

Succeeding with Consultants Focus Group



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[Start of recorded material]

Facilitator: I want to start with the area of finding consultants. Have you recently encountered any challenges finding consultants that met your needs for a project that you were conceiving or at least considering?

Don't have to have, but if you have, I'd like to hear about any challenges you might have had in finding appropriate consultants.

Male Voice: [Unintelligible].

Facilitator: Anyone want to --

Female Voice: Could I clarify -- one of my recent challenges was trying to find a new insurance broker.

Facilitator: Yeah. No.

Female Voice: That wouldn't --

Facilitator: Yeah. No. We really are thinking of sort of discrete consulting projects that you would think of as a consultant, management consulting, organizational development, fundraising.

Female Voice: Like PR?

Facilitator: Yes. PR.

Female Voice: Okay. [crosstalk] So I just needed to find a good public relations company. And I really had to depend on the Internet. I had to go through, and I picked the top 11. Some sorted me out because I was too small.

[laughs] And then, [through] initial email and then phone conversations, I whittled it down to two and presented it to the board, and we picked one. But there was no place I could go for personal references, which was difficult. [crosstalk] [That's my first preference].

Facilitator: So you just organized your own search.

Female Voice: Yeah. I prefer to hear through others that I network with. You need to go with so-and-so because they did great with me. Or don't touch this group with a 10-foot pole.

Facilitator: Mm-hmm. Okay. Other thoughts on finding consultants? Any challenges or concerns in the process of finding one?

Male Voice: To your original question, I would answer no. I mean, ultimately, we found, for all the projects that we've put out RFPs for, have

found a bounty or at least a few qualified folks who were sort of within a price point.

I think the challenge is really putting together a good RFP, vetting it, going through it, checking references. So if that's a further question later on, I can answer then. But I think it's more so trusting -- finding the people who are going to say something negative [laughs] about a bad experience.

There's no Yelp for non-profit consulting. So you have to dig a little deeper because -- it's just like hiring a good staff member too. But --

Facilitator: Mm-hmm. Mm-hmm. I want to welcome you, [Margo].

Female Voice: [Sorry.] [crosstalk]

Female Voice: I'd like to [answer].

Facilitator: Please. Go ahead.

Female Voice: We have a very small budget. [We're a new] organization, four years. I helped start the organization. I don't have any experience as an executive director. I was a graphic designer by trade originally. But the mission really moved me, and it's just kind of carried me.

So we're at a point where, if I need anything done, our budget is so small that we're asking so little that people don't respond. We're

lucky to get some people. And we kind of just [end up] with them. And we've been lucky that those people have been fairly trustworthy [unintelligible].

But that's our biggest challenge is that we're offering [\$35] an hour instead of \$70 an hour program writers or something like that. Then, we'll see how they pan out. So far, I've had one woman on staff for a year who started at 10 hours, then 20 hours.

She just keeps taking on more and more stuff. But she's like an angel from heaven. I'm not quite sure how I landed her as a consultant. But yeah, I wish I could pay more.

Female Voice: I think, for us, the most recent -- it's actually looking for an executive coach, which I have found to be really challenging just given kind of having to figure out fit and like who do I go to actually get some feedback.

So I find that I'm going to colleagues who I think -- I mean, they're going to give -- they're sharing their kind of circle of people. But I really need to find other executive directors that have worked with those people that feel like they're like minded.

So I think that's been really challenging, and they cost a lot of money. So [we have to be] really sure. Yeah.

Facilitator: Mm-hmm.

Female Voice: [We have] a couple of examples. One, I wanted someone to train us in public speaking because all my staff has to do public speaking. We did an Internet search, and I've never done an Internet search for a consultant before.

But we did, and we found this great guy and vetted him. We don't go out to bid necessarily unless we're doing a big contract. Like our strategic planning, we went out to bid because it was a \$50,000 contract.

But these are smaller. Training is \$2,500, \$3,000. We don't go out to bid on it. We're just -- so that was a new one for me because I don't think I've ever hired any consultant that I didn't know in my career. I mean, as I got older, I knew more people. [laughter]

So the network of consultants that I know is pretty extensive. And I wouldn't normally hire anyone I didn't have a personal reference for or referral to. But in this case, we got a great guy.

I was very surprised. My staff did the vetting and looked at it and came in with it. I was like, okay. Cool. And we're using him now repeatedly. And he's a for-profit guy. He's not a non-profit consultant. He teaches -- it's called method speak. And he teaches public speaking to a whole array of audiences.

Facilitator: A follow-up question there is I wonder if we're making, either consciously or unconsciously, a distinction between whether something really is, in our perception, sector specific, how important sector insight would be in something like public speaking versus strategy or fundraising obviously or something like that.

Or do you think it was just, this time around, you just took a different -- [crosstalk]

Female Voice: I think it does matter. But in this case, it doesn't. I mean, as long -- you know, the elevator speech for [build a dream] is the same -- I mean, is not -- it's just an elevator speech for [build a dream]. It could be Proctor and Gamble, you know.

I don't think he needs to have particular insight into the non-profit world to be able to do that. But that's not true of other areas like an HR consultant. I had the experience of using an HR consultant who wasn't from the non-profit world. And it was a very different experience than the HR folks that I've worked with my whole life. Yeah. It was kind of a translation [how to go on].

Facilitator: So we've heard two Internet stories and people we know, colleagues. If you think back very specifically, for those of you who have hired consultants over the last year or two years, what are the most typical sources of referrals?

How are you finding these names? [I mean -- or your online search] story. How do you typically -- who do you go to? Yes.

Female Voice: [I didn't get to read here.] I've done through colleague referrals, through networks and then also by enrolling in programs. I think my first experience with a consultant was when the San Francisco -- the business commerce --

Facilitator: Mm-hmm. Chamber of Commerce.

Female Voice: Chamber of Commerce had the art program or consultant program. I don't remember what it was called though. Do you recall what that was called?

