

When to Consider Retaining a Consultant

I have recently read a number of articles and advertisements offering advice regarding when to consider retaining a consultant. Most are informative. All are wordy. A few perhaps misleading. In my professional experience there are three basic considerations in determining whether or not to retain a consultant.

- **Experience:** Does the consultant have considerably more experience than you or your colleagues, with a number of comparable organizations which will provide positive references, in area(s) you would like to examine and/or improve?
- **Objectivity:** Would an external perspective of your organization's strategies and methodologies be valued from an experienced, reputable professional who is able to communicate conclusions and recommendations to your organization's leadership which may be difficult for you and your colleagues to communicate?
- **Time:** Presuming you and your colleagues are very experienced, can maintain a reasonable level of objectivity, and have the benefit of open and candid communications with your organization's leadership, but do not have the necessary time to focus on the area(s) you would like to examine and/or improve?

Any one or all of those basic considerations should aid you in determining whether or not to retain a consultant. As added considerations in making that decision the following quotes from non-profit sector executives are from articles published in the November, 2009 issue of *PJ Philanthropy Journal* produced by Hartsook Companies, Inc.

- *"Deciding whether to turn to a consultant, and then finding the right one and ensuring a successful outcome, **requires that nonprofits be ready for change, and clear about what they want.**"*
- *"Nonprofits should be **ready and willing as an organization to team with a consultant**, creating a true collaboration in which the goals, relationships and respective roles are spelled out in written form and understood."*
- *"Being ready means the CEO, senior leadership and board must be really committed to going through a change process, investing the time, money and energy required, and **willing to act on what in the end the consultant recommends.**"*
- *"While the nonprofit should **monitor the consultant and communicate regularly**, don't micromanage. Let them do the work."*
- *"Nonprofits should **provide the consultant with lots of good background** on the organization so they understand their client."*
- *"Outside **consultants can provide the neutrality and a broader perspective** that people closely connected to the organization lack."*
- *"Consultants also can **help an organization effect a change in direction or tackle a difficult task.**"*
- *"A consultant **can focus and get it done.** They're not distracted by the upcoming fundraiser or the personnel issues. They were hired to address that one thing."*