WORKING WITH A CONSULTANT

When you've got a big project – such as a marketing, fundraising or evaluation project – working with a consultant can be invaluable. The consultant can bring fresh ideas, a new perspective, a sense of objectivity, as well as provide the needed focus to keep a project moving forward.

Deciding whether to hire a consultant is an important decision for any organization, and you should ask yourself these questions:

- Does the project require the kind of objectivity that a consultant can bring?
- Do we have the in-house expertise and people power to get this done without a consultant?
- Can our budget support hiring a consultant?
- Who will work most directly with the consultant to shape the work to be done?
- To whom will the consultant report?
- How will we find a qualified consultant?

STARTING THE SEARCH

Once you have answered these questions and determined your organization will benefit from working with a consultant, you'll need to find the right one. Here is a process you can use to start the search:

- ***Create an RFP (Request for Proposals)*** - Create a written document that you can circulate to consultants to give them a picture of your organization and the kind of work or project you have. This lets the consultant know who you are, the scope of the work, and the skill sets you are seeking. This document can range anywhere from one page to twenty, but even for the short RFP, it's a great exercise to put in writing exactly what you hope to accomplish. Circulate this to as many consultants and organizations which work with consultants as you know.
- Once the responses to the RFP arrive, ***Convene the Decision Makers*** to select those consultants you'd like to talk with in more depth.
- Set up a ***Brief Phone Interview*** with those consultants you're interested in. It's best to talk with at least 2 or 3 different consultants to get a feel for their style and approach to your project. Once you've selected your finalists, set up a face-to-face interview. Chemistry is key here – you want to be sure that the consultant you hire is someone you will enjoy working with, and someone with whom you can communicate easily. If you don't feel you're speaking the same language, the relationship will likely not work well.

Interviews

Here are some questions you can use during an interview:

- What are your ***areas of expertise?*** (i.e., strategic planning, board development, fundraising, etc.) Have you worked on projects that are similar to this? What did you learn from these projects?
- Can you describe how you like to ***communicate with clients*** during a project? (i.e., regular meetings, email updates, telephone conferences, etc.) What type of reports will we receive from you?
- What are your ***expectations of our board/staff's involvement*** in this process? What can we expect from you? What do you require of us?
- How would you ***describe the way you go about a job?*** Has there been a job you can describe that did not go well and can you talk about why?
- What is your ***fee structure?*** Is it hourly or project based? What is included? (Travel, photocopying?) Will there be a rate breakdown by task and an allocation of the number of hours per task?
- What is your ***project workload at present?*** How would our project fit in? What is your estimate of how long will it take to complete our project?
- Tell me about your ***experience in working with nonprofits in New Hampshire?*** Can you give references, including the type of projects and outcomes you provided? Can you provide samples of your work?

Once you have selected which consultant you'll be working with, establish a clear set of communication expectations and a point of contact within the organization who will work with the consultant to set direction, be available for feedback and review the consultant's work in progress.

Building and Maintaining the Working Relationship

One of the chief reasons that projects go awry is poor communication. Perhaps the consultant is not getting enough direction from the organization to adequately structure the project. Or the organization may feel they are not getting enough input from the consultant before s/he starts working on a project, with the clock running. Scheduling regular progress check-ins and written reports can help to keep both the project – and the budget – on track.

Here are some tips for building and maintaining a strong working relationship with the consultant you hire:

- Agree upon ***a written work plan*** for the project, which can serve as the blueprint for the consultant's work. It may take extra time in the beginning but can help to keep the project on track.

- ***Communicate regularly*** with the consultant to review timetables and responsibilities.
- Be clear about ***what written reports you would like and when***. Do you want progress reports? Quarterly updates? A final report or plan? These reports may add to the cost of the overall project but can serve as clear guideposts for tracking progress.
- If you're unclear, or not pleased with the work in progress, ***ask for a meeting to address the situation*** as soon as possible. Open communication – even difficult conversations – is the only way through. Raise questions and concerns promptly so they can be addressed. Sometimes problems can arise from misunderstandings, which can be cleared up through dialogue. Remember - poor communication can often de-rail these projects, so if something is nagging at you, don't delay.
- Establish at the front end the ***payment expectations*** – both the amount and timing. When invoices arrive, pay them promptly.
- Hold ***a final debriefing to discuss the results*** of the project, and what was learned. Provide feedback to each other about not only the results of the project, but the process as well – what worked well and what didn't. You can both learn from that.
- Above all, ***keep the communication flowing*** and the expectations clear on both sides. Check in regularly on the progress of the project and make mid-course corrections as needed.

Consultants can be an important part of the plan when moving big projects forward, and when things work well, can be worth their weight in gold.

Request for Proposal Checklist

- ***Background of the organization:*** Give a brief history of the organization and explain why it is undertaking this work now.
- ***Purpose:*** Describe the purpose of hiring the consultant and the background of the project. Give a brief description of the work you're looking for a consult to do (i.e., conduct a feasibility study, facilitate a planning retreat, develop a fundraising plan). Describe any specific outcomes or activities you're looking for and mention how this work will be used, if pertinent.
- ***Deliverables:*** Give a clear list of the tasks and work products you will expect from the consultant at the completion of the project (i.e., reports, surveys, plans, etc.). and describe the specifics of what you want included. Also include any interim progress reports or meetings you expect during the project.
- ***Qualifications:*** Describe the qualifications needed to complete the work successfully (i.e., strong financial background, tech savvy, fluency in Spanish, etc.)
- ***Form of proposal:*** Describe the format of responses to the RFP. If you require certain documents (i.e., Organizational charts of applicants' organization, resumes, etc.) list that here.

- ***Interview:*** Clarify if you will require an interview and whether a phone interview will suffice.
- ***Term of contract:*** Discuss the length of time the contract will cover. If you have a final deadline by which work must be completed, list that here.
- ***References:*** If you require references, specify the number you require and the format in which you would like to receive those references. Is there a standard form to be filled out? Will you be contacting these references by phone?
- ***Pricing:*** Specify how you would like cost information presented. Will you allow for project costs (travel, out of pocket expense) or do you expect an all-inclusive price? Are you looking for an hourly, daily or project rate?
- ***Questions:*** Give details on whom to contact if there are questions about the RFP – both phone and email.
- ***How to respond:*** List the mechanism for response. Do you want the proposal emailed? Sent through the US Mail? Is so, how may copies? Do you have prohibitions against stapling or sending with a cover?
- ***Important dates:*** List key dates for the project so they are clear to the responder.