Facilitator: I don't. But I know what you're referring to. Yeah.

Female Voice: In that case, we had to apply for a program to be matched with a consultant. That was my experience at -- that was my first coach. I kind of just -- so I evolved from getting what I get to getting scopes of service and getting things kind of written down and looking at the matter of price and reputation and then whether I can get something from a colleague.

But I'm part of a women's executive director group here based in Oakland. But if you haven't heard of the [Minervas]. It's open to any women executive directors as a peer support.

Female Voice: That's great.

Female Voice: [Unintelligible] or --

Male Voice: I'm okay with that. [crosstalk] [laughter]

Female Voice: It's a peer support. So a lot of questions go out there about consultants and getting information. And do you know anything about this consultant? Or I'm looking for this. Does anyone have recommendations?

I've certainly shared resources that I've come into contact with and shared that with other directors. So peer colleagues and then referrals. We had a situation on our board where we were having some conflict and was looking for a board development consultant.

One of our chair was a board governance consultant. And we needed help. So I ended up calling [Jim Sacho] for a referral.

Female Voice: [A need to go] -- [unintelligible]. [laughter]

Female Voice: Go another level to find a board consultant to help us with our chair who was a board consultant. [laughter]

Female Voice: That's pretty funny. [laughter] [crosstalk]

Female Voice: But colleagues and online and --

Female Voice: We have tried also places like -- I mean, I don't know if I would do this again -- but like [Taproot] so where there are these proposals. And then, you get a whole team. But that has actually not been the most successful avenue for us to go. But that's been another place that we've gotten consultant support.

Facilitator: Anything that hasn't been mentioned?

Male Voice: I would say one thing that I don't -- as I'm looking at all the folks we've hired over the last two or three years, it's never been anybody who approached me at a conference or who cold called or -- they might make a list that we would send an RFP out to. But I can't think of any on that list who came through that way.

It's usually -- I call three, four, five executive directors that I know, bring in a couple others [and a team], and we'll sort of talk through it or do an Internet search as well.

Female Voice: I guess one thing I would want to say is that the network of colleagues that give referrals, for me, it starts to end up to be a certain age. So for me to try to get access to younger consultants that are coming up is really hard for me because I don't have the occasion to interact or get referrals from my colleagues because we're all getting old.

And we're referring us oldsters to each other. That's not particularly what I want, although we're terrific. But I would like to have access to a wider pool. It's hard for me to find that, to get connections there.

Female Voice: We have the opposite problem. [I feel like] all of my colleagues are max like 45. And we actually do want people that have been in the field [laughter] longer and have more experience. But we don't -- like those circles -- [crosstalk]

Female Voice: Yeah. Really.

Female Voice: Like where are those people? So yeah. [crosstalk]

Female Voice: Well, you're in the youth development.

Female Voice: Yeah. [crosstalk] There's a lot of 25-year-old consultants in these -- [crosstalk] [laughter]

Female Voice: That's very [funny].

Female Voice: Yeah. So --

Female Voice: Great.

Female Voice: There are some events that we posted with [Salesforce]. And we ended up getting a team of [Salesforce] pro bono. [Really huge one

for us]. And then, Coming of Age is a non-profit in San Francisco that connects 55 and older people to opportunities.

Most of them are volunteer opportunities. But some of them are [unintelligible] opportunities. And we've had a woman come through up there to do [unintelligible] for us.

Facilitator: Okay. I'm going to move us to screening consultants. You've alluded a little bit to this in your stories. But just to focus in on that process, when you think back on how you've done that, how rigorous do you think you've been? You know that it's -- a lot of this is personal relationships or networks.

But as you would define the rigor in selecting a consultant for an important project, how rigorous do you think that you've been in selecting consultants as a habit?

Female Voice: Well, for the public relations people, their proposals were very telling. Some told all about them and how wonderful they were. You could tell they've done no research on us. And the ones that stood out, you could tell they had really gone through the archives because we are a 40-year-old agency. We've got some history out there.

It's not hard to find anything on the Internet if you know how. And then, the group that won -- in fact, that's who I was meeting with right before I got here. We had our first meeting.

Not only did they present to us what our history had been -- and it was accurate -- but then they had put together a comprehensive plan of where we could go forward. And they gave that to me in the proposal before I chose them.

So I felt like they were really putting their neck out in a way that I could just really lift their ideas. But also, the head person continued to talk to me the whole time instead of deferring someone else. So it made me feel like I was important.

She also said, "I have personally been following your agency for the last 20 years. My kids grew up with some of your older siblings." So you put all those -- so that gave me that personal connection that I would have usually liked to have gone for first and not just the cold call off the Internet.

But it was a combination of all of those. And after meeting her today, you know, having our first big meeting, I feel like she is what she's presented so far. I sure hope so. Also, she gave us a huge discount because she said she has a heart for non-profits. But she doesn't specialize in non-profits.

Facilitator: Thank you. [Any thoughts] on the rigor [of training]?

Female Voice: I wish I did -- was more. It's like the same with staff recruitment. You know, there's a kind of desperation --

Female Voice: Always. [laughs]

Female Voice: Of needing help and needing help now. It's taken me 10 years, and I have the best staff team ever.

Female Voice: Yeah.

Female Voice: But I've had to learn. So that's kind of balancing over. Then, we've worked with a lot of pro bono consultants in support. And then, that opens a whole other kind of problems with communication. But screening in terms of needing help and [me] having super limited resources, it's very rare that I can pay for a consultant.

But then, I still find myself where I got one scope of service on a project that needs to be done by the second week of March right now. It's like boom. And I'm going to have to navigate that one because it's known. And known is better than unknown even if there are problems.

Female Voice: Yeah.

Female Voice: Mm-hmm.

Female Voice: That's interesting.

Female Voice: So we pick and negotiate similar to the housing where you're not going to a competitive bid. You're going for qualifications. And then, you negotiate from there. On the strategic plan that we did, which was a complete failure -- [crosstalk] when I first got to -- yeah. It was.

