

# GETTING THE MOST FROM YOUR CONSULTING ENGAGEMENTS

PRESENTED BY



**NSP**

**Nonprofit Support Program**

HARTFORD FOUNDATION FOR PUBLIC GIVING

# CONSULTING ENGAGEMENTS

## WELCOME & INTRODUCTIONS



# CONSULTING ENGAGEMENTS



**Frank Abdale** is the Founder and Chief Consultant of Abdale Consulting. With 20+ years nonprofit sector, Frank is a proven strategist, facilitator, teacher, leader and author. As a consultant, Frank has helped a wide range of nonprofits develop successful strategies for sustainability through strategic planning, succession planning and board development.

Frank is a BoardSource™ Certified Governance Trainer, a Senior Associate Consultant with the Support Center, a member of the Advisory Council at Long Island Crisis Center where he served as vice president of the board, and former chair of the Association of Nonprofit Specialists (ANS), a premier resource for consultants working in the nonprofit sector. As chair of ANS, Frank helped lead a small organization on extended hiatus into new relevancy. At ANS he helped develop their signature programs “The Consultants Institute” and “How to Work with Consultants.”

The former executive director of the Association of Nutrition Services Agencies, Frank transformed a small association into a nationally recognized force. He expanded and diversified the agency’s funding base, built an effective grassroots and national advocacy program, wrote legislation introduced into the House and Senate and launched an international program focused on nutrition and HIV/AIDS in South Africa and Namibia. His publications include *Practical Abundance: A Comprehensive Guide to Fundraising and Development for Nonprofits* which he used as the text for “Fundraising Concepts and Practices”, a course he co-taught at NYU’s School of Continuing Education and Professional Studies.

You can learn more about Frank and his practice at [www.abdaleconsulting.com](http://www.abdaleconsulting.com).

# CONSULTING ENGAGEMENTS

## SESSION PARTICIPATION

- Muting
- Chat
- Q&A
- Slides/recording

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## COMMUNITY AGREEMENTS

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- Be present & participate
- Mind your “air-time”
- Avoid “cross-talking”
- Use “I” statements
- Respect differences
- Assume best intentions
- Maintain confidentiality
- Other?

# CONSULTING ENGAGEMENTS

## GOALS FOR TODAY

- Discuss best practices for managing consultant engagements.
- Identify tools and techniques for managing the relationship and maximizing impact.
- Identify when to work with consultants and how to choose the right one.
- Discuss legal and ethical considerations of working with consultants.
- Tap into collective wisdom.
- Identify resources / next steps.

# SUCCESSION PLANNING



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**What brought you here today?  
What would you like to take  
home?**

**Please answer in CHAT**

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## DEFINE OUR TERMS

**definition** /,defɪˈnɪʃ(ə)n/ *n.* 1 a definition  
**b** statement of the meaning of a word, etc. 2 distinctness in outline, esp. of a photographic image. [Latin: related to **DEFINE**]

**definitive** /dɪˈfɪnɪtɪv/ *adj.* 1 (of an answer, verdict, etc.) decisive, unqualified, final. 2 (of a book etc.)

# CONSULTING ENGAGEMENTS

## WHAT IS A CONSULTANT?

*“Any time you give advice to someone in the position to make the choice, you are consulting.”*

- Peter Block, Flawless Consulting

Consultants Can:

- Offer specialized knowledge and skills.
- Offer services and expertise not available or not needed on the regular payroll.
- Help analyze problems, recommend solutions and, when necessary, aid in implementing the solutions.
- Have influence, but no power to make changes or implement programs.

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BEST OR WORST EXPERIENCE WORKING w/ A  
CONSULTANT



What did you learn?

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## SMALL GROUP DEBRIEF



What did you learn?

