

Nonprofit Consultants-How to Choose Them and Work with Them!

(Adapted from the Center for Nonprofit Management *Nonprofit Consultants: How to Choose Them How to Use Them* booklet, Southern California Center for Nonprofit Management, October 1998.)

As you consider hiring and working with an external consultant with the grant you receive from the Greater New Orleans Foundation's Organizational Effectiveness grant program or any other resources your organization may use, here are key things to keep in mind.

Consultants can offer many things and can bring much to your organization:

- *An Outside Perspective*—they can bring an objective eye to a project and can remain neutral
- *Content Expertise*—in board governance, planning, strategic communications or evaluation, and can bring a focus and skills-building approach as they work with your board & staff
- *Process Experience*—they know how to help move your organization from where it is now to an improved state
- *Breadth of Experience*—and can help you navigate the setbacks, learning curves, and use tools for a successful learning outcome

There are many times to use an outside consultant—when you need to upgrade your staff and board skills around a particular issue, when you have a problem that requires consensus and cooperation among key internal stakeholders, and when you need someone to facilitate an important meeting for your organization.

However, there are times when you should not hire a consultant. They include:

- When your board or executive director doesn't support the project
- You don't know what you want or need the consultant to do
- You can't commit additional resources to the effort
- You are looking for a scapegoat on an issue facing the organization
- You are in need of additional staff

Here is a suggested, streamlined process for Small Projects that might not need a formal Request for Proposal (RFP):

- ✓ Determine what your issue, problem, or challenge is and what you need from a consultant
- ✓ Gather at least three recommendations from colleagues, funders, your past experience, intermediaries, etc.
- ✓ Contact each consultant and describe your needs, including your timeline and budget constraints. Explore their experience with similar projects, how they approach their work, and their availability vis a vis your timeline
- ✓ If you believe this consultant is a good fit with your needs, follow up with a request for a brief, two to three page proposal recapping the statement of need, what they will do to meet your needs, with outcomes and deliverables (a scope of work), a timeline to conduct the work, and any fees & expenses along with a billing schedule for payment and references
- ✓ Review the two to three proposals received for: their problem solving approach, expertise, time frame and clarity of deliverables, and scope of work to ensure the costs are in line with your budgetary constraints. If desired, conduct a face to face interview. Contact references
- ✓ Determine the best fit for your organization, your needs, and the consultants approach

- ✓ Hire your consultant with a written contract/agreement

Questions to ask prospective consultants when interviewing them via phone or face to face:

1. For whom have you worked before and what sorts of similar projects have you undertaken?
2. What were your accomplishments with those projects? What changed in the organization because of your efforts with them?
3. Explain how you work with clients.
4. Why do you think hiring a consultant would address the need, problem, challenge facing our organization? What tools, approaches, and processes might you offer us?

It's important to create the conditions for the engagement to go well once you've engaged a consultant.

A few things to pay attention to:

- Prepare your staff and/or board for working with a consultant—spend time with them before the consultant begins work explaining what will be going on and what their roles will be.
- Clarify the role and authority of the consultant. Make clear who the consultant reports to for this engagement.
- Organization must take responsibility for the project and not depend solely on the outside consultant. The intent of working with a consultant is to build your staff and board capacities and your organization's effectiveness.
- Stick to the scope and terms of your contract/working agreement. Only undertake one project at a time and if the need for additional work arises, treat that as a separate piece of work and address after the scope of the initial work is completed.

Last but not least, make the changes that the work calls for. At the end of the day, it is the staff and board who are responsible for implementing new practices, new approaches and tools, and fully embracing them. Take action and reap the results!