

The Do's and Don'ts of Hiring a Consultant

Are you challenged by all of the tasks and demands placed on your organization? Nonprofits are often expected to do it all and do it well with limited resources. So when and how do you seek outside help? *What are the Do's and Don'ts* of hiring a consultant?

When is a consultant helpful?

While there are many ways a consultant can help your organization, perhaps the most important is to assist your group's stakeholders to define your mission and build your capacity to achieve strategic impact. Organizations can always benefit from an outsider's perspective and experience. For example, a consultant can help if you are:

- Defining new goals.
- Upgrading information technology or financial systems.
- Implementing a leadership development or skills training initiative either at the board or staff level.
- Conducting a program or needs assessment.
- Conducting an outcome measurement evaluation.
- Seeking coaching services for the executive director, management team or board.

What can you reasonably expect from a consultant?

The keys to a successful consultant engagement are *trust and communication*. The consultant should become thoroughly familiar with your organization's situation and suggest practical recommendations or alternatives. Cultural insensitivity or an inability to speak in lay language can indicate a potentially incompatible relationship.

Your organization should expect that the consultant will:

- Maintain confidentiality regarding all aspects of the services being provided.
- Plan and carry out the work in a professional and timely manner.
- Account for use of time and expenses clearly.
- Assist the client in obtaining professional help for aspects of the project outside of her/his area of expertise.
- Avoid and/or inform all parties of any potential conflicts of interest.
- Conclude a consulting relationship when it is reasonably clear that the client is no longer benefiting from the arrangement.

Let's now look at what an organization should do before hiring a consultant.

What should your organization do to prepare itself?

Be sure that all segments of your organization see the need and usefulness of hiring a consultant. Resistance from any one sector can be an obstacle to completing a rewarding engagement. Therefore it is important to address any organizational concerns or barriers before agreeing to a contract.

Here are some more basic guidelines you can apply when preparing to hire a consultant.

Do

- Interview more than one candidate.
- Check references.
- Ask for a complete scope of service, timeline and budget.
- Develop a detailed and outcome oriented contract.
- Conduct a thorough organizational orientation for the consultant.

Don't

- Hire a consultant to perform staff or board duties.
- Expect a consultant to provide "quick fixes."

Keep in mind that the purpose of having a consultant is to build organizational capacity. Consequently, the consultation is only effective if it is perceived by organizational members as needed and helpful; they should feel a sense of ownership that translates into follow-through.

This leads us to discussing the fundamentals to achieving a successful engagement.

Basic Elements for a Successful Engagement

In addition to having a shared understanding of the need and usefulness of a consultant, *both parties* must also agree to the amount of time and resources needed to complete the assignment and achieve the desired outcomes. For many nonprofits with stretched resources, placing an increased demand on either the board or staff's time will undoubtedly produce discord. Yet oftentimes, additional time is required from board and staff even when a consultant is hired, especially for projects like strategic planning, assessments and outcome evaluations. Therefore, great care must be taken by both parties to design a process that is reasonable, flexible and doable.

Simple steps can be taken to ensure a successful engagement:

- Develop a team approach where the consultant works with the organization's members to design and coordinate the project.
- Clarify expectations among board and staff before designing a process. Establish areas of consensus and reconcile differences *at the very beginning*.

- Maintain an open, fully participatory process.
- Build agreement around the mission, vision and goals of the organization by allowing for the generation of new ideas and learning.
- Anticipate that change will occur and lay the groundwork for the organization to embrace it.

Remember that you must first reach agreement on the need and usefulness of the consultation if you hope to promote a process that is achievable and effective. Secondly, *trust and open communication* are central to a successful consultation. Finally, with the goals and measurable outcomes fully defined you can move forward confidently towards building organizational capacity and achieving strategic impact.

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