

Rating Profile

Selecting the Right Fund Raising Counsel

How do you rate the firm? You should seek a “100 Point” Partner for your Project! Or come as close to 100 points as possible. Use the profile below to make your evaluation, and tally the ratings. Give a grade for each criterion.

0 = Unacceptable 1 = Fair 2 = Average 3 = Good 4 = Very Good 5 = Excellent

- 1 Preparation for our presentation = _____
- 2 Interest in our program = _____
- 3 Past performance for similar organization such as ours = _____
- 4 Sensitivity to our organization and its mission = _____
- 5 Compatibility with our community = _____
- 6 Experience in communities such as ours = _____
- 7 Aptitude for assessing our program in a feasibility study = _____
- 8 Supervision provided by Home Office = _____
- 9 Staff resources appropriate to our needs = _____
- 10 Capability to handle our type and size of campaign successfully = _____
- 11 Skill to interpret our work and service = _____
- 12 Ability to develop proper campaign material = _____
- 13 Innovative plan for our particular situation = _____
- 14 Creative energy and commitment we can expect from Home Office = _____
- 15 Flexibility of services and campaign strategy = _____
- 16 Proper size firm for our program = _____
- 17 Ability to work with our leadership— staff and Board = _____
- 18 Willingness to respond quickly to our needs = _____
- 19 Acceptable fee* = _____
- 20 Credibility and integrity of firm = _____

Total Rating: _____

* In fund raising, the cheapest is not always the least expensive

Total Rating:
 100 Points —You have a sure winner!
 80-99 —Very good to excellent
 70-79 —Only average
 69 or below —Should probably not be considered

Selecting precisely the right fund raising firm for your program is one of the most consequential decisions you will make. No easy problem, this. There are many excellent firms. Among the really good companies, there is perhaps one with the special characteristics, and a combination of skills and talents, that most nearly matches your singular needs. This Work Sheet will help you analyze and evaluate the firms you interview—and help you choose the most effective fund raising counsel possible for your project.

Name of firm: _____

Name of Representative: _____

Personal characteristics of the presenter: Appropriateness of dress, directness, enthusiasm, integrity, response to questions, etc.

Notes: _____

Will the Representative be directly involved in our program?

Yes _____ No _____ How: _____

Your Name: _____

Note: It is most effective if you take at least fifteen minutes following the presentation to discuss the services, depth, and characteristics of the firm. What sets it apart and makes it uniquely suitable for your program. Then complete the Rating Profile on the back page.



Important Items for Discussion or Consideration

You may wish to consider many of these factors in making your decision. Make notes in the right hand column.

Notes:



Experience of the Firm

- 1 With institutions similar to ours
- 2 In cities such as ours
- 3 In our city
- 4 In a broad range of situations and a variety of institutions



Involvement of Firm's Staff

- 1 Time commitment of supervising or lead officers
- 2 Who will conduct feasibility study
- 3 Who will be available for residence service for the capital campaign
- 4 Evidence of quality back-up staff and services from the main office



Feasibility Study

- 1 When can it start
- 2 How much of our staff's time is required
- 3 Evaluation of a sample study ...is it detailed, innovative, perceptive
- 4 How long will the study take
- 5 How many interviews
- 6 Rationale given for number of interviews
- 7 Type of information the feasibility study will provide us



Costs and Requirements

Notes:

- 1 Feasibility study
- 2 Resident campaign costs
- 3 Other staff costs
- 4 What staff from the firm will be provided
- 5 Office space requirements
- 6 Computer requirements



Contract Provisions

- 1 Costs clearly specified
- 2 Performance and quality specifications
- 3 Termination or postponement



Management Methods and Tools

- 1 Regular reporting and monitoring of results
- 2 Supervisory calls by lead officers of the firm
- 3 Role of our staff
- 4 Role of our Board of Directors



Innovation and Ideas

1. The firm's skill in turning problems into opportunities
- 2 Ability to identify with our mission
- 3 Capacity to perceive dynamics of our institution
- 4 Ability to communicate effectively with broad spectrum of our community
- 5 Enthusiasm for this project
- 6 Does firm share our ethos
- 7 Quality of firm's sensitivity, graphic design and writing capability

