

## **Consider a Consultant**

### ***Planned Giving Mentor***

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No matter how experienced we are with planned giving, working with a consultant can be both energizing and profitable. Consultants come with widely varying strengths and personalities, and, no matter what the paper credentials, finding the right fit is all important. You must find a person or firm whom you trust and with whom you feel comfortable.

But why should you use a consultant in the first place? What should you expect from this relationship?

- **Experience:** A good consultant will have done what you are doing. She or he will have developed and managed an effective planned giving program, will have closed a variety of gift plans, and will have a record of effective and demonstrable experience on which you can draw.
- **Perspective:** A consultant will bring perspective, not only from his or her own development work, but also from observing how things are done at many other institutions. Best practices and successful techniques from other organizations can be a critical guide to our own priorities.
- **Objectivity:** A consultant may be committed to your success—consultants *should* care about your results. But consultants are not employees and can step back from current practice to ask hard questions that staff may have difficulty posing.
- **Personalized recommendations:** Boilerplate has no place in the lexicon of a good consultant. Instead, you should get a set of

recommendations tailored to your needs, your aspirations, and your resource limitations.

So you have decided to engage a consultant and the fit seems to work. What will the consultant do for you?

- Conduct An Assessment

One of the best ways of understanding the potential gift planning has for your fundraising office is through an external review of your current program and a complementary strategic plan and vision for the future, conducted by an individual or a team of experts in gift planning. Among other things, this team would

- assess your current marketing documents, including any electronic materials, and evaluate their effectiveness
- analyze your record-keeping and data processing system and make recommendations for using data in more effective ways to identify new prospects, track current prospects, and produce accurate and timely answers to questions from colleagues
- assess your organizational structure and the ways in which gift planning integrates with the rest of your fundraising team, with suggestions on how to make all your fund-raising professionals more comfortable with gift planning terminology and concepts and more adept at carrying on conversations with donors about planned gifts
- evaluate the technical expertise available to your office and opportunities for enhancing the level of that expertise in a way that fits your budget and your available time

- analyze the gift planning options you are using and ways of expanding those options to attract more gifts from more donors without burdening your internal resources
  - evaluate your institutional goals, policies, and procedures, with recommendations for expanding those policies, clarifying institutional positions and producing greater transparency to donors and institutional colleagues alike
  - focus on your expenditures, both of financial resources and of personnel time, with suggestions of ways to refocus those resources to produce an expanded gift planning function.
- Build a Mentoring Relationship:

As Karen Jackson suggests earlier in this publication, a consultant can provide on-going mentoring to your planned giving staff or even to the entire development office. By appearing on-site in a regular cycle (at least once a month), the consultant can guide the individual growth and confidence of the members of the staff who are responsible for the day-to-day management of the planned giving program. The role of the consultant should not be to take over planned giving, but rather to enable your staff to do planned giving better.

- Provide Guidance:

We all need a gentle nudge (or two) to stay focused on the important and not to get sidetracked by the urgent trivialities that crowd our days. Consultants (who have their own urgent trivialities, but who are not burdened by the urgencies on *your* to-do list) can help you maintain your priorities and complete the tasks that all have agreed are the keys to success. Consultants are the “benevolent nags” of our professional lives.

With the help of a good consultant who complements your own strengths and organizational personality, you will be able to enhance

gift planning within your institution, open your fund-raising potential in the broadest possible way, improve the communication with donors and institutional leadership about this critical area of fund-raising, demystify the technical character of gift planning, and, most important, increase the number and the value of the gifts to your organization. Real results, practical suggestions, and knowledgeable recommendations will be the end product.