

Working with a Consultant: Everything You Need to Know

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Why hire a consultant?

- Single project or ongoing
- Experience & expertise
- Additional training
- Challenges or time constraints

What is the value?

- Outside voice
- Leverage, take risks
- Share in your success

Do you NEED a consultant?

- specialized skill or expertise
- specific problem solved
- objective point of view
- can't create a long-term staff position
- organization in crisis
- upgrade services or programs
- expanding to abigger market

Are you ready?

1. Capacity?
2. Goals?
3. Stakeholders aligned?

Finding the Right Consultant

- Referrals
- Invite proposals
- Internet searches
- Networking/Conference
- Interviews
- Trial projects

Contracts

Background
Terms and timeline
Termination process
Compensation & invoicing
Disclaimers
Confidentiality

Getting Started

Provide key info (strategic, fundraising, communication plans, bylaws. etc.)
Engage key stakeholders
Set an initial meeting

Potential Areas:

- Administration & General Management
- Board Development
- Capacity Building
- Communications
- Development/ Fundraising
- Finance and Accounting
- Grant Writing
- Graphic Design
- Group Facilitation
- Human Resources
- Information Systems
- Leadership Development
- Executive Coaching
- Marketing
- Market Research
- Marketing Strategy
- Organizational Development
- Program Design, Management & Evaluation
- Public Affairs
- Public Relations
- Strategic Planning
- Social Enterprise
- Social Media
- Writing/Editing

Texas Pioneer Foundation
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