Considerations for Selecting Campaign Counsel

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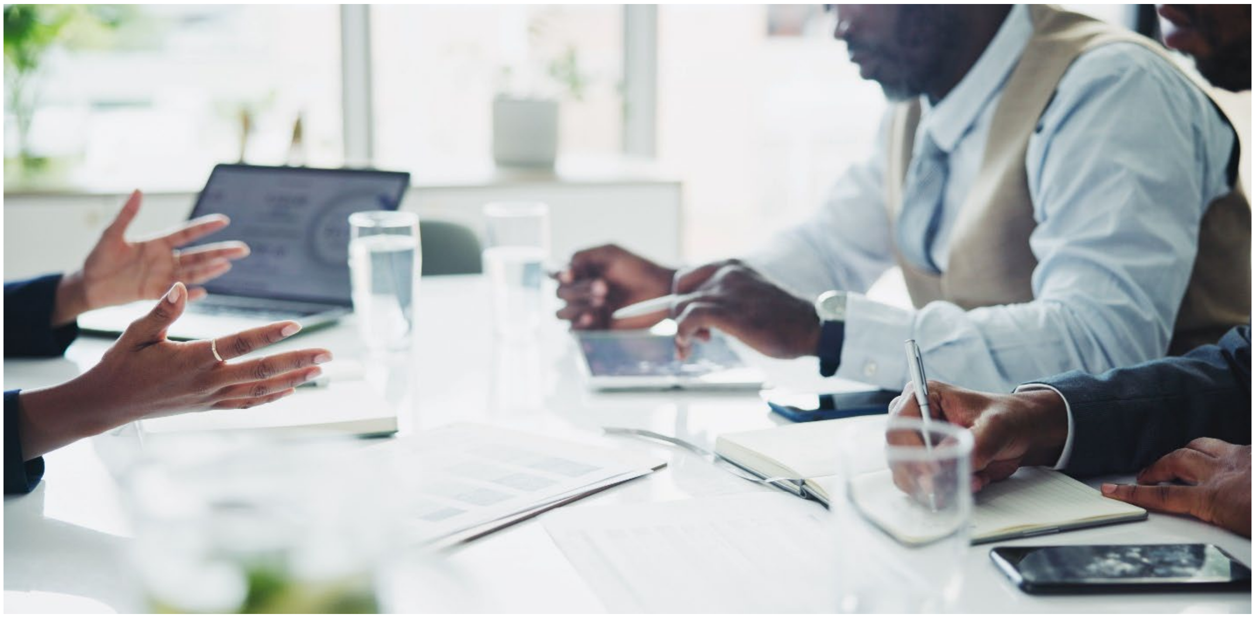

MPK&D

Considerations for Selecting Campaign Counsel

Selecting a trusted and talented campaign consulting partner is the single most important decision you'll make in the campaign planning process. Because of its long-term impact on the campaign success, culture and team, taking the time to make this selection with a clear set of goals and a deep understanding of the kind of partnership your organization needs is a top priority. The following questions were developed as a resource to prepare for selecting campaign counsel.

1. Before Issuing the RFP

> ***Consider Your Specific Needs***

- What is your proposed campaign timeframe?
- Are you considering a comprehensive campaign or a special focus campaign (endowment, capital, special program or priority project such as an investment in athletics)?
- Do you have a preliminary idea of campaign priorities?
- Have you identified a preliminary goal to test in a feasibility and planning study based on past performance and donor base? Consider:
  - Previous campaign results
  - Annual philanthropic revenue
  - Wealth screening current donor pipeline
  - Opportunities to leverage such as leadership, anniversaries, new programs, athletic successes or other activities that could bolster fundraising
- Do you have a "bench" of campaign leaders and ambassadors ready to go, or will this take time to cultivate?
- What is the current level of talent on your team to drive activity in key areas:
  - Major and planned gift fundraising
  - Donor management, recordkeeping and reporting
  - Research
  - Foundation relations
  - Corporate relations
  - Grant writing
  - Annual giving
  - Alumni relations
  - Strategic communications

- Is your institutional story known and shared, or will communications and storytelling need to be strongly enhanced for the campaign?
- Are your alumni engaged, inspired and informed? If not, will this be a goal of the campaign?

> *Define Your Goals*

- Describe, as best you can, what success will look like at the end of the campaign. Consider:
  - To meet or exceed financial goal – *your metrics will be financial*
  - To elevate institutional visibility and recognition– *your metrics will be defined by marketing and PR*
  - To engage, inspire and inform alumni – *your metrics will be defined by participation and giving*
  - Customize additional goals based on *your institutional needs and specific campaign goals*

> *Describe the Level of Support Needed*

Most campaigns begin with a feasibility and planning study to provide an overall assessment and planning structure for the campaign, followed by ongoing counsel to support implementation. The level of support for ongoing counsel can range from strategic counsel to operational support, to full-time, boots-on-the-ground, turnkey support. Generally, MPK&D recommends the middle road – too little support can leave gaps in campaign coverage, and too much support often means that the consulting team replaces staff. **MPK&D believes that a partnership between staff and counsel yields the highest and best results – personalizing the process and providing professional development and strategic support every step of the way.**

General ideas to help you describe the level of campaign support you need are listed below:

