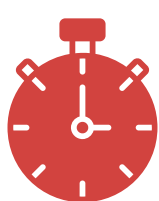


CHOOSING A CONSULTANT

A governance consultant can offer an objective outside perspective to help boards with strategic planning, board education, fundraising, board orientation and development, executive search, board self-assessment, and more. Consultants can play different roles such as advisors- analyzing situations, diagnosing problems, and proposing but not implementing solutions. Other consultants perform particular tasks, such as searching for a chief executive or presenting a board development workshop.

WHAT ARE THE STEPS IN CHOOSING A CONSULTANT?

- Identify the scope of the project and confirm the need for a consultant.
- Outline the tasks you want the consultant to perform.
- Prepare a written description of the project scope and timetable.
- Search for potential consultants.
- Request proposals from individuals or firms.
- Evaluate the proposals and check references of previous clients.
- Choose a consultant and enter into a written agreement.



HOW SHOULD WE BEGIN?

Begin with a clear understanding of what you want the consultant to accomplish. Put your goals in writing, and give this description to the consultants from whom you request proposals.



WHERE CAN WE FIND A CONSULTANT?

Word of mouth is the best source. Be sure to interview a few of the consultant's previous clients before selecting the best fit for your organization. The BoardSource Consultant Directory is another resource for finding governance consultants. These consultants are private contractors invited to be part of the directory based on their expertise and experience in nonprofit governance consulting. To speak to any of these consultants, simply contact them directly from the information listed in their directory profile.



HOW SHOULD WE EVALUATE PROPOSALS?

Balance the importance of experience and quality with your budgetary needs. Questions to consider include the following:

- Does the consultant have the appropriate experience and qualifications?
- Do they understand the goals of the project?
- Do they have a working style that fits well with your organization?
- Can they complete the project on time and within budget?
- Do they ask creative questions about the organization and the project?
- Do previous clients give favorable reports on their working relationships with the consultant?



WHAT SHOULD BE INCLUDED IN A CONSULTANT'S CONTRACT?

A letter of agreement or contract with a consultant can be prepared by either party. It is sometimes helpful to have an attorney review the agreement. The agreement should provide the following:

- A description of the scope of the project.
- An outline of the tasks involved.
- A description of the consultant's reporting system.
- A specification of the nature of the final product (written report, oral presentation, a combination).
- An outline of a timetable.
- The established fee and expected payment schedule.



HOW CAN WE PROMOTE A SUCCESSFUL CONSULTANT EXPERIENCE?

Clarity, candor, and mutual respect contribute to a smooth partnership between the organization and the consultant. On the organization's side, the elements of a good relationship include:

- Clear expectations stated before the project begins.
- Adherence to the terms in the agreement.
- A well-defined reporting system, usually stipulating that the consultant works through the chief executive.
- Open communication in person and by telephone, including checkpoints for measuring progress such as interim reports or regular meetings.
- Follow up at the end of the project to let the consultant know the impact of their work on the organization.