It was a result of my board when I got to [unintelligible], but that's another story. We went out and competitively bid the -- it was a \$50,000 contract. It wasn't insignificant for a strategic planning and -- we did a very intensive vetting process.

That's probably the only time we've done that. Everything else has been, what are the qualifications we want? Also, the contracts have been smaller except for -- even with our -- we go under very large contracts with -- and that's a qualification, solicitation and then negotiation.

Everything below \$50,000, we're just -- we don't do rigorous vetting because, literally, below that, I know everyone that was hired. So one could argue that there's not enough competition, you know, that I'm basically handpicking consultants.

But the dollar amounts are not that great to warrant the staff effort [there] in my opinion unless there are political reasons to do it.

Female Voice: Interesting.

Female Voice: We've done it s -- only one RFP. And that was because it was [partnered] with the city, and I have to do competitive bidding. But everything else has been like, you know -- put out a call. Whoever responds, you meet them, see if they sound good. You're hired. [laughter] For the consultants. I mean, we have a better process for staff. [laughter]

But I do meet with them personal. We get a feel for their personality and how we would interact with each other and be clear about us being a small, slightly disorganized organization -- disorganized organization.

Then, if they're okay with that, I feel that they're going to roll with it. And that's -- and it feels good to just be able to hire someone like that. I know some other executive directors have to run everything past their board. I feel fortunate to just be able to do that.

Female Voice: I'm interested in a project story of you getting into a project and realizing that you really didn't have the right person in the role and how you might sort of reel that back and associate it with the screening or vetting process?

Or do you not, as kind of you just said, which is actually -- you know, it was the board, not the -- I don't know. Like have you gotten into a project and realized, had we perhaps done a more careful scoping and vetting and screening of consultants that you wouldn't be in this situation?

Female Voice: I was going to say I think, for us -- so our hiring process is super rigorous. And because we serve young people, they're involved in all of the hires and have to kind of get final endorsement.

So when we didn't apply that same framework to the consultant who was going to be working with the larger staff, I actually felt like we made the wrong decision and had to kind of pull back and say, this isn't a good fit.

But it's interesting because I feel like, in some ways, the rigor of staff is so big for us and even for me like -- I don't know if it's like getting a little bit lazy. But I don't put -- I haven't in the past put that same rigor for a consultant even though, for some consultants, they're getting paid more than our line staff really for the amount of work that they're doing.

So I think we've had to really adjust that. I think even figuring out, once the consultant is hired, like [what are the] midpoint evaluation with the consultant to see if we're still on the right path because, even with the current consultant we have, like we've had to readjust because they were the right fit. But they're no longer the right fit.

So yeah, I think all of those -- but we have that same process for staff. It's just like, wait. Why is it taking me so long to realize I should have that same process for consultants. There's a way that

consultants get a little bit off the hook I think. I don't know. That's just my feeling.

Female Voice: [Unintelligible].

Male Voice: Yeah. I would say, four years ago, we hired a consultant in desperation in the midst of a merger when desperation was like, you've got to get somebody. And it was a PR consultant actually and was just an utter failure and a complete waste of \$25,000.

Female Voice: Wow.

Female Voice: Ouch.

Male Voice: I'm a little bit over exaggerating. But it's pretty darn close to an utter failure. And that was when our rigor really started. And we have been quite rigorous since then and not just saying, we need this so desperately we have to just go with the most likely warm body that fits.

Facilitator: Okay. We got seguewayed a little bit into evaluating consultants and appreciate this analogy to what's your framework for bringing people into a system period, which is really interesting. So maybe somewhat analogously, what's your framework for evaluating consultants who don't report to you?

You're not their supervisor in the technical HR sense. Have you had experiences that you think are -- that work in terms of really staying on track and being an open dialogue about how a project is going? Or is that very rare? How do you think about giving feedback to consultants and evaluating consultants as the work proceeds?

Female Voice: I feel like it's rare in my book. I certainly have my own assessment and evaluation. And then, it's almost like it's too late. Like if it wasn't a good fit -- or like in the case of -- even if it's someone referred by colleagues or so, someone who has a really, really good reputation -- I talk to other consultants.

And they're like, that one is the best for that purpose. And then, three quarters of the way through, I'm realizing this is not a good fit. Clearly, this is -- and then, we're like finishing, and we're limping along to finish. That's been really hard.

But I find that, even with the spectrum of consultants we've worked with, whether it's pro bono or still very modest fee based, I get the - - I don't want to call it the power dynamic of the relationship. It's like the one -- it's one of those -- it's tipped in awed --

I feel like I haven't totally asserted myself as the executive director because I feel like I'm at the whim of the consultant. And when the consultant is doing something, you know, it's very hard to -- you know, they'll say they need support, and they need this and this.

And I'm thinking, whoa. We're paying you to support us. And it's like, we have to redefine the roles and responsibilities. We're way too far down the road or something. We've struggled with that. So we haven't had that.

But I certainly know when it clicks. And I'm thinking, uh-oh. And then, I have to navigate a different way. I'm learning not to put myself in these situations. But it's slow going because we need help. And there is a certain flexibility sometimes when it's just like we want to make the best of the contributions.

It's like the mantra: everyone has something to contribute.

[laughter] Like that's what I've learned from staff or board because I [always -- I'd be] like, "They're useless." Or like that bo -- you know, so I have to not go there. Everyone has a contribution to make. [laughter]

But I feel like the power dynamic sometimes with a consultant gets skewed. Then, all of a sudden, I'm not the executive director. Like with my staff, it's my call. But with the consultant, it becomes -- it can be funny.

When it starts getting funny is when I'm going, uh-oh. It's not working. And then, we just have to somehow get to a point where we can close it. It's uncomfortable.

Female Voice: Mm-hmm.

