



MOVE TO **END** **VIOLENCE**

**Guide to Selecting an
Organizational Development
Consultant**

Spring 2012

Move to End Violence
OD Cornerstone
Planning for a Successful Consultant Engagement

We offer this resource to help cohort organizations successfully select and engage with a consultant (adapted with permission from RoadMap).

1. Identify priorities in the assessment process
2. Set goals and expectations
3. Clarify the role of the consultant and skills needed
4. Identify potential consultants
5. Interview potential consultants
6. Check consultant's references
7. Select the consultant
8. Produce a written scope of work with the consultant
9. Getting started with the consultant
10. Manage the consultant relationship throughout the project

1. Use the assessment process to identify priorities and consider readiness for OD/capacity building.

During the OD Assessment process, you will use formal assessment data and other information to better understand your organization's core strengths and areas for growth. You may find that there are a number of areas that you could choose to develop, for example:

- Building alignment around the mission statement and/or vision of the organization
- Strategic planning, long-term program planning
- Evaluation and documentation
- Skills development – People Management, Financial Management, Fund Development
- Leadership coaching and mentoring
- Board development, governance issues
- Organizational restructuring
- Fund development strategies
- Team development
- Strategic Leadership Development, including succession planning and leadership transitions

To prioritize between possible areas of work, consider:

- What OD priorities align well with the organization's mission, vision, values and practice?
- What priorities support long-term organizational learning and reflection?
- What priorities support the programmatic and financial sustainability of the organization?
- What priorities best leverage the self-care, strategy and transformative leadership work of the initiative?
- What priorities strengthen organizational capacity, but also reflect creativity, innovation and collaboration?
- What priorities increase organizational capacity to implement social change strategies?
- What priorities move the organization towards more joyful and collaborative or shared leadership models?
- What priorities support movement leadership?
- What priorities lend themselves to increased collaboration and partnership with other organizations?
- What priorities play off of successful OD work (or other initiatives) the organization has done in the past?

- What priorities support implementation of Move to End Violence's Theory of Change?

In addition to prioritizing areas of work, you should think about organizational readiness and capacity for organizational development. Do you have the staff time and energy needed to focus on the particular issues at this time? Can the Executive Director and other organizational leaders engage consistently in the project to ensure buy-in and follow through? What are the pros and cons of working on this at this time? Are there competing priorities or crisis-conditions that will affect staff or board members' ability to focus on the project? The OD Coach can help you assess organizational readiness to ensure that the project can be successful.

2. Set goals and expectations

Once you have narrowed the issues to be investigated, it is important to set concrete goals. These should be explicit and shared between the organization and the consultant. Goals may shift as the consultant assesses the situation in more detail or as the work progresses. Any shifts should be articulated explicitly. Clarifying goals is an important starting point and will establish a common understanding of expected outcomes as you monitor your progress over time.

- Goals: What will be accomplished? What will be different in your organization as a result of this project? How will the organization measure success? How will it evaluate the consultant's role and project outcomes?
- Timeline: How many hours do you think will be required to accomplish the project? What is your target date for completion? Are there other benchmarks between the start and end of the project that will help you build a timeline? Are there specific deadlines, related meetings, retreats or Board actions that need to be taken into account with regard to the timeline? (Note: for the Pilot cohort, Move to End Violence requires that the OD/Capacity Building work begin by December 2012 and end by June 2013.)
- Team: Who will be involved in selecting the consultant? Who should be on the Project Team that will be involved in doing the work? Who will serve as the liaison or primary contact person with the consultant?

3. Clarify the role of the consultant and skills needed

Organizational Development consultants act primarily as facilitators who work with your group to help frame the issues you are confronting and to guide your organization's stakeholders in discussion to address key questions related to strategy or future plans. A consultant does not solve organizational problems, but works with you to develop solutions yourself.

Organizational Development consultants provide support and challenge in order to build the capacity of the organization to work effectively and move strategically.

