

Tips for Selecting and Working with Consultants

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The process of preparing to select, selecting and engaging with a consultant is a learning opportunity for both you and the consultant. Similar to hiring an employee, your ideas about the project and about what you need from a consultant may change during this process. Here are some tips to guide these efforts.

Preparing to Select a Consultant

Before you can select a consultant, you need to understand your needs and the expertise desired.

- What do you want to accomplish? What expertise do you need from the consultant? What expertise will your organization bring? What is your desired timeline?
- Think about your organization's experiences with consultants and what made those consultancies successful and/or challenging. Clarify expectations of both the consultant and your agency.
- Draft a brief description of the project and your needs that you can share with potential consultants.
- Develop a selection process.
 - Determine whether to issue a formal RFP or to request proposals from potential candidates.
 - Remember you are hiring a person or company, not just an approach.
- Identify potential candidates.
 - Ask peers for recommendations
 - Utilize resources such as the Healthcare Georgia Foundation, membership organizations such as the American Evaluation Association and the Empower Health Resource Guide.

Selecting a Consultant

Selecting the right consultant is key. Develop and implement a standardized, consistent approach to the selection process.

- Screen potential candidates via phone to develop a pool of candidates that fit your criteria. After conducting screening calls, narrow the pool to your top two or three.
- Request a proposal or work plan from this smaller group of candidates.
- After reviewing proposals and/or work plans, conduct interviews and review the candidates with your team to select the consultant that provides the most value to your nonprofit.
- Be sure to involve your team in the selection process to ensure buy-in and commitment to working with the consultant and providing needed information in a timely manner.

Key Issues to Address with Potential Consultants

When selecting a consultant, it is important to ensure that the consultant not only has the expertise desired, but will also be a good fit for your organization. In the interview process, be sure to ask about the following topics:

- Work style or approach
- Experience with similar projects
- Roles and responsibilities – for the consultant and for the organization
- Who from your organization will actually do the work; be sure to meet and assess the qualifications of the person(s) who will actually work with you.
- Communication style and preferences
- Workload and how your project will fit with their other work

Working Successfully with a Consultant

Once you have engaged the right consultant, develop processes and procedures that ensure a strong working relationship and sustained benefit for your organization.

- Clearly delineate roles and responsibilities, timelines and expectations. Understand who will be involved in what steps of the work.
- Hold regular check-in meetings to assess how the work is progressing and adjust as needed. Remember, few projects proceed exactly as planned – be prepared to adjust.
- Provide the consultant with needed information in a timely manner.
- Develop a sustainability plan for ensuring that the work continues post-consultation.
- Solicit feedback from your team and evaluate the process of working with the consultant.

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