



## **How to Hire a Consultant**

There comes a time in the life cycle of almost every nonprofit organization when issues or opportunities arise or people in the organization realize they need to gain or hone certain skills. This is when they are likely to seek technical assistance: help from a consultant, who serves as an outside, objective resource to build the skills and provide needed information and guidance.

While consultants are sometimes hired to do work that would generally be done by staff (e.g. write funding proposals or provide accounting services), the purpose of hiring a consultant for technical assistance is to access their expertise through coaching, teaching, and facilitation. The goal is to strengthen individual knowledge and skills, thereby increasing the group's capacity to do things for themselves after the consultant finishes working with them.

Before you begin looking for a consultant, you will need to define and prioritize your organization's needs as much as possible. This process should include the participation of appropriate staff and board members 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 engaged in addressing it.

### **FINDING POSSIBLE CONSULTANTS**

Though the Dyson Foundation does not vet or recommend consultants, we can sometimes provide suggestions for organizations to consider. You may also identify possibilities by speaking with:

- People working in other local nonprofit organizations
- 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., Association of Fundraising Professionals, BoardSource)

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 Foundation Center workshop that will take place in your area), or you may decide to work with a consultant on a one-to-one basis to focus on your organization's specific needs. One advantage of attending a public training event is the relatively low cost; a disadvantage is that it is geared toward a very diverse audience. The advantage of working with a consultant are that the assistance is tailored to your organization's specific needs and culture, and you can arrange the timing of it to suit

your convenience. A 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 approach the consultancy. 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 few areas before your work together begins:

- **The Issue:** Clearly stated, what issue(s) will be addressed in your work with the consultant?
- **The Objective:** What, precisely, will be achieved as a result of the consultation? What deliverables will be produced?
- **The Method:** How will you and the consultant work together to achieve your stated objective? Will there be regular meetings or phone calls? Where will meetings be held and who will participate?
- **Resources Required:** What people, money, and other resources (time, 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. 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.

Obtain 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 receive as written. You can and should negotiate for what you need at a price you can afford (within reason based upon the project scope). Remember that the Dyson Foundation's

Management Assistance Program may be able to provide a grant to help your organization 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 prior to executing a contract.

## **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 contact 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 issues correctly and addressing them effectively. Of course, the consultant also must be honest with you, which will require –
- **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 address the issue(s). 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 communicating promptly, 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! Implementation is key.

If these guidelines are followed, your organization is likely to have a valuable, productive relationship with the consultant. Even more important, your organization can build its capacity so that, when the project is completed, everyone involved will be 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 the important work.

Special thanks to the Environmental Support Center which developed the outline of this document. Used by permission.

**Please review the Dyson Foundation's Management Assistance Program criteria [here](#). Please contact a [program officer](#) for additional information.**