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Using a Consultant

Outside consultants can lend a fresh eye — and a fresh perspective — to your plan. Just don't expect them to write it.

Many nonprofits that formulate strategic plans do so with the help of outside consultants. Their role is largely one of facilitator. They help move discussion along, interview staff, and define what research will be needed, but they don't take sides in arguments. Consultants also bring an objective perspective to the planning process and help keep participants focused.

"I can't imagine going through the process alone," says Barbara Bryan, president of New York Regional Association of Grantmakers. She's led the group through several strategic plans and insists on using an outside consultant every time.

"What happens is that people have roles they bring to the table," she says. "Who moderates? Who helps the process along? Who introduces techniques to get different issues included? Getting an outsider or a firm to help manage the process is extremely helpful."

That said, there are some unrealistic expectations of planning consultants. Consultant Michela Perrone says a red flag goes up when an organization calls her and asks what's involved in having her write a plan for them. She says a key part of staff and board buy-in comes from their involvement during the writing process. A plan written by an outsider will end up as an expensive paperweight instead of a living document that guides the organization, she says.

By the same token, consultants are not supposed to enter into discussions or sway participants to one side of a disagreement. Their role is to keep conversation productive and on topic and move the process along, not shape the plan itself, Perrone says.

Mike Allison, director of consulting and research at San Francisco's CompassPoint Nonprofit Services, says there are some key things to look for when hiring a consultant to act as traffic cop. "One thing to look for is someone who can manage the process," he says. "Another is to find someone with strategic planning expertise. If a group has strategic-planning experience, though, they may just need someone to act as a facilitator."

Yet another goal, he says, is to find someone with experience in the organization's key area, whether that's housing, the arts, or a service or industry. Richard agrees. "If you can find a neutral party, somebody who doesn't have a personal agenda, and who knows the field, it can be very useful," he says. "The further afield a consultant is, the more critical it is that that person be taken to school early on mission issues."

The Right Fit: Finding a Consultant

Lots of people advertise themselves as consultants or facilitators for strategic planning. But how do you know who's right for you?

If you've already decided a consultant could help make the strategic-planning process easier for your organization, here are

some things to consider:

- Look for someone who understands his or her role as a traffic cop. A consultant who wants to join in arguments, take sides, or actually write the plan probably isn't going to be a very good facilitator. The consultant should be an objective catalyst for change.
- Find someone who's not connected with the organization. Anyone with a personal agenda is going to be more of a hindrance than a help.
- Someone who has experience interviewing can be helpful if the organization's staff is too large to directly involve everyone. Having outside consultant interviews may bring more honest results than having a supervisor conduct conversations.
- A consultant must understand the difference between operational and strategic thinking, and be able to focus the discussion on the latter.
- Someone with field expertise can be helpful, as long as they don't have a vested interest in the outcome of the plan. For example, finding a consultant who's familiar with the arts might be a benefit for arts-focused organizations.
- A consultant should be able to commit enough time to help with research when necessary and facilitate all discussions. An overbooked consultant can slow down the process, which could spell disaster.

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