

Who's Driving the Car?

Have You Considered
a Rental Car?

Working with a
Consultant



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Why Do You Rent a Car?



- Strange city & need transportation
- Need to save miles on your car
- Short-term car repair
- Worse case – wrecked your car
- Scared to fly - rather drive
- **Parallels to hiring a consultant**

Who's Driving the Car?

- Mission – Vision – Values
- Culture
- Board of Directors
- President – CEO – Executive Director – Leadership
- Donors – Patrons – Supporters
- Volunteers
- Staff

In Collaboration with a Consultant

What is the Role of the Consultant?



A Catalyst for Change Because

- A self-assessment of your organization
- Objectivity – a different lens
- An investment of time – not immediate
- It is a process
- Leadership committed to change
- Are we really ready to change?



Don't Hire a Consultant if.....

- If the ship is sinking and you think only the consultant has all of the life rafts
- If your organization lost a major source of revenue and you need fast money
- If your organization believes that a consultant will bring a well cultivated list of prospects/donors
- If the consultant will “make the ask” and Board & staff can take a break
- If you want a consultant to function like a Board member

Client Case Study # 1

Organizational Background:

- Small nonprofit
- No formal fundraising program – gifts primarily from individuals or bequests
- No history of funding from grants

Opportunity/Challenge:

- National foundation has made a major 6-figure grant available and wants to fund this organization
- Staff had limited experience with the grant process

Role of Consultant:

- Project management: review funding guidelines, develop timeline, budget preparation, theory of change, completing all forms, editing all documents & preparation for site visit

Client Case Study # 2

Organizational Background:

- Medium size nonprofit
- Established fundraising department

Opportunity/Challenge:

- Inexperienced and ineffective fundraising leader
- Staff had limited experience with individual, corporate or foundation donor cultivation
- Organization wanted to start a campaign

Role of Consultant:

- Conduct a feasibility assessment to test viability of a campaign
- Provide Board training
- Serve as campaign counsel
- Assisted with search for new advancement position

Client Case Study # 3

Organizational Background:

- Small nonprofit
- No dedicated fundraising staff

Opportunity/Challenge:

- Many organizational changes
- Interested in starting a campaign
- Re introduce themselves to donors
- Dedicating resources to fundraising

Role of Consultant:

- Created a limited year-end donor cultivation plan

Client Case Study # 4

Organizational Background:

- Medium size nonprofit
- Young fundraising effort – no major donors

Opportunity/Challenge:

- Organization had opportunity to purchase real estate to expand facility and services
- Wanted to do a campaign, but did not want to do a feasibility study

Role of Consultant:

- Without a feasibility study – they needed to relay & listen to the experience of the consultant
- Board & Staff training
- Best practices and strategies that produce results

Before You Sign that Rental Contract

- Ask for an interview before you request a proposal or sign a contract
- Compatibility - Sit down & talk - do you believe they understand your organization
- Involve your Board
- Track Record - Do they have the experience and skills that you believe you need
- Be specific about the scope of the work you desire completed

Go Drive that Car



Questions?



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