

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

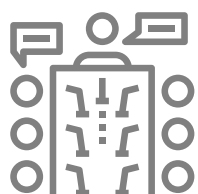
Do your homework

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



04

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.

05

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.



06

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.

07

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.