The consultant might:

- Provide expertise or insights to complement existing staff resources
- Facilitate your organization's focus on a set of (often complex and interlocking) issues that may require resolution to enable the organization to operate well
- Build skills and confidence of staff and board
- Provide perspective and process to analyze a situation or issue
- Challenge common assumptions and stimulate critical thinking
- Encourage participation of stakeholders (who are sometimes more open or willing to express their opinions with outside facilitation or in a confidential conversation)
- Bring technical expertise and knowledge of common problems, as well as a variety of possible solutions, best practices or relevant research in the field.
- Provide feedback to individuals and teams in order to create greater awareness
- Create space for learning and reflection for individual staff and for the organization as a whole

A consultant should support, not substitute, your efforts to address the issue at hand. Consider asking possible consultants how s/he will share knowledge to leave behind new skills and analytical tools once the job is done. Consider what the organization's staff can do on its own and what it will need consultant guidance to accomplish. You will be able to make better use of the consultant's hours and, at the same time develop capacity and skills among your staff, if you are careful to ask the consultant to guide you, rather than to do the work for you.

List the skills or qualities that you seek in the consultant, as well as the roles you expect the consultant to play. These might include:

- Facilitating small and/or large groups
- Analyzing issues and outlining a range of potential solutions
- Interviewing internal stakeholders
- Interviewing external stakeholders
- Writing memos for internal use throughout the process
- Writing materials for public use
- Skills training on specific topics
- Coaching one or more individuals

4. Identify consultant choices

Draft the Project Summary, Overview of OD Needs Identification Process, and Desired Project Outcomes (sections II, III and IV of the Proposal). These will provide clarity as you move into selection of OD consultants.

Work with your OD Coach to identify 2-3 potential consultants. Review the resume and client lists of consultants provided to you, and feel free to review the wider Provider Pool. Your OD Coach can help you think through questions that will determine the scope of work you will undertake. In some instances, you may consider a team of consultants to meet your organization's needs. Consider the pros and cons of a team approach with the OD Coach.

Interview more than one consultant. This offers you the chance to explore different approaches, techniques and skill sets to help you refine your understanding of the situation your organization is confronting, while simultaneously allowing you to compare the candidates. The OD Coach's role is to provide accountability to a thoughtful selection process, ultimately the choice of the consultant is up to the organization.

OD Provider Network

The OD Coaches have identified a pool of skilled and experience providers, colleagues with a demonstrated commitment to working with social change organizations within a movement building framework. OD Coaches will be making suggestions of providers in the pool whom we believe to be a potential match with each organization. Organizations are encouraged to consider these consultants, and may also consider consultants who are not in the network. Your feedback about your experience with the consultants in the network, positive and critical, will help to create a strong pool for future cohorts.

In building the provider network, we have tried to identify colleagues who will invest their expertise and creativity into the development of the OD component as well as the success of the MEV initiative as a whole. Feminist and intersectional approaches are key to the MEV theory of change and philosophy; so we looked for provider whose practices reflect these values. Providers in our network have a systems approach to OD work and an expert understanding of the particular challenges and needs of social change organizations of varying scales. They bring a commitment to working as members of an emergent community of practice, and deepening their own work through reflection and collaboration. Providers are expected to charge reasonable rates and provide good value to non-profit clients. Provider in the network all have the following skills:

- Experienced organizational consultant/capacity builder, including organizational assessment, executive coaching, strategic planning, leadership development, organization change, multicultural organizational development, and/or capacity building.
- Systems approach to coaching and organizational development; ability to work on individual, group and institutional levels to build capacity for social change.

- Knowledge of field of leadership development and organizational development in non-profit/social change sector; strong network of other providers and consultants preferred.
- Demonstrated ability to work at the intersections of race, class, gender, sexual orientation, (dis)ability, and other social identities in the context of organizational development.
- Demonstrated ability to team and work collaboratively.

5. Interviewing Consultants

The goal in the first few discussions is to determine if the consultant is a good fit for your organization and for the task at hand. Try to define the challenges your group is facing; describe the background, expertise, and services you're seeking; and characterize the kind of relationship you want to cultivate with the consultant. Try to envision the timeline. Use these conversation to practice articulating the issues you want to address, the scope of work and the timeline. (The OD Coach can also help you with the initial task of defining the work.)

Even though your thinking may evolve as a result of the interviews, try to ask each candidate the same questions so that you can establish a fair standard for comparison. As you interview possible consultants, pay attention to their specific answers and to their personal manner and professional style. Watch for things such as listening skills, insight, objectivity, cultural competency, and an ability to communicate clearly.

Finding the right consultant is a balance of art and science. Tangible factors such as expertise, background, and experience are key; but so are less tangible factors like rapport, intuition, and chemistry. The right consultant will be someone that you trust to challenge you and the organization to work on your learning edge, to experiment with new approaches, and to engage in difficult discussion.

