Getting the Most Out of Your Consulting Engagement

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Nonprofit Support Program Workshop
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Why Hire a Consultant?

To support your organization’s ability to reach its goals with resources you do not otherwise have inside the organization.

Consultants* can be....

• An extra *pair-of-hands* when an organization knows how to carry out a task, but is temporarily short-staffed.

• An *expert* in a particular subject matter to provide knowledge and skills that the organization does not have.

• A facilitator in a *collaborative* role to work in partnership with the organization to provide an outside perspective needed to solve a problem or develop a future plan.

* Role of a consultant as defined in Peter Block’s *Flawless Consulting*
Critical Success Factors

- Clarity of Purpose
- Communication
- Chemistry
- Collaboration
- Capacity Building
Clarify Your Project

• What is the underlying challenge or opportunity to be addressed?
• What kind of project do you have in mind?
• How would you define success? Outcomes? Deliverables? Products?
• What role(s) do you think are best suited for a consultant in this project?
• Are there secondary objectives or capacity building goals?
Determine Your Process

- Who “owns” the project?
- Who will be involved in hiring the consultant?
- Who does the consultant work for?
- Who is the consultant accountable to?
- What is the right balance of process for your organization?
- What are the potential obstacles and how will these be mitigated?
Recruiting Consultants

- Decide the recruitment process
- Describe your project in writing
  - Background, issues to address, project goals, anticipated outcomes, consultant deliverables
  - Define what you are looking for from a consultant
  - Provide scale and budget parameters if possible
- Tell prospective consultants how to apply
  - What you want in writing
  - Timeline
- Call consultants you are interested in considering
Generating a List of Names

To build a list of potential consultants, talk to....

✓ Your peers – Executive Directors, Staff, and Board members
✓ Foundation staff
✓ Other intermediaries
✓ Consultants you have already worked with on other projects
Making the Match

- Set evaluation criteria
- Interview consultants
- Check reference
- Evaluate candidates
- Make a final decision
Evaluating Proposals

- Relevant expertise
- Experience
- Proposal clarity and specification
- Appropriateness to your project
- Personal style
- Cost
- Availability
- Other considerations
Interviewing Consultants

- Staff, board, stakeholder participation
- Interview facilitator
- Format
- Consistent questions
- Note taking
- Evaluating responses
Types of Interview Questions

• Engagement *specific skills*
• *Universal* consulting skills
• *Consultant understanding* of your specific organization and project
• Proposed *scope of work* follow-up questions
• Reaction to *hypothetical situations*
• *Examples* of similar projects led by the consultant
• *Affordability* and *availability*
• Questions the candidate has for you
Evaluating Interviews

Does the consultant....

- **Listen** well?
- **Communicate** clearly?
- Show everyone in the room **respect**?
- **Analyze** information appropriately?
- Show a balance of **confidence, humility, and self-awareness**?
- Appear to **understand your organization** and its needs?
- Ask **insightful** questions?
- Demonstrate **flexibility**?
- Really **get it** and **get you**?
Check References

• Call references provided by the consultant
• Call other people you know
• Verify the basics
• Ask consistent questions
• Listen for “tone” and “background noise”
Structuring the Engagement

• First – a compact...
  • Clear view of objectives
  • Scope of work
  • Roles
  • Deliverables
  • Communication style and frequency
  • Project manager
  • Timeline
  • Workplan
  • Payment structure and schedule
  • Other conditions
Contracts

*Codifies your compact*

- Letter of Understanding
- Standard Contract and Workplan
- Formal Agreement/Contract
Getting Started

- Conduct an orientation (in person if possible)
- Provide useful written materials
- Describe markets you serve, services you provide
- The inside story
  - Challenges, issues, opportunities you face
  - Key players inside and outside the organization
  - Organizational culture
  - Key phrases and terms
  - Reiterate confidentiality
Managing the Work

- Participate actively
- Be proactive
- Communicate – open, timely, honestly
- Hold the consultant accountable
- Keep other stakeholders informed
- Be flexible and adjust the scope as needed
- Provide feedback to the consultant as the project unfolds
- Review invoices and pay on time
Trouble-Shooting

• Clarify and *articulate concerns*
  • Speed or rate of progress?
  • Lacking skills?
  • Communication issues or style?
  • Invoice or billing?
  • Personality conflict?
  • Overall effectiveness?

• *Collaborate on problem solving*, project adjustments

• Talk with *trusted advisors* (inside or outside the organization)

• Consider *alternatives or termination*
Finishing Up and Evaluation

- Check the workplan/contract for *deliverables*
- Make final *payments*
- *Final reports*, documents due from the consultant
- *De-brief* or final meetings
- *Evaluate* the project
- Provide final *feedback to the consultant*
- *Follow-up support* from the consultant or from someone else
- Next steps in *capacity building* for your organization