

# HIRING A CAPITAL CAMPAIGN CONSULTANT: THE ESSENTIAL CHECKLIST

01

## Discuss the option of hiring a consultant with your board and development committee

Your board and development committee will fund your capital campaign, so their input and buy-in are critical for hiring a consultant.



02

## Understand the role of a capital campaign consultant



Understanding the services that capital campaign consultants offer can help you set reasonable expectations for how a consultant can help your nonprofit.

03

## Do your homework

Ask respected peers in your network for their recommendations and research consultants online through directories offered by professional and community organizations.



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## Start a conversation with your top choices



Talk to potential consultants to determine who can work well with your nonprofit and who inspires confidence in your capital campaign.

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## Submit a request for proposal

Ask your top choices for a proposal that outlines the consultant's process and approach to your capital campaign, as well as the logistical details of reaching their goals and the estimated cost.



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## Check your consultant's references



Call the consultant's former clients and ask them about their experience working with the consultant and whether they'd recommend the consultant for a capital campaign.

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## Choose a consultant and finalize the details

Discuss your top consultant's proposal until you're satisfied with all of the details, and sign a contract to finalize the agreement.

