

William F. Stockwell & Associates, LLC

FUND RAISING AND NON-PROFIT MANAGEMENT CONSULTANTS

AFP NORTHERN NEW ENGLAND

2017 FALL CONFERENCE

NOVEMBER 2, 2017

NEW CONSULTANTS' DIALOGUE

It is February 1984, An ambitious independent school development director with 13 years experience is sitting at a CASE Conference in Boston, similar to our gathering here today, independent consultant Barbara Snelling from Vermont walks into the noisy workshop auditorium and the lights go out. There is silence for a while then she challenges each participant:

Do a skills inventory, what are you good at. What marketable skill do you have that you can “sell”? Where do you want to be in 3-5 years. Strategic planning for life. Close your eyes and imagine the most beautiful, wonderful place on earth where you would just love to live and work as an independent consultant. How can you get there and actually make a living? Can you make the transition from paid staff to independent - work ethic, time management, temptations, cash flow, clients, marketing, entrepreneur, presenter, leader, volunteer.

That was me. I had been thinking of being on my own. I was ready. It changed my life.

I talked to my Dad about the conference, how to go about it.

He said:

“Visit people and ask them”.

“The most flattering thing you can do for a person is to ask their advice”.

“Ask for help”.

Since then I have had to deal with the following questions and issues in order to become successful:

CONTACTS AND NETWORKING

Key leaders in the field - contacts

Brochure

Mailings

Mailing Lists

Membership Directories, CASE, NEAHP, AFP, ACAAP, CONFR, Etc

Conference attendees

Exhibitor at conferences

Phone Books

Hand entered into Database

Charitable Solicitations Disks – website publications

Follow ups to responses – Phone call (Before answering machines)

Make appointments and visit – cold call for appointments in area

47 meetings in 1985 for Con

Economic downturn 1992 took full time DOD job Honed skills

1995 Restarted CON 142 Con appointments I'm here - use me!

WHO:

Identify your existing network. Other development professionals, CEOs, peers, Heads, Presidents, donors, key volunteers, people of power, people of wealth, Organizations in your area, groups you or your friends volunteer for.

WHAT:

What do the organizations you want to work with need? Ask them.

What solution or benefit can you provide?

What skills/experience do you bring to the table that you can offer an organization?

WHERE:

Define the geographic area or territory you can reasonably serve.

2 Hour Radius

WHEN:

How soon are you able to devote how much time to each organization?
Are you part time or full time? Is this supplementary consulting on the side or full time? Are you slowing down - looking to fill in till retirement or building a career?

WHY:

Why should anyone contract with you? Devise a Case statement to explain what you do and how you can help. A brochure is best.

HOW:

How will you do your consulting. How will you be compensated?
How do you start a business? How do you market your services?

BARRIERS:

It takes three years to establish a new business. Can you live for three years without income?
90% of all new businesses fail in the first year. (Don't burn any bridges)
Sole proprietor, partnership, corporation, limited liability company (LLC) ?
Office in home, rent space, location, Location, LOCATION, office equipment, costs, staff.
If staff - hours of state and federal paperwork and reporting deadlines.
Associates ? "Keep it simple - One person working with the client is the real joy." John Harper
Marketing, brochures, mailings, telemarketing, exhibiting, follow up, scheduling visits,
suspecting, prospecting, making proposals, closing the deal, contracts, payment, taxes, etc.
Fees: Hourly, Per diem, estimating, per contract fee, studies, campaigns, etc.
Who is already doing it here? Identify the "Competition" How are you unique/different?
Registration with your State - \$250 registration fee through the Maine Department of Professional & Financial Regulation -Charitable Solicitations.
Is a Bond required in your state to register.
Insurance
Professional fees, dues, subscriptions, advertising fees, sponsorship opportunities

RESOURCES:

SCORE/ACE business courses, Business plans, Free Mentors.
Small Business Administration (SBA) pamphlets
Secretary of State - Non-Profit Data - Charitable Solicitations
Professional Consultants of Maine

“An independent consultant must spend
1/3 of the time consulting,
1/3 of the time doing the paperwork/accounting required and
1/3 of the time marketing” Dick Weeks 1985

Books:

<i>Designs For Fund-Raising</i>	Si Seymour
<i>How to Hire the Right Fund Raising Consultant</i>	Arthur D. Raybin
<i>The Board Members Guide to Fund Raising</i>	Fisher Howe
<i>The Consultant's Kit</i>	Dr. Jeffrey L Lant
<i>The Country Consultant</i>	Brian R. Smith
<i>Capital Campaigns</i>	Andrea Kihlstedt
<i>The Seven Faces of Philanthropy</i>	Prince and File
<i>It's Not About the Money -The Fundraising Feasibility Study</i>	Martin Novom

Professional :

AFP/NNE, CASE, SMDOG. CONFR, NEAHP, Maine
Association of Non-Profits, Maine Philanthropy Center, NH
Association of Non-Profits, etc.

Conferences:

Be a conference pack rat. If you see a good idea - use it.

Pro-Buono: Be a volunteer solicitor for something you care deeply about
so you know how it feels on the “other side”.
But “ don't give away what you sell”

ON: Training to be a consultant: Tim Scott “Go to work for one”

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