

In Search of the

WHITE KNIGHT

Finding the Perfect Consultant

**To reach a storybook ending,
you need to put in some time
at the beginning.**

BY TERRIE TEMKIN

our organization may be one of many nonprofits turning to consultants. As a board member or administrator, you may be looking for help with strategic planning, aware that your organization must deal effectively with the rapidly changing environment. You may be looking for an extra pair of skilled hands, perhaps because downsizing has stripped your organization of valuable workers. You may be looking for someone who can provide governance advice, turn the board or staff into a cohesive team, or facilitate a merger. If you're like most people in your position, you're looking for a white knight and a storybook ending. In many cases, you will pay a high cost to realize this dream. But are you making wise choices in the consultants you select? Are you prepared to work effectively with the consultants? Have you determined your organization's needs, concerns, and goals?

There's no dearth of consultants from which to choose. Unfortunately, all it takes to call oneself a "consultant" is an \$18 pack of business cards. For many out of work, it is a face-saving title that buys legitimacy between "real" jobs. You want to protect your organization from such fly-by-night operators. Yet you don't want to pass up one of the many excellent small shops out there just because the consultant is also the chief cook and bottle washer. Using only big firms is not necessarily the answer. They may be staffed primarily by young and relatively inexperienced people. And cost is more a measure of the consultant's chutzpa than the quality of the service.

So how do you choose the right person or firm to work with your organization? Here are steps to follow.

CLARIFY YOUR GOALS

First, ask yourself these questions:

1. Why do you want to hire a consultant? What made you pick up the phone *today* to look for help?
2. What issues or problems do you want the consultant to address?
3. What symptoms indicate a need for intervention? What are the significance and scope of these symptoms? How do these symptoms affect the staff, board, volunteers, clients, and community?
4. How do you want the organization to be different after the consultant leaves?
6. What qualifications would your ideal consultant have?
7. How will you know when your goals have been achieved? How will you measure success?

The answers to these questions are important for two reasons. First, unless you define your destination and the roads you will take to reach it, you will wander aimlessly, racking up costs and frustration.

Second, most consultants specialize. If you hire a fundraising specialist to work with your organization on fundraising and a governance specialist to work with the board, you increase your chances of getting the best results. When special credentialing is required—for example, Florida requires its fundraising consultants to register with the state and post a bond—the specialists are most likely to be in compliance.

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IS THIS YOUR WHITE KNIGHT?

While interviewing for a consultant, look for answers to these questions:

1. Does the consultant have the time and interest to devote to your project?
2. Does the consultant have previous experience with nonprofit organizations?
3. Does the consultant have the skills needed for your project?
4. Is the consultant flexible?
5. Does the consultant have experience with the tasks that will be necessary?
6. Does the consultant have the appropriate resources to complete the project on time?
7. Does the consultant contribute to the field by writing or presenting papers related to the task at hand?
8. Does the consultant keep up with changes in the field through membership in professional associations?
9. Does the consultant grasp the big picture as well as the details of the project?
10. Does the consultant listen well? (Good consultants spend more time listening to your needs than extolling their own virtues.)
11. Does the consultant have training and experience in the specific area with which you need help?
12. Does the consultant show respect for your organization and the people in it?
13. Does the consultant have a list of satisfied customers to whom you can speak? When you contact these people, is their response enthusiastic?
14. Does the consultant's image and style fit the norms of the organization?
15. Does the consultant get along with the other people who will be working on this project?
16. If the consultant hasn't ever undertaken a project like yours, are there compensating factors that make this a good choice?

Good consultants spend more time listening than extolling their own virtues.

PINPOINT YOUR EXPECTATIONS

Now that you know what type of consultant you will be seeking, ask yourself these questions:

1. What resources can you commit to this project?
2. What non-negotiable issues must the consultant work with?
3. How much authority will you give the consultant?
4. For what tasks will the consultant be responsible?
5. How much time will the consultant have to finish the project?
6. Exactly what outcomes do you expect from the consultant's work?
7. To whom, how, and how often will the consultant report?

The consultant will need your answers to these questions before beginning to work for you. Better to determine the answers "off the clock" than after you start paying for the consultant's time.

FIND A POOL OF CANDIDATES

Next, solicit bids from consultants. Be sure to look at a large enough pool of people. Here are some tips on where to look:

1. Consider consultants who have worked for your organization before.
2. Ask colleagues in your community who have used consultants successfully.
3. Call your community foundation. Recognizing the importance of consultants, community foundations in many cities are granting funds to help nonprofits hire consultants. Most community foundations also keep lists of consultants in the area that they recommend.
4. Check with a local university for professors who do research in the field.
5. Check professional journals and Internet sites in your field. (See, for example, the *Directory of Nonprofit Providers*, beginning on page 27 of this issue of *Nonprofit World*.)
6. Log onto a computer bulletin board designed for sharing information in the nonprofit sector, and ask for names and reputations.

INTERVIEW CANDIDATES

Now that you have a list of qualified candidates, it's time to narrow it down to the best possible choice. While boards are responsible for hiring consultants, they need not—and probably should not—handle all the details of this step. Consider having the board appoint a committee of relevant stakeholders. This committee can solicit and review proposals, interview candidates, then recommend a single name for board approval or two names from which the board may choose.

Don't go overboard when interviewing potential consultants. If you want someone to head a day-long retreat, for instance, you don't need to interview them the way you would candidates for executive director. Such extensive questioning is not an effective use of time.

What factors should you weigh as you make your final choice? Chemistry is important. You will also want to consider price. You will need to check candidates' references. Most of all, look for the right fit—the person whose qualifications mesh with your needs. To find that perfect match, base your decision on the answers you receive to 16 questions (see "Is This Your White Knight?" on page 38).

No consultant can make your problems disappear overnight. A good one, however, can play a vital role in furthering your organization's mission. ■

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These publications are available through the Society for Nonprofit Organizations' Resource Center. For ordering information, see the Society's *Resource Center Catalog*, included in this issue, or contact the Society at 6314 Odana Road, Suite 1, Madison, Wisconsin 53719 (800-424-7367).

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