone who lacks the personal qualities that you particularly value. A sense of humor, for example, is very important when the going gets tough in a campaign. Long, tense meetings are not uncommon, and a consultant’s ability to relate well to your board or steering committee is very important. The consultant is someone with whom you spend a considerable amount of time, so be certain that she/she is someone you want to be with.

8. Do find a consultant who has the ability to motivate volunteers. While the consultant does not raise money, the organization's volunteers do, and their motivation is critical to any fund-raising activities.

9. Don't waste your time by interviewing too many potential firms. If you have frank discussions about your needs before you start interviewing, you should be able to find a reliable and effective firm from among several established companies. You don't really learn much by interviewing a dozen or more firms and you do waste valuable time, both yours and the consultant's.

10. Do make a decision in a timely manner. It is not infrequent for non-profits to express a great sense of urgency about the need to raise funds only to put off the decision to hire a consultant for many months – time which could have been spent productively. It is helpful to draw up a time line for the process of interviewing and checking credentials and to abide by this schedule. If both the group charged with the decision making and the potential consultants are aware of this schedule, both parties benefit.

11. Finally, to check credentials. There is no better way to determine how good a consultant is than to speak with his or her clients. The more references you check, the better of a picture you will get of the person and the firm. It is especially useful to find out if a consultant is available when a client needs to help and if he/she responds quickly to calls. Good consultants are busy people, but an overbooked consultant won't be there when you need him/her. Reference checking should focus on current and recent clients, since the person who worked with the consultant may no longer be there if you go back too far. Make sure that the consultant gets along equally well with staff and volunteers. Hiring the right consultant can make a difference achieving your fund-raising goals, so be thorough and choose well!