Typical Agenda for Your Interview with the Consultant (allow about one hour for the call)

a) Share background and goals of the project

- Explain your job title and role in the organization.
- Review the Project Summary
- Describe the project expectations, goals and timeline.
- Outline the history, symptoms and causes of the issue at hand. Use the Overview of Organizational Needs to share the process of prioritizing this issue. Why now?
- Describe any other current or previous consultant involvement with these issues.
- Explain what you have tried and what ideas need more attention at this time.
- Answer the consultant's questions about the organization or scope of work.

b) Review the consultant's experience and approach

- Review the consultant's resume, client list and familiarity with the field.
- Ask the consultant what s/he perceives to be her/his strengths & experience relevant to this project. What is his/her gift in the work? What creative ideas or processes does the consultant recommend using in this project? Listen for any insights the consultant offers.
- Ask the consultant to describe an unsuccessful experience s/he may have had and what s/he learned about the practice as a result. Share any unsuccessful experiences the organization has had with consultants and what you learned. Or share what worked and why you think it worked.
- Determine if the consultant has an understanding of the cultures present in your organization. Is there an awareness of the ethnic traditions, race, social dynamics and world perspectives that are represented by staff, clients, board members and other stakeholders?

c) Clarify next steps

- Explain your internal process to the consultant, including when and if you will be checking references and when you expect to make your decision.
- Find out if the consultant has time to meet the goals of this project on time.

6. Check consultant's references

All of the providers in the OD provider pool have been vetted by the OD Coaching Team. However, you may wish to check references to ensure that you make a good match in terms of skill, sensitivity, and experience. In each case, call the person who supervised the consultant's work directly (which will usually be the Executive Director or a board member). Consider asking for a full client list to see the breadth of their work. You may want to check in with clients who are not on the consultant's formal list of references.

Guiding questions for references:

Ask references what impact the consultant's work had on the organization. Begin your talk with an open-ended question related to your project goals. Open-ended questions are questions that cannot be answered with a simple "yes" or "no." For example:

- We're thinking about hiring "Joanne Expert" to train our board in fundraising. I understand she did some similar work for you. How did that work out?
- Did the consultant quickly grasp the needs of your organization and its underlying challenges?
- Was work completed on time and on schedule? Did the consultant work at an appropriate pace?
- Did you reach your stated goals?

- Were changes in the goals or work plan properly negotiated? Can you give any examples?
- How did the consultant's actions affect the board and staff?
- How did the consultant treat you, your staff and your board? Did people like and respect her/him?
- What do you think are the consultant's best qualities? What limitations or challenges did you experience in your process?
- Would you hire the consultant again? Would you work with her/him differently?

7. Select the consultant

When you have identified a consultant who you think will be a good match with your organization and needs, you will finalize the proposal to NoVo and submit it by April 2. The proposal will include the name of the consultant, and some information regarding proposed scope, timeline and budget.

You should contract with the consultant following the foundation's approval of the OD Proposal. The OD Coach should review the contract with the consultant. From that point on you and the consultant will develop your relationship directly. Your organization has the right to adjust the scope of work and direction of the project according to your needs.

The OD Coach will check in occasionally with both you and the consultant to make sure things are progressing smoothly and that you are satisfied. The OD Coach may offer guidance to you and/or your consultant to support the achievement of your capacity building goals. Feel free to contact the OD Coach at any time if you have questions or concerns

8. Produce a written scope of work with the consultant

Generally after the first or second visit, priorities are established, and the goals and the structure of the consulting relationship become clear. The consultant will take the lead in drafting a scope of work, which is reviewed, revised and approved by the organizational liaison and the ED. Discuss the scope of work and any revision with the OD Coach.

A scope of work should include:

- The goals of the project or results you hope to achieve (against which the consultant's work will be evaluated);
- Quantifiable parameters such as the number of people to be interviewed or the estimated number of meetings;
- A work plan outlining the likely steps at which progress will be monitored, the overall proposed timeline, and the responsibilities of the organization and the consultant in meeting the project goals;

- An outline of the technical and human resources the consultant will need to complete the work, like mailing lists, historical documentation, financial information, or staff and board time and participation;
- A list of the work products or “deliverables” the consultant will produce, such as a strategic plan, written report, summary of research findings, meeting agendas, or employee handbook;
- A written agreement regarding joint or separate ownership of any work products. For example, if the project will draw from a training curriculum, templates or other resources that the consultant brings into the project, clarify whether these will remain the property of the consultant. Items created specifically for this project might remain the property of the organization; and
- A statement of the projected hours and costs. If costs are estimates, the contract should state terms under which the consultant can exceed the estimates.

