

The Role of Professional Counsel in a Capital Campaign

The role of KMA Consultants Inc. during a Capital Campaign usually includes part or all of five major sets of responsibilities. These responsibilities would be assumed only in the context of significant collaboration with key leadership of the client.

At all times KMA Consultants Inc. serve as the "insistent voice" to see that a successful plan of Campaign is followed, including the general principles of major gift fund-raising, and specific policies, procedures and strategies established for the Campaign. KMA, however, ultimately does not dictate policy or procedure. All decisions ultimately rest with the client organization

1. *Structure & Overall Strategy:* KMA Consultants Inc. will provide the professional expertise to devise an effective structure and strategy for conduct of a Capital Campaign. KMA is the chief *strategist*.
2. *Staffing & Procedures:* KMA Consultants Inc. will advise on staffing and operating procedures and policies for the Campaign office. KMA is the *resource* for operational design.
3. *Execution:* KMA Consultants Inc. will consult on all aspects of the Campaign, maintaining regular contact with Campaign office staff and leadership, and leadership of the organization. KMA is available at all times by telephone, e-mail etc, and is the *arms-length supervisor* of the process. (Note: depending on specific needs and capacities of the client organization, KMA's role can vary, from occasional consulting as requested, to scheduled consulting for the duration of a campaign, to campaign supervision, to direct campaign management, even to the extent of placing staff on site.)
4. *Training:* KMA Consultants Inc. will train and advise the leadership as necessary in all aspects of the Campaign, including training those who will train others to make calls. KMA is the *coach* for the lead volunteers, acquainting them with proven methods, techniques and procedures.



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5. *Communications*: KMA Consultants Incorporated will consult on the key marketing communication tools for the Campaign. KMA is the *communications specialist* assisting the Campaign office and leadership. (Note: If the client has established relationships with suppliers for design and printing, KMA will work with those suppliers. Otherwise KMA can supply all related services).

The professional counsel *does not* solicit funds. This function is carried out entirely by volunteers, assisted by the organization's leadership and staff.

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