

COMMUNITY FOUNDATION for MONTEREY COUNTY
Center for Nonprofit Excellence

Working Effectively with Consultants
Basic Guidelines

What are Consultants?

Consultants are professionals with expertise in specific fields who can provide information, advice, perspective, tools, and skills to enhance an organization's effectiveness, address a problem or fill a need.

When to Hire a Consultant

Organizations usually consider contacting a consultant if they:

- * Have a specific task to accomplish for which staff lack time or expertise to undertake on their own
- * Have a problem (or symptoms) which they do not fully understand or for which they cannot find a workable solution
- * Need assistance to implement solutions or to motivate staff or Board members to take action

What Consultants Do

Guide in diagnosing, evaluating and solving problems

Engage Board and staff in ongoing conversation about goals, plans and change

Provide tools and perspectives to enable Board and staff to evaluate and identify directions and initiate change

What Consultants Should Not Do

Take on essential staff or Board responsibilities

Do all the work alone

Change the organization's basic values

Consulting Services Commonly Used by Non-Profit Organizations

- * Research, including feasibility studies
- * Analysis, diagnosis and assessment
- * Training
- * Problem solving
- * Facilitation
- * Systems development
- * Organizational development
- * Administrative processes
- * Long range and/or strategic planning
- * Fund development including capital campaigns
- * Board development
- * Marketing and publicity

Guidelines for Interviewing and Selecting a Consultant

1. Interview and evaluate more than one consultant with expertise in the service needed by your organization
2. Ask them to describe their work process
3. Ask for information about other projects on which they have consulted and their accomplishments
4. Check references (!)
5. Provide the consultants with information about your organization that will enable them to understand your organization's goals, operation and needs
6. Request a proposal and detailed workplan that includes:
 - a) A summary of their understanding of the issues to be addressed
 - b) A project management plan
 - c) The objectives to be accomplished
 - d) A list of tasks to be undertaken with a timeline
 - e) A description of the approach and methodology
 - f) A list of resources and staff required to accomplish tasks (who, how much time, in what capacity)
 - g) A description of the final product
 - h) The proposed project budget
7. Enter into a written agreement or contract that defines:
 - A. The final workplan for the project
 - B. Official staff and/or Board contact persons
 - C. Beginning and completion dates
 - D. Service fees, payment method and payment schedule
 - E. Progress review process and schedule
 - F. Termination procedures
 - G. Means of resolving disputes
 - H. Process for changing terms and parties authorized to approve changes

Evaluating the Work of a Consultant

Effective consultants demonstrate skill, sensitivity and experience in the fulfillment of their contract and their relationship with their clients. Effective consultants:

- * Grasp the needs of your organization and its underlying problems
- * Complete the work on time, on schedule, and within budget
- * Negotiate changes to the workplan according to the terms of the agreement
- * Work at an appropriate pace
- * Have a positive impact on Board and staff
- * Treat staff and Board members with respect and professionalism; earn the respect of staff and Board members
- * Deliver a final product that meets the terms of the agreement
- * Help the organization build skills and knowledge to more effectively deal with similar issues in the future

Where to call for referral to qualified consultants?

In Monterey and San Benito Counties, call or write to the following organizations, or check the listed Web sites.

- * Community Foundation for Monterey County: susiep@cfmco.org (831-375-9712)
- * Association of Fundraising Professionals: <http://www.afpnet.org/>
- * Development Executives Network – www.developmentexecutivesnetwork.org

To: Our nonprofit friends

From: The Central Coast Consultants Group (contact: nancy@augmentdirect.com)

If you are planning to hire a consultant — and planning to solicit proposals from more than one consultant, we suggest you adapt the following format to fit your specific situation. The result: all consultants will present the information you need in a consistent format, and it should be easier for you to select the ones you want to interview and hire.

TEMPLATE FOR REQUEST FOR PROPOSAL (RFP)

- 1) Mission and brief description of organization -- include: organization's budget, staff and board size, and key accomplishments
- 2) Situation
 - a. Key issues facing organization
 - b. Statement of what your organization needs
 - c. How it was determined to hire a consultant
- 3) Nature & Scope of the Project
 - a. Expected outcomes with rationale
 - b. Who in the organization will be involved? How many people will the consultant work with/report to? Who is the liaison? Who will supervise the consultant's work?
 - c. Reporting/presentation requirements
- 4) Timing of the Project — proposed start and end dates
- 5) Budget - dollar range or maximum allocated for this project - how the organization will fund the consultation and the rest of the project
- 6) How to submit a proposal
 - a. Deadline (should be at least 3 weeks from RFP distribution date)
 - b. Contact person at organization who can discuss project
 - c. Number & types of references to provide
- 7) Information to be included in the consultant's proposal
 - a. Scope of Work
 - a-1. Description of approach to project
 - a-2. Work plan and timeline
 - a-3. Deliverables
 - b. Consulting fees/other costs
 - c. Consultant firm information
 - c-1. Background & qualification
 - c-2. Similar projects
 - c-3. References
 - c-4. Names & qualifications of consultants who will perform the work