

# Getting Started with Consultants

As you plan for your capacity-building consultation, please consider these suggestions for getting started on the right track.

## Step 1: Clarify Your Needs and Expectations

Consultants are typically sought to help solve a problem or accomplish a specific task. Before contacting any potential consultants, you should be able to answer these questions --

- ◆ what are your specific needs or problems? While you may not be able to specifically define a problem, you should be able to describe the issues and symptoms. Clearly outline specific tasks you want accomplished.
- ◆ what outcomes are you looking for, or what should be different at the end of the consultation?
- ◆ who will be involved in the consultation – board, staff, committees?

Consultants will also want to know how much you expect to spend, why you are seeking outside help, and any internal politics around the project.

Consultants can bring skills, experience, tools, time, energy, inspiration and perspective to help you solve your problems but they will not do all the work for you nor will they do it alone. You (your board/staff) should plan on working closely with the consultant throughout the process. The more involved you are the happier you will be with the results.

## Step 2: Find the Right Consultant

Consultants are made available to you through the Nonprofit Resource Center. But, this is the easy part; the hard part is assessing skills, experience and working styles to identify the right consultant for you. Some questions for the candidate include:

- ◆ Who have you worked for and what did you do for them?
- ◆ Have you worked on projects/problems similar to ours?
- ◆ How much experience do you have as a consultant?
- ◆ How would you describe your working style (how would we work together)?

Some questions for the consultant's former clients/references include:

- ◆ Would you hire him/her again and is there anything I should know about when considering a contract with him/her?
- ◆ Was the work completed on time, within budget?
- ◆ Did he/she understand your needs and "get up to speed" quickly?
- ◆ Did he/she communicate clearly, easily?
- ◆ How did he/she work with staff and or board members? Did board and/or staff like and respect the consultant?

One way of assessing and comparing consultants for larger projects is to issue a Request for Proposals (RFP) or Request for Qualifications (RFQ). Typically, these documents describe the project or need and request the submission of a work plan, qualifications and cost estimate (RFP) or the submission of qualifications and fee schedules (RFQ). Contact the Center for help and guidelines on RFPs and RFQs.

## Step 3: Put it in Writing

Once you have found the right person, commit your agreement to paper and have both parties sign it. This can be a simple "letter of agreement" or a detailed contract. Either way, it should include the following elements.

- ◆ The work plan or "scope of work," including a description of all products or "deliverables" and their due dates. This is often an attachment.
- ◆ The amount of the contract and/or any payment arrangements and/or amounts.
- ◆ Mediation and contract termination stipulations.
- ◆ If appropriate, copyright and ownership stipulations.

The Nonprofit Resource Center may provide you with sample contract letters, requests for proposals, and other tools for working with consultants.

*Contact the Nonprofit Resource Center at (916) 264-2772 for more information on finding, contracting, and working with consultants.*