

Index

- Alford & Associates/the Alford Group, XVII, XIX, XXI, 46
- Association Foundation Group (AFG), 84
- Association of Fundraising Professionals (AFP), V–VII, XV, XVII, XXII, 78, 84, 85, 94, 103
- Certified Fund Raising Executive (CFRE), 94
- Code of Ethics and Professional Practice, 62, 109, 111, 203
- Donor Bill of Rights, 204
- Fund development series, V–VI
- Publishing Advisory Committee, VI–VII
- Campaign committee, 36
- Campaign materials, 36. *See also* Working with your consultant: written materials
- Campaign phases, 36
- Campaign planning study. *See* Consultants: services
- Campaign policies, 36. *See also* Working with your consultant: written materials
- Campaign prospects, 36–37
- Campaign schedule, 37
- Capital campaigns, 35. *See also* Consultants: services
- Case for support (case statement/case prospectus), 7, 122, 159–160
- Chicago Community Trust, the, XVII, XIX, XXI
- Comprehensive campaigns. *See* Capital campaigns
- Consultants
- Best, 193–195
 - Expenses, 63–65
 - Travel expenses and savings, 63–64, 65

206 INDEX

- Consultants (*Continued*)
- Fee structures, 53, 60–61. *See also*
 - Consultants: proposal for services
 - Alternative arrangements, 61–63
 - Percentage of dollars raised, 62–63
 - Focus, 22
 - Information collection about
 - Colleagues in professional associations, 103
 - Consultant,s web site, 91–99
 - Consultant,s work/products, 99–100
 - Informal contacts, 103
 - Online search engines, 104
 - Reference checks
 - Importance of, 100
 - Questions to ask, 102
 - Selection by consultant, 100–101
 - Request for proposal response, 89
 - Using other sources, 90–91
 - Interviews with. *See* Interviews: consultant prospects
 - Issues to address, 22
 - Planning, 22
 - Proposal for services
 - Analyzing, 112–114
 - Confidentiality, 115
 - Delivery of services, 121
 - Fee and expense structures, 116–119. *See also*
 - Consultants: fee structures
 - Legal or ethical disclosure, 123–124
 - Materials, reviewing and editing, 121–123
 - Objectives, 108–109
 - Product/outcome definition, 124–125
 - Registration and contract filing issues, 123. *See also* State registration: contracts
 - Revising and negotiating, 125–126
 - Sample outline, 109–111
 - Solicitor registration, 124. *See also* Solicitors, State registration
 - Timelines, 120
 - Who does what, 114–115
 - Selection. *See* Selection of consultant or firm
 - Services
 - Advice for enhancing fundraising, 53
 - Campaign management or on-site campaign management, 34
 - Capital or major campaign, 36–37. *See also* Capital campaigns
 - Development audit or assessment, 27–31

- Donor/philanthropic climate assessment, 37–41
- Enhancing fundraising skills/training, 47–50
- Facilitation, 50–52
- Feasibility study or campaign planning study, 31–34
- Differences, 34
- Fundraising/new sources, 41–43
- Major donor prospects, 43–47
- Planning/strategy development, 50
- Service recommendations, 26
- Sources for finding
 - Internet, 87
 - Organization, 79–81
 - Other organizations, 81
 - Professional organizations, 84–85
 - Professional organizations of consultants, 85–86
 - Workshops, seminars, conferences, 81–84
- Variety and styles, XXIII
- Working with. *See* Working with your consultant
- Consulting field, growth of, XXII
- Consulting, successful, XXIV
- Contracts
 - Attorney review, 143–144
 - Contents if prepared by consultant, 142–143
 - Contract preparation alternatives, 140–142
- (*see also* Organizations–Decision to hire)
- Report presentation steps, 12
- Council for the Advancement and Support of Education (CASE), 84, 94, 103
- Development assessment. *See* Consultants: services
- Development audit. *See* Consultants: services
- Donor/philanthropic climate assessment. *See* Consultants: services
- Feasibility study. *See* Consultants: services
- Fees. *See* Consultants: fee structures
- Focus groups/group interviews
 - Areas covered, 40
 - Participants, 40
- Foundation Center, 175
- Foundations and corporations, 41–43
- Fundraising planning
- Giving Institute/Giving USA Foundation
 - Annual Survey of State Laws, XXVIII
 - Giving USA, 49, 85, 135
- Members, 85–86