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# CONSULTING ENGAGEMENTS

## BENEFITS OF WORKING WITH CONSULTANTS

- Bring specialized knowledge and skills
- Have expertise not available from staff or board
- Analyze & help solve problems
- Bring a neutral, outside perspective
- Can provide validation
- Increase capacity

# CONSULTING ENGAGEMENTS

## INCREASE CAPACITY

- Create a roadmap for the future
- Guide you through a transition – growth / contraction / merger / leadership
- Strategically develop your board
- Help raise money & manage it
- Develop marketing/communications strategies
- Train / support your staff &/or board

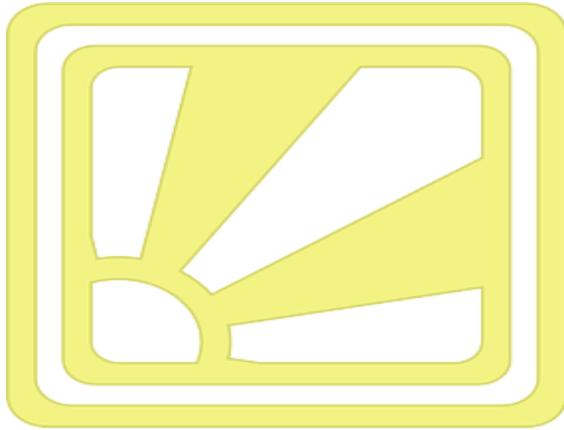
# CONSULTING ENGAGEMENTS

## POLL # 1

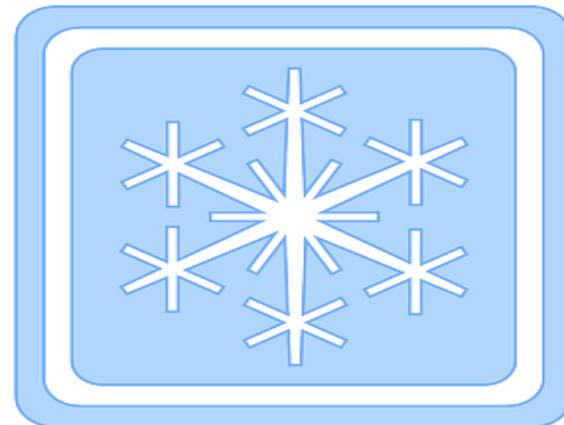
How have you used consultants?

- Board development
- Finance
- Fund development
- HR
- Outcomes measurement /Program evaluation
- Strategic Planning
- Succession planning
- Other?

# CONSULTING ENGAGEMENTS



## Phases of Consulting Engagements



# CONSULTING ENGAGEMENTS

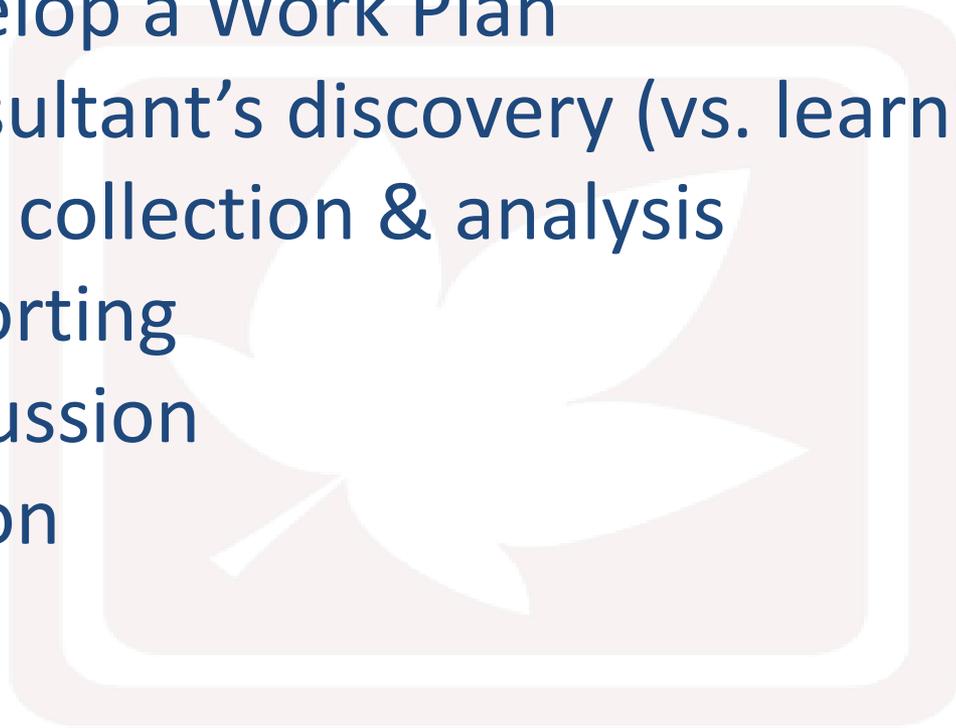
## ENTRY & CONTRACTING

- Form appropriate committee (if needed)
- Develop request for proposal (RFP)
- Develop means of evaluating submissions
- Identify outlets for posting the RFP
- Conduct interviews
- Enter into a contract

