

Helpful
Tips

for Hiring a Consultant

Would we benefit from a consultant?

- Even with a talented team, some tasks and projects could use an outside expert.
- Rather than adding to your full-time staff, you can hire a contractor on an ad-hoc basis.
- Consultants bring skill sets or perspectives that your team may not have.
- Consultants can serve in roles such as advisors, facilitators, coaches and project managers.
- Nonprofit organizations often hire consultants to help with strategic planning, organizational development, event planning, professional development, stakeholder engagement, human resources, executive search and outreach/marketing.

How do we choose the right consultant?

- Define your goals and be clear with what you want to accomplish before you start speaking with consultants.
- Consider any liability, confidentiality or security risks and figure out a plan to navigate these.
- A Request for Proposal (RFP) process is one way to go. Be sure to share the RFP far and wide. Or you can ask colleagues and professional organizations for recommendations and meet with a few consultants, asking for a proposal.
- Meet with the consultant(s) and be ready with questions to ask. Learn if they have the right experiences and qualifications, understand your goals, can do the project in the timeline and within the budget. Questions to ask:
 - How would you approach the project?
 - What is your experience with nonprofits like mine?
 - What is your experience with projects like this?
 - What do you need from my nonprofit to make this a successful working relationship?
 - Can you successfully work within my budget and timeline?



- Expect a written proposal to help answer the questions above, along with a conversation.
- The consultant should “get” your organization. Look for a working style that fits with your organization.
- Check references. Learn from others what their experience was with this consultant.
- Consultant fees are typically hourly or project-based. If a consultant estimates a project fee and the scope of work does not change, even if it takes longer than expected, the fee should not change.
- An organization can pay for consultants by budgeting this in annually. Foundations may also be willing to pay for a consultant for particular projects like board development of strategic planning.
- Beware of unrealistic promises or “big talk” and be sure to ask questions and check references.
- Look out for red flags in the vetting process. Are they timely? Are they available or do you have to chase them down? Are they organized? If there are negative traits they will likely carry over into the project.

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How do we work well together?

- Throughout the process, expect your consultant to be candid, objective, inquisitive and informed.
- The consultant should develop a contract that includes the following:
 - Scope of the work with specific tasks to be performed
 - Clearly defined timeline, roles, and responsibilities
 - Communication plan
 - Description of the final product (written report, oral presentation, or a combination)
 - Payment schedule and fees
 - Confidentiality agreement
- Even with this in writing it is best to have a client/consultant meeting to state the expectations and preferred communication methods.
- Do your part to make the relationship work! Be clear, responsive, a good communicator and accept feedback.

