

Why Hire a Consultant? **What You Should Expect**

Often, YMCA leaders – especially volunteer leaders – wonder about whether or not to hire a consultant in their feasibility study or campaign efforts. After all, this is an expense to the campaign that might be better spent in facilities and equipment for the YMCA.

While there are situations where a YMCA might consider going it alone, those situations are few and far between. Usually this occurs when staff is so professional and experienced and so large that it can provide the benefits of outside counsel “in house.” Many YMCAs that fit this profile choose to hire counsel anyway. They prefer to take advantage of a consultant’s depth of experience and objectivity in managing the capital campaign process. They recognize the need to concentrate on the time and energy it takes to maintain and enhance day-to-day operation of the YMCA.

The questions are still asked – especially by volunteers:

- Are consultants always necessary?
- Aren’t they expensive?
- Don’t we have the local talent to handle this?
- Won’t we be criticized because part of our campaign budget includes fundraising costs?

There is often agreement that consultants are useful – if not absolutely necessary – in helping an organization conduct a fundraising feasibility study. A consultant’s involvement provides an impartial view and the ability for prospective donors, leaders and “key influencers” in the community to share their support and concerns about an organization and its plans in a structured, confidential setting.

But how can a consultant make a difference in the success of your campaign? The YMCA of the USA’s Manual for Capital Development outlines these key factors:

- They bring a depth of experience and expertise as full-time campaign directors. They can bring many options to the table for the organization to consider.
- A consultant provides objectivity, an outside point of view, one that is unbiased and unemotional. They are immune to the operating pressures that often handicap those who work directly for the YMCA. They can recognize and voice matters that internal staff do not recognize or may be reluctant to discuss.
- Consultants bring a single mindedness of making the campaign successful—they aren’t called upon to worry about YMCA operational and personnel issues and they don’t have a “full plate” of other responsibilities like your present staff.
- Consultants increase the YMCA’s productivity and efficiency by allowing it to engage in activities to which staff cannot effectively devote adequate time.
- Fund raising consultants are cost-effective and have a high success rate. The cost of hiring counsel is frequently less than the amount it would cost the YMCA in interest if it borrowed the money.
- They bring persistence and focus.
- They bring proven systems, practices and answers for all the stock negatives.
- Consultants are particularly useful in developing a case statement and positioning the project to make it more compelling. People closest to the Y tend to simplify the case—“We are worthy and therefore others should help.”
- A good consultant provides professional fundraising development and training for staff and board.
- To quote a former NAYDO leader: “He/she who directs his/her own capital campaign has a fool for a client and a fool for fund raising counsel.”

PREPARATION

The foundation for a successful campaign lies in the quality and care that goes into preparing for the campaign. Commonly, that preparation includes assistance with a good project proposal (to be tested in a feasibility study) and a thorough and demanding case statement.

BUDGET DEVELOPMENT

Campaigns must operate from a well-conceived, realistic and board-approved budget. This gives staff a planning tool and gives campaign leadership the authority to determine the extent and timing of expenditures. A professional consultant should not only advise you on what you may and should plan to include in a budget, but can also assist in providing a rough idea of how the overall budget fits in with a campaign flowchart and calendar. This can be invaluable in projecting cash flow during a campaign.

TRAIN AND MOTIVATE VOLUNTEERS

A maxim in successful campaign solicitations is that calls be conducted person-to-person and peer-to-peer. This means that the vast majority of solicitations to be led by volunteers and volunteers must be recruited and trained. A consultant should provide you with materials to help train you and your board to recruit campaign volunteers and how to solicit for campaign pledges.

Asking for major gifts can be scary business. A consultant can help you train and motivate volunteers so they feel equipped to be effective on their calls. Once the calls are in progress, the consultant should assist you with reporting systems to track progress. And, as part of the campaign strategy, the consultant should help you structure meetings and devise communications vehicles to motivate and encourage volunteers to complete their calls.

CAMPAIGN MATERIALS

Campaign materials are an important to the success of any campaign. They must be professional, clear, concise, and must speak directly to the prospective donor. They must be presented in terms the prospective donor can understand and relate to. They generally contain specific language that helps the prospective donor understand the need (budget), what their investment will create (benefits), how they can make a gift (cash, pledges, etc.) and what recognition will be provided. The most effective materials tell the case in “people terms” and convey the passion and personality of the organization through graphics and the written word. A consultant can help guide you in preparing materials and effective design. A consultant should also be able to guide you to (or provide you with) outside professional creative support for your materials.

STAFF DIRECTION

Even accomplished development professionals can use guidance and support in working with their CEO and volunteer campaign organization. And, it’s important not to forget that campaigns often require the involvement of other staff – from program and space planning to budget formulation, to accounting for pledges, to their own gift commitments to the campaign during the “Inner Family” phase. A professional campaign consultant will train your development staff to conduct the campaign and help the staff understand campaign principles and the campaign process, recognizing their responsibility to the ongoing operations of the organization.

DEVELOP AND MONITOR PROGRESS TOWARD CAMPAIGN STRATEGY

The development of campaign strategy consists of applying sound fundraising principles to each unique “community” the fundraising campaign will involve. A consultant will help your organization understand these broad principles and help translate them to your particular campaign effort.

Keep in mind, too, that successful campaigns should follow – and even stay ahead of – the campaign calendar. But campaigns do not always proceed in straight-line order according to the original campaign strategy. In some cases, timely and perceptive analysis of early results can make the difference between success and disaster. A consultant should be flexible and should be able to “look down the road” several weeks or months to suggest changes to your campaign plan that will address unplanned contingencies. A consultant should also be alert to new opportunities as they arise and help you incorporate them into your campaign plan.

ONGOING CAMPAIGN EVALUATION

Objective evaluations should occur throughout the campaign, not just when the campaign is wrapping up. As part of campaign monitoring, your consultant should help you assess progress and re-shape goals and timelines throughout the campaign.

What You Shouldn't Expect From Your Consultant

A Compelling Case. The consultant cannot establish your needs and priorities for you, nor should they direct decision-making regarding the project (case) that is the basis of the appeal. While they can help you package your vision attractively, they cannot produce needs and a strong case for support where none exists.

Leadership Commitment. A consultant cannot manufacture the relationships and commitment of your highest level of volunteers. While the consultant can assist you in identifying and provide strategies for cultivating and recruiting campaign leadership, it is ultimately your organization's responsibility to supply or attract that leadership.

Solicit Funds. You hire a consultant for their expertise, knowledge and direction, not their contacts. While consultants can help you research prospects, provide effective solicitation strategies and train staff and volunteers to carry out those strategies, the consultant is not your "hired gun." Similarly, they cannot produce donors or financial support for a cause the community is not prepared to support.