# CONSULTING ENGAGEMENTS

## DISCOVERY / DATA / DIALOG

- Develop a Work Plan
- Consultant's discovery (vs. learning curve)
- Data collection & analysis
- Reporting
- Discussion
- Action



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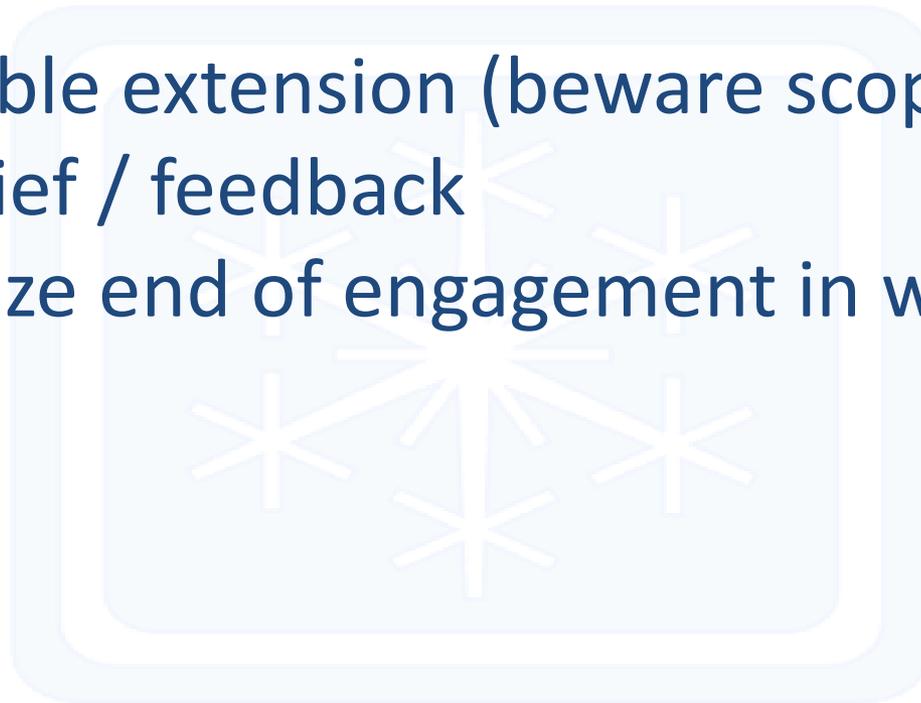
## PLANNING / IMPLEMENTATION

- Articulate high-level goals &/or aspirations for a successful outcome
- Develop strategies & tactics
- Identify benchmarks for success
- Possibly assist with implementation

# CONSULTING ENGAGEMENTS

## TERMINATION

- Possible extension (beware scope creep)
- Debrief / feedback
- Finalize end of engagement in writing



# CONSULTING ENGAGEMENTS

## REQUEST FOR PROPOSAL (RFP)

- Background / rationale for consultant
- Format for submissions
- Clear scope of work
- Skills / experience needed
- Timeline
- Budget / budget range
- References
- Distribution through traditional & nontraditional channels

See RFP Guideline <https://www.neconsultant.org/resources/sample-request-proposal-rfp>

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## EVALUATE RFP RESPONSES

- Acknowledge receipt
- Apply scoring system
- Schedule / conduct interviews (See sample interview questions - <https://www.neconsultant.org/resources/interviewing-candidates>)
- Send acceptance or polite declination

# CONSULTING ENGAGEMENTS

## WHERE TO FIND CONSULTANTS

- Colleagues
- New England Nonprofit Consultant Directory  
-<https://www.neconsultant.org>
- Management Support Organizations
- Funders
- Associations
- Academic institutions
- For-profits

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## POLL #2

Where have you found consultants?