Facilitator: Any thoughts on evaluating as you go? Feedback loops to consultants?

Female Voice: It's important. I agree it's uncomfortable. I think that the consultant that we're working with now, I mean, having that -- that's the other part too is technically -- when a consultant is technically doing what you need, but the culture that they're bringing and their personality or attitude actually clashes, those are really hard conversations to have.

But I've had to have them. Like look, you are working for us. We are working with people that are new to the field. You are talking jargony and then making people feel stupid. You're doing a great job over here like just getting the deliverables done.

But that piece of like -- you need to change it, or it's not going to work. I think that's where the evaluation has been -- that's the hard part, but it's been really important especially for our agency. I mean, culture -- that's -- the culture fit feels like the number-one requirement in order for a consultant to succeed.

So I have had to have those. And we are shifting relationships because of it. But -- yeah.

Female Voice: Mm-hmm.

Male Voice: I think we do a good to very good job doing those evaluations and course corrections. And two comments to make. One is, usually, we play good cop, bad cop. And I'm always the good cop. [laughter] But we've got some really bad cops in our organization, you know, who are very good at being like, "You know what? You're just totally off base on this. And we're spending --"[laughter]

You know, because some consultants, you're paying well into over \$100 an hour. If they're not spending that time wisely, then they need to hear it. So I think we do a good job of it.

To the extent that -- this is probably for later. But I don't think I've ever had a financial change order with a consultant.

Female Voice: Wow.

Male Voice: Like we wind up having them work, in my mind, 20 to 40 percent more hours than they anticipated working and never have said, "You're going to have to pay \$5,000 more," because we try and really get that scope of work down in advance and just say, "You didn't deliver on it. You have to deliver on this final product."

Again, it's from having a really bad experience that made us have the rigor. So --

Female Voice: I think the way that we've handled it is -- I don't necessarily think of it as evaluation but that the contract work is set up so that there are

regular check-ins and feedback built into the contract. So we start off.

And if the consultant is any good, they'll initiate this. But if not, I'll initiate it, which is, okay. Here's the scope of work. Now, we're going to check in in one week, two weeks so that we have a regular period where we sit down.

And they say, "Am I on track? Is this the way to go? Here's what I've done so far. What's your feedback?" Get feedback from other people. So it's build into the contract that that evaluation of the work is ongoing.

So I don't hit the place where I have to fire somebody off a contract or something, you know, where we end up massaging it to where we want to go, kind of collectively. It's been a long time since I fired someone off a contract.

Facilitator:

We found in the survey that a large number of, again, sort of discrete consulting projects, like strategic planning or board development or fundraising planning, did not conclude with an evaluation, whether that was a preset in the scope or work, like a survey or an interview with a consultant or a debrief.

So I'm just w -- that actual specific endpoint in the last sort of management consulting, broadly defined, experience that you had that has come to a conclusion, was there a -- we are now having the

evaluation meeting or survey or whatever the methodology may have been?

Female Voice: That makes sense to me that that evaluation is not there. Like I said -- I don't want to repeat -- that power dynamic, how it shifts. But it's like, I tell my staff, when we're working in a partnership or we're working on an agreement or someone is coming to us for a service or to participate with us, we always use our contract because we had some problems.

Someone signed someone else's contract. It was like, no, no, no. Those aren't our terms. So it's our contract. And with a consultant, it's their contract. And that's then part of the con -- almost like it creates confusion of that role in some way because we know what our terms -- we know what our process is.

But they come with a different kind of culture within themselves and fitting that. But I know -- like I'll tell friends, you're heading in -- you're getting a new roommate. Make sure you have your check-in times on a timeline, like already prescheduled. So if you have a problem, you've these moment --

I do it casually but not with this really formalized structure. I have to stop. I have to just assert that or insert myself into that. And even if it's their contract, since it's their terms of what service they're providing, we have to make sure that it's there. But it's one of those things I have to bring to it. But it makes sense -- [crosstalk]

Female Voice: [Yours didn't end with one] -- the one you're thinking of [unintelligible]?

Female Voice: The strategic planning one didn't. We use consultants to help us facilitate a lot of trainings and retreats. And we always do evaluations that include the consulting work after that. I haven't done evaluation of a consulting project in a long time. I can't remember it. [laughs]

Female Voice: I think the only way that we currently give feedback and evaluate our consultants is when we have our Camp Always, which is our one-week camp where kids that are adopted and their families come for a week. And the parents get training, respite care. And the kids get all the benefits of camp.

And we hire up to nine therapists, social workers, counselors. And then, we really ask the parents for feedback on how the camp was but also how those counselors were and anybody else who we might have hired.

Like we had a drummer that was very popular. But the feedback on him came back that he made too many sarcastic remarks to the kids. His drumming was great. He called me up this week. "I'd like to come back again." I thought, hmmm.

So we have a hard conversation, and I monitor his mouth for a whole week? Or do I just hire him? [laughs] But I'm thinking that's our only checks and balances. But it would be very valuable. We always give our contract to the consultant.

They sign it. They have a contract. We'll sign. Or sometimes, we'll kind of revise to make them match. But I'm thinking you could put in there in your contract how there would be points of evaluation, right.

Female Voice: Yeah.

Female Voice: And they would agree or disagree.

Facilitator: Yeah. It's interesting that, in the survey data, those who did have it, quite a few of them found it to be a learning experience, not just a -- you know, I'm giving you feedback on whether you were a good consultant for us. But just taking that time [do you think of consulting as also] kind of capacity building, etcetera for the project reflection?

That's something that, I think, interests us about that too. It's not just rating the consultant. But how did this work? What do we learn for next time? You know, some of that learning that might be possible if we build those moments in.

I want to think about candor. You have mentioned the power dynamic and then sometimes being good at the vetting side. But do you feel like you're 100 percent candid with consultants? I get -- [laughter] what's the margin of error, I guess?

