

# GUIDE TO EVALUATING A CONSULTANT

## I. Why Hire a Consultant

*Do you want to:*

### Increase your Productivity?

- Consultants increase the organization's productivity and efficiency by enabling it to address essential issues to which staff cannot effectively devote adequate time.

### Secure Objective Evaluation and Assessment?

- Outside consultants can recognize and voice matters that internal staff do not recognize or may be reluctant to discuss.

### Obtain Specialized Expertise?

- In highly-developed specialty areas such as marketing, technology, and board development, consultants can provide guidance and complete critical projects.

### Draw on Invaluable Experience?

- Since consultants work with many programs and institutions, they can broaden the range of options to consider, provide a seasoned perspective, and suggest which avenues are most promising to explore.

**\_\_\_ Control Your Costs by Selective Investment?**

- Cost-effective with a high success rate, consultants provide an attractive alternative to expanding the fixed costs of staffing.

**II. When to Hire a Consultant**

*Do you need to:*

**\_\_\_ Plan, initiate or execute special projects?**

**\_\_\_ Undertake major new initiatives?**

**\_\_\_ Evaluate or refresh current programs?**

**\_\_\_ Transition from short-term to long-term planning?**

**\_\_\_ Initiate strategic assessment and/or strategic planning?**

**\_\_\_ Handle staff responsibilities on an interim basis during transitions?**

**III. Checklist for Choosing the Right Consultant**

**\_\_\_ 1. Clearly define the project(s) for which you need outside help.**

- ☐ Build Board and staff consensus on need to hire consultant.
- ☐ Determine internal decision makers and selection process.
- ☐ Out of many possible outcomes, what, specifically, do you want to achieve?

\_\_\_2. Identify appropriate consultants to help you achieve your goals. Sources include:

- ☐ Directories: ACN, for example, publishes an on-line directory by category.
- ☐ Referrals: both personal and professional sources.
- ☐ Advertisements: trade publications and/or yellow pages.
- ☐ Determine arena and level of expertise required; confirm budget available.

\_\_\_3. Screen prospect pool to top candidates.

- ☐ Request basic information from all candidates, then select finalists to interview.
- ☐ At least two is productive; three is plenty; more than four begins to be counterproductive.

\_\_\_4. Schedule face-to-face meetings with your top prospects.

- ☐ Allow at least one hour for each-anything less is not in your own best interest.
- ☐ Provide appropriate organizational information to each prior to your meeting.
- ☐ List your criteria and key questions, then use consistently for each presentation.

\_\_\_5. Make sure that the consultant's philosophy and mission are compatible with your own.

- ☐ Agreement on values, vision and personal compatibility are essential.

\_\_\_6. Request proposals from your top candidates.

- ☐ Ask them to specifically address what services they will provide, their cost and fees, a preliminary timeframe and the expected outcome.

- ☐ Are there organization-specific questions for which you need an answer as well?

\_\_\_7. Frame cost considerations in terms of net gain.

- ☐ Experience shows that the lowest bid may not turn out to be the least expensive.
- ☐ Meeting your net objective is the ultimate goal.

\_\_\_8. Check references provided by consultant finalists.

- ☐ Ask if former clients would hire the consultant again.

\_\_\_9. Notify all candidates of your final decision in a timely manner.

\_\_\_10. Request a detailed contract specifying:

- ☐ Services
- ☐ Schedule
- ☐ Fees and Reimbursed Expenses
- ☐ Termination Clauses
- ☐ Personnel
- ☐ Payment Terms
- ☐ Location