



How to Hire a Consultant

There comes a time in the life cycle of almost every nonprofit organization when problems arise or people in the organization realize they need skills they don't have. This is when they are likely to seek technical assistance: help from a consultant someone outside the group to provide the skills and information needed.

While consultants are sometimes hired to do work that would generally be done by staff (e.g. write funding proposals or do accounting), the purpose of hiring a consultant for technical assistance is to get their coaching and teaching. The goal is to strengthen the group's capacity to do things for themselves after the consultant finishes working with them develop better skills and a clearer understanding of what needs to be done.

Before you begin looking for a consultant, you need to define your organization's needs as much as possible. This process really should involve the whole organization and not just the executive director. When the board of directors as well as the staff recognizes a need, there is greater likelihood that everyone in the organization will become involved in addressing the problem.

FINDING POSSIBLE CONSULTANTS

The Dyson Foundation can suggest possible consultants or training events but you may also want to identify some possibilities on your own. Some places to consult are:

- People working in other local nonprofit groups
- Members of your board of directors
- Funders
- Nearby universities or colleges (some have evening or non-credit programs on nonprofit management topics)
- Local affiliates of national organizations (e.g., National Society of Fund Raising Executives, Accountants for the Public Interest, National Center for Nonprofit Boards)
- The classified sections of nonprofit management assistance (e.g., The Chronicle of Philanthropy, The NonProfit Times)

You may choose to attend an existing training event that is open to the public (e.g., a university's continuing education course or a Grantsmanship Center workshop that will take place in your area), or you may decide to work with a consultant on a one-to-one basis on your organization's specific needs. The advantage of attending a public training event is the relatively low cost; the disadvantage is that it is geared toward a very diverse audience. The advantages of working with a consultant are that the assistance is specifically oriented to your organization's particular needs and culture, and you can arrange the timing of it to suit your group's convenience. The down side is that this type of assistance is more expensive since you aren't sharing the cost with participants from other organizations.

If you decide to work one-to-one with a consultant, you want to be sure to hire someone who can do the job right. Specifically, look for these qualities:

- **SKILL:** Most consultants develop skills in a couple of specialty areas, e.g., fundraising and board development. Make sure that the individual you select has expertise in the area(s) where you need assistance.
- **SENSITIVITY:** Ideally, you want someone who shares your overall values and whose goal is to build your group's capacity. If a person does not have direct experience with the special conditions or culture of your organization, make sure he or she is sensitive to these things.
- **TRACK RECORD:** Talk with other groups who have worked with this person; i.e., check references. Make sure that the consultant has the experience to accomplish the goals you have set out for your organization.
- **INDEPENDENCE:** The consultant should be a professional and outside of your organization (not on your staff, board, or advisory board) to provide a neutral and objective voice.

SELECTING THE RIGHT CONSULTANT

Once you have identified a few possible consultants, try to meet with each of them to describe your needs, answer the consultant's questions, and get a sense of how he or she would try to help you. Most consultants will not charge for this initial meeting, and you can learn a lot from it. It can help you further define what you are looking for and give you a good sense of how you might work with the individual. Specifically, you will want to reach agreement with a consultant on a number of areas before your work together begins:

- **THE PROBLEM:** Clearly stated, what problem(s) will be addressed in your work with the consultant?
- **THE OBJECTIVE:** What, precisely, will be achieved as a result of the consultation?
- **THE METHOD:** How will you and the consultant work together to achieve your stated objective? Will there be regular meetings or phone calls? Where, and who will participate?
- **RESOURCES REQUIRED:** What people, money, and other resources (supplies, equipment, meeting space, etc.) will be required to do what you need to do?

Based on your discussion, ask the consultant to develop a written proposal that clearly addresses these points in writing. Ideally, you too should spell out your understanding of these points in writing so that you can (1) be clear on them and (2) compare your own understanding with that of each consultant you consider.

Get written proposals from at least two or three consultants so that you have a basis for comparison. Be aware, however, that you do not have to accept any of the proposals you get as it is written. You can and should negotiate for what you need at a price you can afford. (Remember that the Dyson Foundation Mini-Grant Program may be able to provide a subsidy to help you pay for assistance.) If something in a proposal is unclear, ask for greater clarity. You must understand the terms of the contract as well as the consultant does.

HIRING THE CONSULTANT AND WORKING TOGETHER

Ultimately, you will choose one consultant and enter a written contract with that person. At this point, you should call the others who developed proposals for you to let them know you have decided to work with someone else. This basic courtesy will help you maintain a good relationship with them, which will serve you well if you need to call on them for other technical assistance in the future.

Because you and your consultant will have invested the time in reaching agreement on the problem, objective, method and resources required, you will now be in an excellent position to work as partners toward a clear objective, and the time you spend together is bound to be used productively. Besides clarity, though, there are other ingredients that are essential to a good working relationship with a consultant:

- **Honesty** You must be honest about the situation in your organization, even the personal shortcomings that may be uncomfortable to verbalize. Candid discussion is essential to defining the problems correctly and addressing them effectively. Of course, the consultant also must be honest with you, which will require your...
- **Open-Mindedness** Sometimes a consultant may recommend things that you don't want to hear. It makes little sense to pay a consultant for guidance, though, unless you are receptive to hearing what you may have to do to solve the problem. Consciously make an effort to be open-minded to change.
- **Commitment** The entire organization needs to be committed to making the technical assistance work: the staff, board, volunteer leaders, everyone. This means setting aside the time needed for meetings, preparing materials in advance if this is called for, and always keeping the objective in mind. Most of all, it means acting on the consultant's recommendations. The best advice will not help your organization if you don't use it!

If these guidelines are followed, you are likely to have a valuable, productive relationship with your consultant. Even more important, your organization can build its capacity so that, when you finish working with the consultant, you are all better skilled to do the organization's work effectively. Ultimately, our communities will benefit because your organization will be strong and well-managed enough to survive and thrive as you carry out your important work.

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NATIONAL ORGANIZATIONS WITH LOCAL AFFILIATES

National Society of Fund Raising Executives

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Accountants for the Public Interest

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