



How to choose the right fundraising firm

Guidelines to Winning

There are a number of good fundraising firms. A handful are outstanding. And a few are absolutely great. Among this latter group there will be one which is precisely right for your organization and situation. Here are fifteen factors which will help in establishing your guidelines to winning.

- 1. Interview at least two or three companies for your program.** The good firms share many qualities in common but there will be subtle variations. And it will be those factors and characteristics which will make the consequential difference in your program. Mark Twain said: "They may sound much the same but it could be the difference between a lightning bug and a lightning rod."
- 2. Develop a checklist of the criteria and services you are seeking and use the list at every presentation during the interviewing process.** A grading system with weighted points will be valuable. Make certain that each member of your Selection Committee can be present for every presentation.
- 3. Provide sufficient time for a complete presentation and a thorough question and answer period.** Anything less than one hour is not in your own best interest. Immediately following the interview, after the presenter has left, take some time to discuss the features and advantages of the firm and make an evaluation and appraisal.
- 4. Check carefully the firm's record.** Does it have extensive and successful experience in working with other institutions similar to yours. Ask for references and call to find out what they have to say about the firm you are considering. In some ways, fundraising companies are like runners—among them are sprinters, and some run the marathon. Both are valued for their own contest. Determine which firm is best for your particular program.
- 5. Make certain the firm shares the same ethos as your institution.** The same philosophy. The same sense of mission. Not every company, no matter how sterling, is precisely right for your institution. Be careful to choose the group which most meets your standards and criteria. Ask yourself if you would be proud to have the firm represent your organization to your constituencies and community. Good firms work within a rigid framework of principles which guide their relationships. Ask for it in writing.
- 6. Insist upon a thorough analysis to determine the feasibility of your program.** It is the one way certain to assure a valid exploration of your assets and any problem areas which might exist. If a firm offers a free study, eliminate them out of hand. That kind of study will be worth about what you pay for it.
- 7. Ask to see a copy of a Feasibility Study the firm has done for another client.** This should probably be one from an organization totally unfamiliar to you and your group in order to protect the confidentiality of the report. Review it carefully. Mies van der Rohe said that "God is in the details." See if the study report is detailed and specific. Look for innovations and an analysis which develops the full potential of a campaign program. If the study reads like a sales document, you will probably be choosing the wrong firm.
- 8. Be clear and specific about time commitments.** The officer of the firm you prefer may have made a dazzling presentation. We have made a few in our time! If you choose the firm because of the person who made the presentation, make certain you understand precisely how much time he will devote to your project. Before you sign a contract, be sure the commitment is outlined specifically.
- 9. There is no particular virtue in size.** The biggest firm is not necessarily the right one for you. But the firm should be large enough to have a team of able and skilled people. They should be able to provide strong capabilities in necessary research, planned giving, and foundation search.
- 10. The capability to communicate effectively and dramatically is essential.** Sizzle! Choose a firm with the kind of talent that can design and write exciting and compelling campaign literature. Material that motivates and causes people to jump over fences they never thought possible.
- 11. The firm should have a program for providing you with detailed progress reports on a regular basis.** Strategy meetings should be held at least weekly to monitor progress. If the campaign is not meeting its action-calendar and game plan, be certain the firm's supervisor is willing to return to your community for a meeting at your call. Find out how the firm monitors its program from the home office and how many supervisory visits are planned. Put it in the contract.
- 12. Look for a firm which demonstrates vitality and boundless enthusiasm.** These attributes will not necessarily win your campaign, but they will go a long way in motivating leadership to greater vision and bolder dreams. Choose a firm "with spring in its heels."
- 13. Choose a firm willing to be bold and venturesome.** The conventional and commonplace will often not be good enough for your program. What is required is innovative strategy and imaginative planning. Old rules and standards may not apply in your situation. Flexibility and creative application are operative factors to success.
- 14. Although cost is an important factor, do not necessarily choose the cheapest.** It may not turn out to be the least expensive. Fundraising gives a high priority to the bottom line. The emphasis must be on what you raise, and not necessarily how much you spend. What counts is the difference between the two, and meeting your net objective.
- 15. The firm should bring to your program the same high sense of dedication and commitment as that which is expected from your Board and staff.** Nothing is more important to your organization than the winning of this campaign. Nothing. Your program should be more than just a professional puzzle to be put together. It should be close to a love affair.

Fundraising is a high adventure. It is an extraordinary celebration of art, science, and detail. And the greatest and most elusive of these is art. If you choose the right firm and your campaign is as successful as it should be, it will mark a high point in the history of your organization. It will provide some of the most exciting and exhilarating experiences you have ever known. Magic moments. Choosing the right firm can assure the funds you need and at the same time, generate a swell of good public relations which will accrue to your institution for years to come. We have a checklist which will be helpful to use during the actual interviewing process. Write or phone us today for up to thirty-five copies of this appraisal form. j.p.

The Idea
People



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