- **Develop an inspiring Case for Support** and other campaign materials to advance engagement with prospects and donors for major gifts, including briefings, talking points, prospectuses and proposals. Provide excellent written and communications support as needed.
- **Build a customized Campaign Gift Chart** to identify a priority list of donors and prospects with capacity and affinity for gifts of six figures and higher, including individuals, corporations and foundations. This Campaign Gift Chart must be customized and fully supported to ensure the consulting team is helping to develop strategy, materials, timing and results toward established goals.
- **Support for moves management meetings** under the leadership of the vice president for institutional advancement to accelerate cultivation and generate "early wins" in the campaign.
- **Conduct a major and planned giving audit** of the donor database to identify top-tier donors/prospects and build out a robust pipeline for prioritized cultivation and solicitation.
- **Develop a strategic planned giving program** which operationalizes unique opportunities available to the university within the targeted base of friends, supporters and prospects.
- **Articulate a process for identifying new prospects** to be integrated in portfolios through a routine scanning of annual fund gifts, wealth screening and information sharing across the Advancement team.

- **Support prospect research functions.**
- **Develop 90-Day Campaign Plans** to guide the activity and focus of the president and vice president and maintain focus on the cultivation and solicitation of leadership-level gifts.
- **Promote engagement and education with the deans and chairs** to stimulate greater alignment and success within alumni engagement and participation.
- **Ensure excellent prospect research** to help prioritize and inform campaign strategies, using customized tools and techniques for relationship mapping and wealth screening to develop robust donor/funder profiles.
- **Provide training and professional development** as an ongoing part of the work to build team talent and capacity where needed to ensure sustainable growth.

2. Issuing the RFP

Whether your institution has a regulated RFP process or not, your goal is to simplify it for the consulting groups and for your reviewing team:

1. **Your institution has a standard RFP format and process:** If your institution has a required RFP process, follow it as closely as possible. Do respondents a favor by being exceptionally clear about what you are asking them to deliver, and give them enough information about your preliminary rationale – timing, campaign size, previous campaigns, etc. – to help guide responses. If possible, be accessible to answer questions. The goal is to find the consultant who is the best fit, so avoid obstacles.
2. **Your institution allows you to create your own template:** Keep it simple and straightforward. The RFP is meant to screen consulting groups in or out, but it won't make the decision for you. Simple templates are easier for consulting teams to respond to, and easier for you to review and compare.

Solicit recommendations from colleagues and other professionals who are in campaigns now, or who or have recently completed one, for recommendations for consulting groups to consider. There are large national firms that are easy to identify, and small, customized firms are high quality and often deliver results at a better ROI. Keep all your options open as you look for the "fit" that is right for you and your organization. Be sure you know exactly what you want and what the consulting team can deliver. Do not be vague or allow the consulting team to be vague – you do not want to meet with a principal and later find out your campaign director is new to the firm!

> *What to Request*

- Background/history of firm
- Philosophy/Mission/Values
- Proof points of successful campaigns: get the metrics
- Approach to work, relationship with team, communication style and process, reporting mechanisms
- 2–3 Case Studies that are similar to your institution

- An example of a campaign challenge and how it was resolved
- 4–5 recent references
- The team who will work directly with you, their specific campaign roles and experience
- Rationale on why the firm believes it is a good fit for your institution
- Sample/example of a customized approach to storytelling
- Sample of campaign materials
- Professional fee in two parts:
    - Part 1: for Campaign Planning and Feasibility Study (generally a 3–4 month process)
    - Part 2: for ongoing Campaign Counsel following the completion of the Study

3. Selecting Your Trusted Partner

Appoint a small selection committee to review the RFP responses. This process is meant to identify those that you can eliminate and those that you'd like to contact for more information. Those that can be eliminated by the committee normally fall into the following categories:

- Pricing is an outlier
- RFP response is cookie-cutter; no attempt to customize (which doesn't speak to future efforts)
- Sloppy response: errors, disorganized, didn't follow directions, missed deadline, incomplete
- Lack of required skills, experience or talent
- Firm is not primarily focused on higher education or has no experience with schools like yours
- Just doesn't "feel like a fit" – not right for us

The remaining responses should be contacted by the vice president or her/his designee for a phone interview. The same questions should be asked to each to appropriately compare responses. We recommend that the conversation be conducted with the individual identified in the RFP as the "Campaign Director" or "Lead" to provide the best perspective on leadership and talent.

Once all phone interviews are completed, the selection committee can discuss the outcomes and identify one to three finalists for in-person presentations. This is a critical step and should not be shortchanged.

- This is the time to reach out to references!
- Involve those critical to campaign success: president, cabinet members, board committee members, potential campaign leadership volunteers to sit in on the presentations so they feel ownership in the decision-making.
- Schedule an hour-long session, with 30 minutes of presentation (let the consulting group decide what to do – you want them to do the planning) and 30 minutes of Q&A.
- Allow time to debrief following each presentation.

4. Announcing Your Partnership

Once a decision has been reached, confirm the terms and agreement as quickly as possible so you are able to announce the partnership and start working. Treat your campaign partners as an extended part of your team from day one. Invite them to significant campus events, send annual solicitations to them, ask for sponsorships, plan team lunches and dinners when they are on campus. The personal and professional relationships you build with the consulting team early on ensures you are creating ***ONE CAMPAIGN TEAM*** to support the success of your institution. And, we believe, that's the ultimate goal: one team, working together to propel success for your enduring mission!

For more information or resources in preparing a RFP, please contact MPK&D:

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