9. Getting started with the consultant

At the outset, it will help if you provide the consultant with background materials. The OD Coach is available to help with the engagement of the consultant. Consider how to build on the OD Assessment work to help the consultant understand the life cycle issues and development issues in the organization.

Background Documents

- The proposal for OD/Capacity Building support
- Materials from the OD Assessment, including CCAT and ACCAT reports, consultant reports and other notes
- The organization’s mission statement and any current public materials
- A Board and staff list, and chart of relationships
- The current budget, financial statements and tax return from the previous year
- Any documents related to the consulting project
- A sample grant proposal about the organization’s programs

The most important goals of your first face-to-face visit with the consultant are:

- Get to know one another,
- Begin to build trust,
- Orient the consultant to the organization and it’s people. Help the staff feel comfortable with the consultant. (Being clear about expectations and timeline will help the staff and any other stakeholders involved to feel comfortable.)

If you are working with a consultant long distance, consider dedicating one to two full days on-site for the first visit. Structure the time so that the consultant and staff begin to get to know each other. (If the work is local, you can spread these visits out over time).

Even if another person is identified as the primary liaison to the consultant, it is imperative that the Executive Director be involved with the initial meetings, the development of the consultant work plan and the scope of the work. The Executive Director also needs to genuinely champion this work with the rest of the staff and board, stressing its importance and the organizational commitment to the process; and the ED should be in contact with the consultant to check in from time to time.

First Working Meeting with the Project Team or Committee

1. Introduce the consultant and briefly review his/her qualifications and experience.
2. Review the project goals, timeline and major project steps (the timeline and next steps may get more detailed and formalized over 2-3 meetings/discussions).
3. Review background information related to the issues at hand.
4. Clarify the role of the liaison to the consultant and other key staff roles that will be important to the success of this project and the planning team.
5. Clarify decision-making processes.
6. Ask your consultant about how s/he manages confidentiality regarding sensitive discussions.
7. Discuss the role of the OD Coach and how to include/build upon your work in the assessment phase.
8. Outline any homework to be done between meetings, including documents to prepare or share.
9. Establish best ways to communicate (email, phone, conference calls, etc.).
10. Set a follow-up meeting and key agenda items.

10. Manage the consultant relationship throughout the project

It is vital that you maintain regular communication and check in on the progress of the overall project and timeline with your consultant. Build a relationship with the consultant characterized by open, honest discussion and reciprocal feedback. Withholding of knowledge or opinions by either party will reduce the potential benefit to the organization. The team liaison's role is critical to a good partnership.

Tips for Managing your Relationship

- Within a week or so of each team meeting, review what progress was made, whether there were internal dynamics that require attention, follow-up tasks to assign or remind people about.
- Discuss emerging issues or changing conditions.
- Decide on next steps – confirm meeting dates, homework, etc.

- Check in frequently to make sure the project is on schedule and that tasks are being done to your satisfaction. Review the scope of work, timeline and billable hours on a bi-monthly or quarterly basis.
- Talk through concerns, questions, and problems as soon as they crop up.
- Remember the meter is running on the funds allocated for your project; use the consultant's time wisely. Show up on time. Don't reschedule meetings at the last minute. Do your homework.
- Make time in the final meeting to do an evaluation with the consultant.

The OD Coach will be available as a resource to ensure that the relationship is going well and that the organization's needs are being met. She will check in with the organization and the consultant during the project, and you should feel free to ask for guidance as needed. There is no magic formula to ensure that you find the perfect consultant and that they perform to your expectations. Attention to the key elements highlighted above will help you achieve your goals, hire the right consultant at the right time for the right reason, arrive at agreements about the scope and goals of the work, and manage your relationship with the consultant(s).

Acknowledgements and Resources

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Original Acknowledgements

This article has drawn upon the experience of the French American Charitable Trust's Management Assistance Program and excerpts from the following sources:

["Working with a Consultant or Technical Assistance Provider: A Resource List"](#) This listing from the Foundation Center provides consultant directories and tips on hiring and working with consultants.

[Succeeding with Consultants: Self-Assessment for the Changing Nonprofit](#) By Barbara Kibbe and Fred Setterberg, The Foundation Center, 1992.

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