

WPO

# 10 Questions to Ask In Selecting A Capital Campaign Firm

Presented by

**WPO Development**  
Planning & Campaign Management



One of the most important tasks any organization can undertake in the community is that of conducting a capital or endowment campaign. A campaign not only serves to solicit needed development funds, it should also provide a framework for increased public awareness, a heightened commitment to the organizational goals on the part of staff and volunteers, and an excellent opportunity to strengthen board and committee structures.

There is no magic formula that will guarantee the success of a particular campaign. There are, however, specific elements that must be present if a campaign is to succeed. The key components of any good campaign will include:

- Development of a Long-Range Plan of Action
- The Campaign Feasibility Study Process
- Pre-Campaign Planning
- Leadership Cultivation, Recruitment and Orientation
- Gift Solicitation
- Organizational Management and Follow-up

All of the elements are critical to the success of a campaign. However, in preparing for a Campaign, the single most important decision that your organization must make is in regard to hiring the appropriate professionals to manage the campaign. Is the firm sensitive to the needs of your organization? Does the staff have sufficient expertise to handle your unique fund raising effort? Will your interests be properly represented in the community? Will the fund raising expenses be fair and appropriate to the task?

[Here are 10 questions you can ask that will help you make informed decisions about retaining outside professional assistance in managing your campaign:](#)



## **1. Does the firm provide Campaign Management or Campaign Counsel?**

There is a big difference between managing a campaign and providing campaign counsel, and it usually is delineated by the amount of time professional staff will be actively engaged in the campaign process. A good fund raising firm will provide a [Campaign Manager](#) that will handle all of the day-to-day operations of the campaign, essentially becoming an interim staff member for the organization for the term of the campaign contract. Typically when an organization is hiring an outside professional to manage the campaign, it is because they do not have the staff or capacity in-house to manage the process properly. As a result, it is very important to have this hands-on manager to make sure the campaign is successful.

[Campaign Counsel](#) is an entirely different approach, where the professional basically spends a limited number of days each month outlining the organizational structure needed for the campaign, assigning tasks to the organization, staff and volunteers and then following up on what the organization has been able to accomplish in his or her absence. The organization is expected to manage the day-to-day activities of the campaign and depends on Campaign Counsel for

strategies and direction. It is just like the old joke where the campaign counsel shows up once a month and proclaims, "So, how did we do while I was gone!"

## **2. Has the firm successfully managed campaigns with a broad range of organizations?**

Although similar in structure, all campaigns are not alike by any means. For instance, there is a significant difference between managing a campaign for a school versus managing a campaign for an organization like The Salvation Army. In the case of the school, it is really a "closed system" campaign with the Board of Trustees, parents and grandparents of students, parents and grandparents of future students, and so forth. In essence, before the campaign starts your audience has already been defined and is finite. In the case of The Salvation Army, however, the campaign structure has to be entirely different in that there are no alumni or service recipients to go to for funds. The campaign would have to be an "open-system" structure, wholly dependent on the generosity of those in the community who recognize the need for Salvation Army services. Other than the Board and those very closely associated with the organization, there is no clear vision of who will eventually be involved in the



campaign, so it calls for much more focus on identifying and cultivating key leadership to make the effort successful.

Because each campaign has unique needs, it is very important that the firm you choose has a broad range of experience with various types of campaigns so opportunities can be recognized and the campaign can be structured according to the needs of your command.

### **3. Will the Campaign Manager make solicitation calls?**

Once again, one of the primary differences between Manager and Counsel is in making calls for the campaign. Although it is widely recognized sound campaign structures are dependent on a strong volunteer base to open doors and make calls on prospective donors, a good Campaign Manager and support team will work hand-in-hand with those volunteers to make solicitation calls and serve as support for the campaign. There are many firms that will not actually go along on solicitation calls, so this is a critical question to ask.

### **4. Will the Manager be on site full-time or part-time? How many days per week/month?**

It is important to clarify exactly how much time the professional will be spending in management of the campaign. Our experience has clearly shown management of a campaign requires a sound campaign plan and a great deal of hard work. To accomplish all that is required in management of a campaign, the professional should be on-site a minimum of 2-3 days per week or more, depending on the size and scope of the effort.

### **5. Will there be a campaign office or local presence established with administrative staff?**

As simple as it sounds, it makes a significant difference to have a dedicated office space and support staff for a campaign. Most organizations have more work than they can say grace over within their daily operations, so the additional workload of a campaign component and its requirements can become overwhelming. Also, it is critical to the campaign to have staff with the singular focus of accomplishing the goals of the campaign, which in turn translates to a more efficient and effective effort.



**6. What support resources will the firm provide to its campaign manager and to your organization?**

Beyond the personnel provided to manage the campaign process, what should you expect in terms of support services from the fund raising firm you hire? A competent firm will be able to provide a myriad of support personnel and services as a part of the campaign contract including:

- Leadership Awareness / Publicity Programs
- Campaign Structure and Organization
- Volunteer Recruitment/ Orientation
- Board Development/ Utilization
- Donor Identification and Research
- Planned Giving / Estate Gifts Programs
- Media Relations
- Case Statement Materials
- Solicitation Materials / Campaign Brochures
- Foundation Grant Applications
- Grant Writing
- Government Grant Applications
- Campaign Newsletter and Other Communications
- Computerized Pledge Management System

In the end, what you are looking for is a team of professionals that can address every aspect of campaign operations.

**7. Who specifically will be assigned to the campaign?**

The background and capacity of the fund raising firm is important in the overall consideration of reviewing the management team, but more important is the specific person who will manage the campaign. More often than not, the person who sells the services of the firm is not the person who will actually manage the process. So, make a point to find out who will be assigned to your campaign.

**8. What is the track record of this individual versus that of the company?**

In further arming yourself with the right information, make sure you get the individual's track record, and not just that of the company. The firm may be able to point to past successes, but the individual's track record may not be so promising. So, it pays to get specific.



**9. What fees are associated with management of the campaign? What additional expenses will be incurred?**

Although the methods for presenting management agreements are too numerous to count, all of them fall into two basic categories: (1) closed-end agreements and (2) open-end agreements.

A closed-end agreement is simply a full accounting of all expenses anticipated to be incurred during the course of the campaign. The open-end agreement is a little more complicated in that the management fee is usually articulated but the expenses are not specified or capped. That is to say, there is no fixed dollar amount for additional expenses (i.e. – travel, lodging, transportation, printing, telephone, etc.) so there is no way to really know what the final bill will be. A solid management proposal will clearly outline all expenses associated with the campaign so the organization and Board can make informed decisions about the associated costs.

**10. How can WPO help my organization to conduct a successful campaign?**

WPO is a national full-service planning and capital campaign management firm providing specialized services to some of the most prominent non-profit organizations in the country. Whether it is helping to build a new school, creating innovative programs to fund community youth programs, or working with public-private partnerships to build a new community hospital, WPO has the experience and talent to manage the process ... every step of the way!

The firm has provided professional consulting services to organizations in arts and culture, social services, the environment, churches and faith-based programs, education, government and healthcare. Since its inception, the firm has provided consulting services to organizations in over 350 cities across the country. The partners and associates of the firm have assisted in raising over \$2 billion for various charitable organizations through their collective efforts.

If you would like a personal conference or wish to discuss your needs please call Keith Waters at (561) 310-6044 or visit our website at:

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