If we're all walking around, you know, there's a certain candor with a spouse. There's a certain candor with a coworker. There's a certain candor with yourself -- [crosstalk]

Female Voice: [Candid with]. [laughter] [crosstalk]

Female Voice: Even ourselves.

Facilitator: I'm trying to locate it [and make] conscious our -- sort of walking around correct -- what's the percentage of correction that we're sort of holding back, if any, in our work, again [particularly] with management consultants, strategy, fundraising or development, these kinds of process consulting? Do you find yourself being very candid whether informal feedback or as you go?

Female Voice: I know I am.

Male Voice: Mm-hmm.

Female Voice: Yeah. I mean I feel like that's kind of -- I don't know. I feel like I appro -- with consultants, it's like this is money that's for the young people we serve. It's my obligation to make sure every dollar is

going exactly to s -- like I have like this sense of like this has to be really good.

So yeah. I feel like sometimes I might be overly candid. But I try to be really honest. And even with consultants, we have a management team. So we'll debrief a meeting. And I will bring back to the consultant kind of the feedback from our management team and really working [to have to change].

I think it's important. But then, I also give the consultants -- I actually ask them to be candid with me back. So part of it is like my learning with consultants is how clear am I being. So usually, it's like -- it's not just about the consultants being bad or like not fitting sometimes.

I realize I'm so busy I'm not actually quite clear with what my needs are. So I've asked consultants to be candid with me. I feel like I can take it. Yeah.

Male Voice: Yeah. I think we're -- again, it's sort of that good cop, bad cop routine. We're clear it's a lot of money to go out the door. And if it's not serving the bottom-line purpose -- and then, they can't course correct if they are not hearing it. So --

Female Voice: Mm-hmm.

Female Voice: Yeah.

Male Voice: [We do do that].

Female Voice: Yeah.

Female Voice: I would like to validate what you just said there. Everybody thinks they're doing the right job until they're told otherwise. So really, if they're going off the mark, you need to get them back to it. But I'd have to back up what you said as well.

I feel tremendous responsibility every dollar spent. And there's a lot of pull on every penny. There's so many different ways to spend it. So far, I have been very candid. I haven't had any come to the end yet under my reign, you know, [like the] contract finished, which is exciting because I know how they're going to finish now.

We're going to have a little evaluation. [laughter] Just in the nick of time. [laughs]

Facilitator: Have you ever given a negative or even candidly mixed referral about a consultant to someone who asked you for that feedback?

Male Voice: Yeah.

Female Voice: Mm-hmm.

Female Voice: Mm-hmm.

Male Voice: Absolutely.

Facilitator: Were you given as the referral? No?

Male Voice: I mean, I've done that too. But one specific one where it's a board chair of another organization that's considering doing a feasibility study, and we used a company that we had great reviews for almost everything except one element of the work and really spent time thinking about talking to her, the board chair, about how to ensure that's not the case for them, that that one element is really addressed early on. So --

Female Voice: It depends on how well I know the person I'm talking to who's asking for the feedback because I'm conscious of the consultants being out there trying to make a living. And I'm going to -- I don't want to -- I have to be very careful with my feedback.

But on the other hand, I will give it but in a more guarded tone, I suppose, or a little gentler to someone I don't know. [laughs]
Somebody I know, I'll just say what's going on and what to watch out for or what to do if they want to do it.

Facilitator: Mm-hmm. Are there things that would -- can you imagine situations where you would feel like you couldn't be candid? What might get in the way of being candid?

Female Voice: With a colleague that you're giving a referral to?

Facilitator: Yeah. That someone asked you -- I'm thinking of using [Jean Bell]. She gave you as a referral. What might get in the way of you saying exactly why you wouldn't recommend working with me?

Female Voice: [Kath said] --

Male Voice: [Kath said] --

Female Voice: [Kath just trashed Jean Bell.]

Facilitator: Who is saying that?

Female Voice: The person that I gave a -- so I'm commenting on you?

Facilitator: Mm-hmm.

Female Voice: You don't want to hire NAME, you know, whatever. And then, that person walks out and says, "Well, Kath just told me not to hire the executive director of FIRM NAME."

Facilitator: Well, I was using my name as -- [laughter] [crosstalk]

Female Voice: [It could be the principal] of a consulting firm. It could be -- I mean, you know -- I'm just saying that's --

- Facilitator: But what's negative about that fact, that you having that opinion is now out there?
- Female Voice: In a public arena where I'm going to run into you all the time and these referrals go back and forth, I mean I wouldn't do it. [crosstalk]
- Male Voice: What [Kath] said about like if it's a close friend or a colleague --
- Female Voice: If it's a close friend, I would.
- Male Voice: You'd say, look, let's shoot straight. But if it's somebody else, you would --
- Female Voice: I would dance around it.
- Male Voice: You would give mixed reviews. I mean, you would not sell somebody -- I mean --
- Female Voice: I would dance around -- [crosstalk]
- Male Voice: I would not sell somebody -- you can read between the lines. And you can some things like, here are a few things just to be concerned about. But the tone would be a little bit more --
- Female Voice: Guarded or here's --
- Male Voice: Guarded.

Female Voice: Here's what really worked well. [laughter]

Male Voice: Mm-hmm. It's a small world. It's such a small, non-profit community.

Female Voice: It is.

Female Voice: I also feel like, when I have given -- because I have given sort of a mixed review. And I've been the consultants -- like they've asked if they could be a reference.

And I've kind of shared with them -- like I've called the consultant back and said, "Just so you know, this is what I shared. You're really good at this. I told them, if they want a touchy-feely kind of kum-ba-yah someone, that you aren't the right person."

And she was like, "Yeah. I totally agree." Like I mean, I think that it's knowing the consultant too because we have a certain relationship. But I usually just call the consultant back and say, "Yeah. Your reference called. Here's what I said what strong, and here's what I said didn't work." But --

Female Voice: That's nice of you to give that feedback.

