

## Working with Consultants: What You Should Know for a Productive Relationship

---

### Hire a Consultant When...

- The skill, expertise or knowledge required is not available within the foundation
- A heavy workload requires a temporary increase in staffing
- An objective, neutral perspective would be helpful
- Access to a wider range of contacts and resources is desired
- Assistance is necessary to achieve consensus
- No one in the organization wants to do the work required
- Credibility is needed within the foundation or with external organizations

### To Have a Successful Relationship with a Consultant...

- Clarify your goals and the type of assistance needed.  
*(What do you want to accomplish?)*
- Select a consultant who has the knowledge and skills you need.  
*(What is the consultant's training and prior work? What do others tell you?)*
- Define the scope of work and how you will measure success.  
*(What steps will be taken? What are the deliverables? What is the timeline?)*
- Specify roles and responsibilities of the consultant, and your staff and board members. *(Who will do what and when to assure success?)*
- Provide the resources to address the work.  
*(What information, human and financial resources are needed?)*
- Agree on a plan for interim reporting or updates.  
*(How and when will the consultant provide progress reports, and to whom?)*
- Provide a contact person who is available to the consultant.  
*(When the consultant has questions, who should be contacted?)*

## **Some Possible Ways to Use Consultants**

### **1. Manage Grantmaking Programs and/or General Operations**

- Plan board meetings with you
- Prepare materials for meetings
- Guide decision-making process
- Write minutes of meetings
- Maintain grant files and records
- Respond to grantseekers
- Invite proposals, review, and shape them
- Write summaries of proposals
- Prepare grant award letters
- Track and prepare reports on grants awarded
- Conduct pre-grant and post-grant site visits
- Provide ongoing coaching about grantmaking
- Supply back-office support, e.g. basic bookkeeping, financial reports, etc.

### **2. Undertake Special Projects or Initiatives**

- Help define your foundation's grantmaking interests and strategies
- Guide strategic planning
- Identify and connect you with experts who can educate and guide you
- Conduct research on topics of interest
- Develop formal guidelines for your grantmaking
- Create and disseminate a Request for Proposal (RFP)
- Assess and summarize proposals received in response to an RFP
- Evaluate the work or operations of your foundation
- Create a website, report, press release, or article about your work
- Develop or update policies for your foundation
- Assist with succession planning
- Discuss and resolve governance issues

### **3. Plan and Facilitate Meetings and Retreats**

- Achieve consensus on priorities or difficult board decisions
- Design and conduct capacity-building meetings for grantees or grantseekers
- Prepare presentations and conduct meetings with other grantmakers
- Host meetings with experts in your fields of interest

## How to Find Consultants

- Ask colleagues at other foundations
- Talk with your regional association of grantmakers (See [www.givingforum.org](http://www.givingforum.org))
- Talk with an affinity group, if relevant (Search for “affinity group” at [www.cof.org](http://www.cof.org) )  
(Grantmakers in Health, Grantmakers in Aging, Neighborhood Funders Group, Grantmakers in Education, Environmental Grantmakers Association, etc.)
- Check listings of consultants with these organizations:
  - National Network of Consultants to Grantmakers (NCCG) ([www.nccg.org](http://www.nccg.org))  
Directory of member consultants
  - Association of Small Foundations ([www.smallfoundations.org](http://www.smallfoundations.org))  
Professional Directory of Foundation Advisors

## How to Hire A Consultant

1. Look at websites of consultants, if available.
2. Call and talk with several to learn of their expertise and of work they have done.
3. Unless one consultant was referred by a very reliable and trusted source, select 2 to 4 to interview in person. Send information to each about the work to be done.
4. Conduct interviews. (Primary person consultant would work with should be present.) Interviews should reveal which consultant has best skills, experience, style and “chemistry” for your foundation.
  - ask for examples of comparable work
  - how would the consultant approach your work?
  - how does the consultant prefer to communicate?
  - what would challenges of your work be for the consultant?
  - what would the consultant need from your foundation to do the work well?
  - what are the consultant’s fees? are there other charges?
5. Talk with at least two references for your top two choices.
6. Decide the consultant to be hired.
7. With the consultant to be hired, discuss a draft agreement that includes the following:
  - clear description of the work to be done
  - outcomes and products, specifying who will own the products
  - reporting by the consultant
  - estimated timeline and critical dates
  - resources to be provided by the foundation
  - fees and costs to be paid and timing of payments
8. Sign the agreement and begin working together.
9. Stay updated on the consultant’s progress. Voice any questions/concerns.