

Working with Consultants

FAQs for Grantees

1. WHAT DO CONSULTANTS DO?

A consultant can offer advice, perspective, tools, inspiration, skills, and time, to help solve problems. The best consultants also help their clients gain the courage to plan, decide, and act. Consultants can provide specialized services such as audits, IT, communications and/or executive search. They can also help plan, develop programs, evaluate, and assess. Some consultants bring process expertise (e.g. facilitation or scenario planning). Others are content or technical specialists.

2. HOW DO I FIND A CONSULTANT?

There are many consultants to choose from no matter the task. The best advice about consultants will often come from another nonprofit that used consultants successfully for a similar project. In any event, always interview more than one consultant before making a commitment and thoroughly check references. *(Note: An RFQ – Request for Qualifications – can help you narrow the field before you ask for full proposals. RFQs are also less work for the consultant than an RFP and a great way to get basic information about consultant capabilities.)*

3. HOW DO I SELECT THE RIGHT CONSULTANT FOR MY PROJECT?

There are trade-offs to consider. It can be comfortable to hire a consultant you've worked with before, and it does shorten the amount of time and effort required to bring them up to speed on your organization and the context for your work. On the other hand, familiarity is not enough. Your chosen consultant should have the basic skills and expertise as well as a track record in doing the work you need done. The fact that they performed well on another engagement is no guarantee if you're asking them to do work in an area or manner where they have little or no prior experience.

4. WHAT MAKES A GOOD CONSULTANT?

The best consultants have relevant skills and experience. They have strong references. They are good listeners and creative thinkers. They are also well-organized as well as focused on deadlines and deliverables.

5. WHAT MAKES A GOOD CLIENT?

A good client will (1) define the project and the goals clearly; (2) make the commitment to work closely with their consultant throughout; and (3) be curious and open to learning.

6. WHAT MAKES FOR A GOOD CONSULTING ENGAGEMENT?

In a word: clarity. Get clear on why you need a consultant. Then define a clear work plan including objectives, approach, tasks, timing, work products, payment schedules, and means of resolving disputes. The project may need to change over time, but starting out with a clear set of goals and a plan will make it easier to understand and adjust to needed changes along the way.

The consultant and the client also need good chemistry. You and your consultant are a team. You may find that you are working very closely together for many months. It helps to like and respect each other.

7. IS IT BETTER TO HIRE A SOLO PRACTITIONER, A SMALL FIRM, OR A BIG FIRM?

It depends on the project. In any case, the consultant or the team should have experience with projects of comparable scope. Consider the full range of capacities needed to carry out the work when searching for the right consultant. (Do you expect a simple report-out of findings, or do you also want a professionally edited, designed, and published product? Will you need visuals? Infographics? Illustrations or maps? Do you need a single highly qualified consultant or a team including multiple specialties and levels?)

If working with an individual or very small firm, ask about how your project fits in with other projects they are currently managing and any implications this might have for your project timeline. If working with a large firm, the project should be significant enough, in comparison with their other work, so that it will matter to them to create a good relationship.

Whether working with a large firm or a solo practitioner, consider including a provision in the contract that any change in the project or team leadership requires prior approval and periodic briefings by the project leader. And remember the old adage: “You get what you pay for.” Price, although always a factor, should not take precedence over skills, expertise and a proven track record.

8. IF I FIND TWO FIRMS I LIKE, CAN I ASK THEM TO WORK TOGETHER?

It may be tempting, but forcing two consultants or firms to work together, especially if they don't have an existing affiliation, is problematic. The consultant-client relationship is already complex. Hiring two firms for a job will likely slow down the work because of the need for additional coordination. This will in turn drive the costs up (unless the consultants agree to lower fees, which may mean diminished commitment to your work). Worst case scenario, if the consultants disagree, the client will get mixed messages and conflicting advice. A better approach is to hire one firm and ask them how they would go about augmenting their team to include the missing skills. They may already have an affiliation with someone who has the additional expertise you're looking for.

9. HOW DO YOU KEEP A CONSULTING PROJECT ON TRACK AND ON BUDGET?

- Make time to work with your consultant and respond promptly to their requests for information, clarification, or guidance;
- Offer and accept regular feedback on the progress of the project;
- Schedule regular check-ins to help to keep a project on track and make it easy to adjust to changes in what is needed or expected;
- Agree on a team leader who will be the key point of contact throughout; and
- Link the payment schedule to milestones, with a cap on the amount to be billed at each stage.

(Note: If you're working with a team of consultants, make sure you have the right team and that the key members have enough time allocated to the project to get you the results you're looking for.)

10. HOW MUCH TIME WILL IT TAKE TO WORK WITH A CONSULTANT?

The short answer: as much time as it takes, but probably more than you think. Consultants can't do the work without their client's input and guidance. It's good practice to ask the consultant what they will need from you and your team in order to be successful.

At a minimum, expect to make calls and send emails to introduce the consultant to contacts and information sources. You may also be called upon to convene a meeting of key actors to launch the project. And, of course, assume that throughout the course of the work, you will need to meet regularly with the consultants to discuss progress and preliminary results, and to provide feedback.

11. WHAT IF A FOUNDATION PAYS FOR A CONSULTANT TO WORK WITH OUR ORGANIZATION?

When foundations pay consultants directly, it raises issues of accountability and confidentiality and may complicate an already important and perhaps even challenging relationship. However, if a foundation does hire a consultant to work with your organization, all three parties need a clear agreement about decision rights, objectives, approach, and timeframe in which the work is to be completed. Be clear about what information is confidential, what will be shared, and when foundation staff will (and will not) participate in meetings.

12. WHO OWNS THE REPORTS AND OTHER PRODUCTS PRODUCED BY CONSULTANTS?

It depends on the agreement, so don't forget to discuss this, surface your assumptions and theirs, and get the agreement about use and control of work products into the contract.

Questions to consider: Who is the report/product for? Why would your organization want/need to own the product? If you own/distribute the product, how is the consultant's work acknowledged? How much control does s/he have over the content? What if the deliverables include material that may have been previously generated or published?

13. WHAT IF WE CHANGE OUR MINDS ABOUT WHAT WE NEED AFTER WE'VE ENGAGED A CONSULTANT?

Honest and clear communication about the shift in your needs is essential. If you wish to continue working together but alter the course of the work, be candid about what brought about the change in your thinking. (If it's learning from the work conducted so far, you may find that the consultant has already thought about how to re-focus the work). Ask for the consultant's ideas about how the work plan could be revised and amended, any new expertise that should be brought in, and implications for the project budget.

In general, treat the process of revising or amending a work plan and contract as carefully as you would the original negotiation.

14. WHAT DO WE DO IF IT'S NOT WORKING OUT?

Reflect on the causes of the trouble, and be honest about whether you are contributing to the problem. Give honest and constructive feedback, and allow time for the consultant to make adjustments. Be clear about your expectations, and set a date for checking in again. If your best efforts don't get the project back on track, follow the mediation or termination procedures established in the contract including appropriate notice, compensation for work completed before the notice, and ownership of any work already produced.

And don't assume that one disappointing engagement means that the consultant is no good. Their reputation is very important to their ability to make a living. Be very careful what you say – and to whom – when an engagement doesn't work out.