



Before you hire a consultant

I wrote this blog to take the mystery out of hiring a consultant. It takes time and preparation to work smart! I hope that this sparks a conversation in your organization.

If you are like the rest of us, you are under pressure, need to raise money and deadlines are fast approaching. This is the nonprofit world with its growing demands and diminishing resources. I have been a consultant for years, and I have hired many consultants. It is not a dance, but a temporary merger. You must have a plan. You need to work from within!

It is true that “el golpe avisa.” or we learn from our actions. In the mid-1980s, I jumped into an executive director turnaround position for a regional organization in California that was in trouble. The innovative Kellogg-United Way Training Center led the board in a self-audit that sparked its transformation. Later, trained as a trainer, I further dedicated my training to work from within an organization, integrating communications and fundraising strategies into the governing structure. I will share a success story with you.

A complicated and positive case story. I was recruited to work with La Clinica Familiar del Barrio, a small East Los Angeles clinic that was planning a major expansion in 1985. My consultant role changed over the three-year engagement, including communications, corporate relations, name change/branding, advertising, event design and sponsorships, developing its first for-profit company, etc. I became a staff member and later returned to a consultant role. No matter what title or project, communications channels were clear and defined. At times, it was important to work onsite, other times in the field. Founded in trust, I was given great freedom to explore innovative opportunities. A potentially dangerous area was avoided with my professional commitment: I reported to the executive director. At the same time, I communicated with the president and the board development team, many of whom I also saw at outside engagements. It would have been easy to bypass the governance structure. We had to focus on what would benefit the vision above any other issues. Yes, it was tempting to take a detour when we had different perspectives! Because of that commitment, La Clinica Familiar del Barrio became AltaMed Health Services Corporation and, after 25 years is close to a billion-dollar regional healthcare company.

An important lesson. The growth and development process offered endless challenges. It was not flawless. We could take detours as needed. and, it was not overnight. Building and developing take great thought and time. If someone promises immediate success.....

1. Planning is a critical first step:

- a. Evaluate your internal resources: financial, information and data, skills, etc.
- b. Be clear about any challenges and issues.

- c. Make sure that staff and board share your vision and understand the governing process: who's in charge and when!
- d. Build your team.
- e. Write a consultant job description detailing expectations, all financial arrangements, reporting, etc., after asking the questions below.

Note: One of my best consultant assignments had a very difficult beginning. No one had told the development director that I had been hired to manage their historic first gala. I had been told not to worry, but I knew better. Keeping focused on the mission, we went from a rocky beginning to a successful event that accomplished all its goals.

2. Ask Critical Questions to Establish a Process

- a. What will success look like?
- b. What concrete achievements will be integrated into your operation?
- c. What are potential areas of collaboration or conflict with staff positions?
- d. Which staff and board members will interact with the consultant: how and when?
- e. How will your consultant's work be aligned and integrated?

3. Your Checklist: Are You Ready to Manage Your Consultant?

Review challenges, resources, goals and direction. Can you confirm:

- a. You are sure about your vision and how it will roll out – and can change direction as needed.
- b. Your governance structure clearly defined and articulated within the organization.
- c. You have staff buy-in to plans and goals.
- d. There is a clearly defined communications process in place.
- e. The consultant assignment is defined in “chapters” that can be monitored, tracked, and integrated.

Sometimes we are the trainer, sometimes the trainee. Hiring a consultant is a great time to take stock of your organization and continue to build your team. Go forward with anticipation, remembering that every engagement is like the first time: each has its ambiguities and unexpected turns.