Female Voice: Yeah. But I feel like, if I'm their reference --

Female Voice: You accepted to be the reference?

Female Voice: Yeah. I mean --

Female Voice: Can I use you as a reference? And you said yes.

Female Voice: Yeah. And I mean, I assume the consultant -- because I've been honest, like they will know like what has worked well and whatnot. I just think I've hired people like in the last like 15 years of being in [ED], that I wish people would have been honest with me. Like I wish -- [crosstalk]

Female Voice: Consultants or staff?

Female Voice: Both.

Female Voice: Both.

Female Voice: I wish they would have been in my shoes --

Female Voice: Well, talk about reading between the lines though because I was with a staff that -- I got a recommendation. And when things started going wrong, I went back to that and read it. And it was like, uh, everything was there in my notes. [laughter] But I didn't understand it.

Female Voice: [But then, he didn't warn you if you didn't see it.]

Male Voice: [You had confirmation by it] -- [crosstalk]

Female Voice: I didn't understand. So -- [crosstalk]

Female Voice: That's interesting.

Female Voice: Yeah. That was hard. I wouldn't have been able to read between the lines then. I mean, I've got more experience now, so I can do that.

Female Voice: Those a-has are hard.

Female Voice: Those concerns, I thought, if there's concerns, you know it's a different environment, different circumstances. You can work through some things. I didn't realize how heavy that was, that that's the counter -- that that's the watch out. Beware. You know, you didn't say that.

Female Voice: [Not real loud. Yeah.]

Female Voice: They didn't say that.

Female Voice: Yeah. [That's hard.]

Facilitator: You've talked about it's a small non-profit community. Is there a role or an influence that funders have in this space? Have you had any experience with factoring in funders either in the selection, the

screening, the candid referring, evaluating of consultants? Have they had any influence at all?

Female Voice: Is there a restroom I could use? [Off-topic directions]

Female Voice: [I've seen Zellerbach]. You know, they have the program through [Zellerbach] that, if you're funded, then you have access, that you can apply for \$1,000 of consulting. So I've gotten executive coaching and things like that through that.

Facilitator: Mm-hmm. So they have an influence on your access -- [crosstalk]

Female Voice: Access. And then, they made a recommendation.

Facilitator: They did. Okay.

Female Voice: Yeah. My program officer made a recommendation, so I went with that. And it's been a good resource over the years.

Facilitator: What about others of you that get money from philanthropy? [Any] influence? [No. Okay.]

Female Voice: I mean, there's some consultants that we just have to work with because it's the funders hiring the consultant to do like a field scan or, you know -- and they don't ever ask us what we feel about those consultants actually.

We, as a grantee, are just supposed to interact with their consultants. So that's a little bit different because we don't have the same kind of power. But it would be great in those instances if organizations have the opportunity to reflect on how the kind of foundations' consultants have come in to work with organizations.

Facilitator: Mm-hmm. Okay. What about boards of directors? How often have they been -- do they have any influence on who you select, how you might evaluate or handle and manage relationships with consultants?

Male Voice: I've written down like a list of about seven to 10 different consultants we've used. And I think, on two of them, we've used board members as part of the interview process, one for feasibility study, felt like that was important for a capital campaign and one for an integration consultant for a merger and had them f -- and most of the other ones I think are more staff specific. And we have not had boards engaged in the interview process -- board members.

Female Voice: I'd say, when it's something new -- like the PR agent was something new for our organization. So the board really wanted to be a part of it. I went through and vetted like [for] 11 down to two. And it was pretty obvious who was the best one because the second in line didn't really shine very much.

And then, they gave their authorization. But it was more of the [unison in] the role of expenditure that brought them in.

Facilitator: I want to move to, if anything, what -- if you just sort of thought large or small, what could be helpful in terms of supporting you or your staff in finding consultants that are a fit, both technically and culturally dealing with some of these issues of knowing their performance with others, etcetera?

Does anything come to mind that you could imagine being useful to you in the process of -- [crosstalk]

Female Voice: Makes me think of the evaluations for graduate student instructors and professors when I was in college. You know, there was basically a repository of feedback that students would do that was accessible by students only.

So it's kind of like, if you're an ED, you're in this pool. You've been vetted essentially. So your feedback can be anonymous, so then you can say what your -- because you know, it's like LinkedIn and things. It's all just positive, [laughter] you know. There is nothing bad on LinkedIn that I've seen.

Female Voice: But if you go to Yelp --

Female Voice: Well -- right.

Female Voice: You know, what you referred to earlier -- [crosstalk]

Female Voice: I think that there's issues with anonymity in open public settings, right, versus professional -- you know, where there's a sense of professional confidentiality. [I think there's] a totally different standard there. Anyway, that's the first thing it makes me think of because then I would be really candid of what did not work.

And I wouldn't feel like it's that small a world because it is a small world. And I'm not going to -- but it doesn't mean I can't objectively -- and, you know, there's another way of structuring about objective information as opposed to just subject -- you know --

There could be a process for that. And it's more like a repository of feedback.

Female Voice: That's what I was thinking of with Yelp. You keep it professional and private.

Female Voice: I wouldn't want to put anything on Yelp. I mean, [crosstalk] in something like that, I would still hold my -- a negative experience, [crosstalk] I wouldn't put it out.

Male Voice: Consultant, they could figure out who it was.

Female Voice: Yeah. I wouldn't put it out. But if I was just sharing information with you about my experience with a consultant, then I would be really candid about it. I would be. [crosstalk]

Facilitator: So the anonymity is from the consultants, not from your colleagues?

Female Voice: Yeah.

Female Voice: Right.

Facilitator: So if you somehow could create a space where it was executive to executive, you would be more fully candid and/or wouldn't even need anonymity necessarily? I'm asking.

