

**COMMUNITY FOUNDATION for MONTEREY COUNTY
MANAGEMENT ASSISTANCE PROGRAM**
2354 Garden Rd., Monterey CA 93940
(831) 375-9712

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 (831-375-9712)
- * CompassPoint/Consultants ONTAP - <http://www.ontap.org>
- * Association of Fundraising Professionals: www.afp.net
- * Development Executives Network – www.developmentexecutivesnetwork.org