208 INDEX

- Interviews
 - Campaign planning study, 34
 - Confidentiality, 39. *See also*
 - Consultants: proposal for services
 - Consultant prospects, interviews with
 - Alternate interview methods, 137
 - Focus/post-proposal interviews, 135–137
 - Focus/pre-proposal interviews, 127–135
 - Donor/philanthropic climate assessment, 38–39
 - Feasibility study, 32–33
 - In-person, 119
 - Interview questionnaire. *See*
 - Working with your consultant: written materials
 - Phone, 63, 119
 - Procedures, 157–158
- Laws and consulting, XXV–XXVIII, 123, 124, 141
- National Society of Fundraising Executives (NSFRE), XXI. *See also* Association of Fundraising Professionals
- On-site campaign management, 8–9, 34–35. *See also*
 - Consultants: services
 - Questions about, 9–11
- Organization
 - Commitment to consulting, 11–12, 14
 - Consensus building, 57, 59
 - Costs of consulting, 15–16, 65–66
 - Decision to hire, 16–18, 19
 - Disputes, internal, 3–6
 - Expectations of, 13–14
 - Follow through, 12
 - Fundraising issues, 1, 26
 - Knowing your organization, 55–57
 - Money for, 1, 6–8, 66–68
 - Needs, identification of, 2, 57–58
 - Presenting problem, 25
 - Problems of, 2–3
 - Products/outcomes desired, 59–60
 - Recommendations, 12, 15–16, 32
 - Reference checking, 19–22. *See also* Consultants: information collection
 - Questions, 20–21
 - Registration. *See* State registration
 - Sources for payment, 66–69
- Threats, 12–13

- Proposal for Services. *See*
 Consultants: Proposal for
 services
- Readings, additional, 197–202
- References. *See* Organization:
 reference checking
- Reports
 Findings, 32–33
 Shelved, 11
- Request for proposal (RFP), 55, 89
 Unwritten consensus RFP, 72–76
 Written external RFP, 71–72
 Written internal RFP, 72
 Advantages, 73
 Content, 73–76
- Selection of consultant or firm
 Group process, impor-
 tance of,
 139–140
- Solicitors, XXV, XXVI, 8
- State registration
 Consultant, XXV
 Consulting services, XXVII
 Contracts, XXV–XXVI
 Enforcement, XXVII
 Information, sources of,
 XXVI–XXVIII. *See also*
 Giving USA Institute
 Organization, XXV
 States, several, XXV, XXVII
- State regulations. *See* Laws
- Strategic planning
 Lack of, 7, 51, 59
- Outcomes, 59
- Session facilitation, 50–51. *See*
also Consultants: services
- Surveys
 Donor/philanthropic assessment,
 39
- Tipping Point, The, 176
- Training. *See* Consultants: services
- Working with your consultant
 Creative resources, 166–167
 Credit, 192–193
 Debriefings, 186–189
 Events, 167–168
 First day and steps, 150–151
 Follow-through, 185–186
 General advice and counsel,
 168–169
 General considerations, 169–171
 Issues, 176–180
 Keeping informed, 171–172
 Materials for review, 151–153
 Meetings and conference calls,
 173–174
 Other skills, 174–176
 Partnership characteristics,
 146–148
 Payment issues. *See* Working with
 your consultant: issues
 Planning and scheduling, 172–173
 Primary contact, 151
 Procedures defined, 157–158
 Program staff, 150
 Project focus, 145–146

210 INDEX

- Working with your consultant
(*Continued*)
- Report and recommendations
delivery, 183–184. *See also*
Organization:
recommendations
 - Staff trap, 148–150
 - Timelines and meeting review,
155–157
 - Unwritten information sharing,
154–155
 - Working arrangements, 155
 - Written materials
 - Agendas, 164
 - Campaign materials, 36,
162–163.
 - Case. *See* Case for support
 - Interview questionnaire,
161–162
 - Letter to prospective
interviewees, 160
 - Meeting materials, 164–165
 - Prospecting materials, 165.
See also Consultants ser-
vices: major donor
prospects
 - Policies and procedures, 163.
See also Campaign polic-
ies and procedures
 - Training materials, 165
 - Written materials process,
158–159