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## IDEAL CONSULTANT CHARACTERISTICS

- Demonstrated understanding of organization, mission and issues to be addressed
- Expertise – Content vs. Process (or both)
- Experience
- Flexibility
- Clear Communicator (and listener)
- Collaborative – ability to work well with staff, board and a range of stakeholders
- Responsiveness
- Integrity / Credibility = Trust
- Respect
- References
- Good fit

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## CONTRACTS

- Set the tone for the project
- Makes expectations crystal clear
- Defines the client/consultant relationship



# CONSULTING ENGAGEMENTS

## CONTRACT ELEMENTS

- Scope of work – clear statement of issues to be addressed
- Timeline
- Objectives & Deliverables (w/ proviso for adjustments)
- Roles & Responsibilities of all parties
- Fees – payment schedules and criteria
- Confidentiality clause
- Address relevant licenses, regulations and insurance issues
- Exit strategy
- Provision for feedback post-engagement (optional)
- Attachments (initial proposal, copies of license, etc.)
- See sample contract in the Consultant Directory  
<https://www.neconsultant.org/resources>

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## SAMPLE WORKPLAN

CLIENT	NAME / LOGO			
PROJECT	STRATEGIC PLANNING			
PHASE I	PREPARING FOR STRATEGIC PLANNING & ASSESSING THE ENVIRONMENT			
ACTIVITY	PROCESS	PERSON(S) RESPONSIBLE	TIMEFRAME	OUTCOMES
Convene strategic plan coordinating committee (SPCC)	Identify and invite committee members, define committee's purpose	Consultant (FA) Executive Director	June	Representative committee that understands its role in moving the process forward and keeping it on track Committee Chair & Charter
Gather background information on board and senior staff perspective of GRCC	Conduct telephone interviews with members of the SPCC & prepare report synthesizing findings	Consultant (FA) SPCC	July 7 – July 22	Insight into the state of GRCC from a board and senior staff perspective  Names of other stakeholders to interview
Gather background information from internal and external stakeholders recommended by SPCC	Design & conduct telephone interviews, surveys and/or focus groups & prepare report synthesizing finding	Consultant (FA)	July 24 – Oct. 1	Well-rounded, well-informed perspective on GRCC
Assess GRCC's effectiveness and culture in four core areas and compare its performance to other social service agencies	Administer the Core Capacity Assessment Tool (CCAT )	GRCC senior staff and board Consultant (DT)	Aug. 4 – Sept. 7	Objective data and independent measurement of GRCC effectiveness in relation to leadership, adaptability, management, technical capacities and organizational culture.

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BEWARE  
SCOPE CREEP

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## SCOPE CREEP

- Time is spent on issues outside initial scope of work
- Largely unintentional
- Inadvertent consequence of trust
- Projects may not proceed as planned
- Cannot occur unless both the client and the consultant participate
- Easy way out – don't lose the opportunity to engage new perspectives
- Refer to the contract!

# CONSULTING ENGAGEMENTS

## UNDERSTANDING CONSULTANT FEES

- Can vary based on:
  - type of expertise needed
  - level of experience
  - geography
  - scope of work
  - amount of time involved
- Consultant overhead
- Hourly/day/weekly, retainer, project fee

# CONSULTING ENGAGEMENTS

## LEGAL & ETHICAL CONSIDERATIONS

- Compliance with all regulations
- Follow best practices
- Tell the truth – even when it's uncomfortable
- Using the “consultant” as a substitute for “staff”

# CONSULTING ENGAGEMENTS

## MANAGING THE RELATIONSHIP

- Be honest
- Clarify expectations
- Ask until you understand
- Require regular reports (can be informal)
- Be available
- Make sure you have the time needed to oversee
- Engage in ongoing communication
- Address issues immediately and directly
- Don't be afraid

# CONSULTING ENGAGEMENTS

## MANAGING THE RELATIONSHIP

THEY ARE THE EXPERT

BUT YOU ARE THE BOSS

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## THANK YOU!



Frank Abdale

[www.abdaleconsulting.com](http://www.abdaleconsulting.com)