Female Voice: Well, it would be good to get feedback, let's say, from an organization that's similar to mine. Right. Like how did they do in our specific kind of field? So that would take some anonymity away. I'd need to know, you know --

Female Voice: Or it could just be listing who has worked with that consultant before because that's the other thing. In employment, you see their employment history. But when working with a consultant, you only know the best referrals, the best recommendations of the people they may have worked with.

It's another way of potentially seeing where their crossover is. So I could go, we're in the same field. And I saw you worked with this person. So I'm going to contact you as a peer colleague and make a connection and try something like that.

Female Voice: I guess one of the things I wonder is how many consultants have you worked with that you just think -- when you would give an F to just like, don't go near that person, the worst ever.

Female Voice: [It's mixed].

Female Voice: Yeah. It's usually mixed. So I think, if I've worked with someone that I thought was just horrible and shouldn't be out there working with anybody, I wouldn't hesitate for a moment. But usually, it's the mix that makes it -- you know, they're good at this and not so good at this.

Female Voice: But in this context, maybe not -- [crosstalk]

Female Voice: Maybe not so much in that. You know, it's not usually like don't go near that person under circumstances.

Female Voice: Yeah. [crosstalk]

Female Voice: Yeah. Right.

Female Voice: Yeah. Right.

Female Voice: Doesn't usually -- [isn't usually that way].

Facilitator: So what does that mean for these kinds of -- you're saying that that lack of absolutes kind of mitigates the power of a tool potentially?

Female Voice: I wonder. I just wonder.

Facilitator: Mm-hmm.

Female Voice: Yeah.

Facilitator: Mm-hmm.

Female Voice: Could make it a little more challenging to describe the person and which capacity they really were shining and where they failed.

Female Voice: Is there kind of an online site -- I mean, I don't even know that -- where kind of the consulting firms or consultants are just housed? Like [Blue Avoca --] like is there any place where you could just go like --

Female Voice: Where they're just listed?

Facilitator: Across the board --

Female Voice: Yeah.

Facilitator: Across discipline, there have been attempts that have ultimately failed that are more kind of membership driven things.

Female Voice: Right.

Facilitator: But if you were to take a field approach -- of course, the problem is, where do you locate the -- who is driving the platform? Right. Is the platform --

But there's, of course, affiliations of consultants from [AFP] to all kinds of things that, were you to want to get a list, you could get a list. But this question of evaluative content or referrals or something as strong as a Yelp-like thing, where would the sort of motivation to put that up be? And who would maintain that?

Because what I hear you talking about is that it would need to be -- you would need to feel that the consultants on whom you have nuanced reviews, you don't want to be running into them in the street necessarily. I don't want to put words in your mouth, but that's kind of what you said,.

Female Voice: Mm-hmm.

Facilitator: So if these are ongoing relationships or even relationships [of] relationships, would that stop you from providing really useful narrative or ratings?

Female Voice: Yes. [laughs]

Male Voice: It's hard for me to imagine how -- so maybe I won't. I won't worry about the system. I will say that what we do to try and address some of these concerns is we don't go off of their list of referrals.

We look at -- [call] their client list and see, who do we have relationships with? And that's how we try and do our reference checks is maybe one of the references they provide and then others that they don't. And that's part of what we consider to be a best practice. I'm not sure --

Female Voice: Yeah. You never take the three that give you and just --

Male Voice: Right. Right. [crosstalk] And then, I would say -- you asked for other best practices or things that could be done. And I think maybe having -- these exist. You can find them. But what does an RFP look like for a feasibility study, for a search [for] this, that and the other thing?

What does the scope of work look like? But I'm always like -- I don't know where to go. I just look for a template and do a Google search and pull this, that or the other thing. So maybe it exists somewhere, and I just don't know that we're -- [crosstalk]

Female Voice: Do you mean like a toolkit of like --

Male Voice: Exactly. Like that's --

Female Voice: When you work with a consultant, these are the best practices.
Scope of service should include this.

Male Voice: Yes.

Female Voice: You should have a contract with a timeline, have evaluations. Look into it.

Male Voice: Yeah. Here's a Word document that you can download for it and adjust yourself for your own purposes.

Female Voice: Mm-hmm.

Female Voice: I don't even know how to say this. But there's also something about kind of the cultures of consulting firms or groups that -- like being able to distinguish those at the front end, so you're going to the right places.

And I don't mean this as any kind of judgment. So there's like a FIRM NAME consultant. And then, there's like a FIRM NAME consultant. Like there's just -- that's the other thing too is like sometimes people just don't have kind of the continuum -- like an understanding of the continuum of kind of different consulting and the cultures of consulting to be able to even know.

So then, someone could go to -- like that really is doing organizing and advocacy may come to FIRM NAME, may not be a good fit.

Like culturally, it just may be kind of clunky. Then, someone might go to another place and be like, I really needed some nuts and bolts and a different -- that r --

So then, bad reviews are happening. But it's because I don't think we have enough kind of, as a field, an understanding of like the nuanced ways consulting can support us. So I also I think sometimes consultants get just a bad rap because it just isn't -- like if you're new, like there's a lot of emerging organizations, grassroots organizations.

Sometimes -- like I've had this experience when I was coming up as an ED. They're like, go to FIRM NAME. It didn't work. I'm like, well, I'm doing youth organizing. FIRM NAME actually didn't feel -- like I didn't know how to access it.

But then, I'm like, this is what -- as I kind of emerge in the field, I'm like, this is what FIRM NAME can support. This is what FIRM NAME can support. This is what this individual consultant can support.

So I don't know if that answers the question. But I just think --

Facilitator: No. That's hugely important.

Female Voice: Like we're talking about evaluating [the talent]. But I don't even think we have a clear understanding of how the field of consulting

has emerged. Like for my generation, consulting is the buzz word to get out of the grind of this field, like being an executive director.

Like all my friends are doing it. Everyone is a consultant now. Nobody knows what a coach is. People say they're a coach. I'm like, "You're a coach? What does that mean?" [laughter] There's like a whole -- [crosstalk]

Female Voice: You want a coach.

Female Voice: Yeah. But then, there's like a -- there's a [coach's in] -- so there's people that are trained to be coaches. So the field has totally changed.

Female Voice: Yes, it has.

Female Voice: But where do we have anything that r -- maybe that's a report that I didn't read. But -- [laughter] I don't see that. Like I really don't. I think there's something missing.

Facilitator: Well, that's kind of what we're talking about here.

Female Voice: Yeah.

Facilitator: When I say tools, I don't only mean dropping three names, but I mean tools in the broadest sense or technologies in the broadest sense that, if possible, could help negotiate some of that.

Female Voice: I feel like, when you have like -- if you were to say have a list or directory of consultants, I know my own personal reaction is, when I've seen a former consultant's name on a short list listed through like a funder, I just seize up a little bit going, my gosh. I don't think they should be on this list. [laughs]

Female Voice: Yeah.

Female Voice: That's only true with one person. But I feel like, if you were to have a list and if someone was on a FIMR NAME list, then you run into that issue about the reputation and the vetting and --

Male Voice: Are you vouching [for them]?

Female Voice: But there must be some process -- [crosstalk] [laughter] but with a directory with an association, it makes sense because this is a member. And they're part of it for visibility. Like that's a different thing. But that's something to be conc -- [crosstalk]

Facilitator: I think you're absolutely right about that. You've mentioned LinkedIn, which it sounds like -- I think we all now get these 10-a-day, I've referred you. So that means you're supposed to -- [crosstalk]

Female Voice: I've endorsed you. I'm thinking, what am I supposed to do? Am I supposed to endorse them back?

Facilitator: Yeah. So there's that. Then, there's Yelp, which is kind of maybe all the way to the other extreme [in the] different ways it's used. If you think about other online tools that you use that might have some elements that are relevant to this conversation or these issues, are there other platforms, not necessarily for searching for consultants, I'm saying, but just other things that are useful to you in the online infrastructure that might have relevance or transferability on this issue?

Female Voice: I can't think of a tool specifically. But I'd like to be guided through the process. So what kind of consultant are you looking for? And it's this tree that branches me out. So if it's a coach, it's going -- [the] touchy feely or management. Or -- and I don't know how you, as the consultant, plug in where you fit -- [crosstalk]

Female Voice: Like a roadmap.

Female Voice: Yeah. Because, you know, I --

Female Voice: Angie's list of consultants.

Female Voice: Mm-hmm.

Female Voice: Right. Right.

Female Voice: [Right. Angie's list. Mm-hmm.]

Female Voice: Because being new to all of this, I'm learning a lot of new things today, which is great. Thank you. But that I would perhaps have a bad experience with a consultant, and it's largely due to me, me making mistakes --

Female Voice: Sure.

Female Voice: Me picking someone who was wrong from the very beginning, not communicating, not tracking, not saying here's what I'm expecting of you. And then, it didn't work out. Surprise. Surprise. I'm giving you a bad review.

Well, that's not exactly [fair to] -- I mean , I would certainly take that on myself personally because I want to improve. But other people may not. They would just bash the person and keep on making similar mistakes because they're not trying to improve.

But it's unfair to the consultants that have that kind of [unintelligible].

Female Voice: I have a question about -- is there any way to expand the pool of consultants that work in the non-profit arena? That would speak to some kind of a tool that people could opt in or something. But I feel like there is talent out there in the for-profit world that doesn't necessarily think about coming over to the non-profit side.

It would be interesting if there was any way. That's just a thought. I mean, we use consultants -- we don't use specifically non-profit consultants in our work. But that's just --

Female Voice: Mm-hmm.

Female Voice: In some of these areas, there are not a great number of people to choose from. There really -- if you look at board governance, if you look at organization development, if you look at best management practices, there's not a lot of people out there that I know of that I would want to work with.

Female Voice: Yeah.

Female Voice: Yeah.

Female Voice: It's a very small pool.

Female Voice: I have kind of a question and a question for everybody. Is this area of connecting with consultants -- is this a matter w -- that's been like -- it's like some priority? Or are you exploring the idea of what tools would be needed or what resources could be made available as just exploratory? Or has it already been [vetted] as like a priority [of the] problem?

Female Voice: It's exploratory what to do about it. But several funders agreed enough that it was worth -- and not for us, the princ --

[unintelligible] but the principal is a woman named [Sheree Tang] -
-

Female Voice: Okay.

Female Voice: Who is connected to both [unintelligible] and the [philanthropy world]. So I think there is a perception certainly among the infrastructure and among philanthropy and among [capacity builders] themselves to some extent that this growth in the field has not kind of been matched with adequate structures for sourcing and screening and evaluating.

Female Voice: So then my question to this group is, I feel like -- I have worked with a lot of consultants. But I feel like it's still a pretty small number because of our resources. But it sounds like some of you have had much more extensive.

If you're putting out a contract for \$25,000, I'm like, phew. That's how much I can pay a staff person, right. So my question to this group is, if you've worked with a lot of consultants, generally have they been successful?

Like through our normal channels, right, has it been a problem for you? Or have the strategies you've employed actually been effective overall?

Male Voice: Yeah. I would say successful to wildly successful. It's always been -
-

Female Voice: That's amazing.

Male Voice: Almost always been a very good investment of money and things we don't have the skill set, capacity or b -- we do a ton of pro bono consulting too. But when we pay for something, it's because we have a specific need for that. I think we feel generally very good on the other end of it.

Female Voice: Mm-hmm.

Female Voice: Is that true for you too?

Female Voice: Much more successful in the more technical areas. So the more technical we get, the better the consulting is. The more -- I would not say wildly successful but okay, good enough [organizational] development, board governance and general management.

Male Voice: Yeah. To be more specific, like a search for a new senior level person, best money we've ever spent.

Female Voice: Exactly. Yeah.

Male Voice: In advocacy and lobbying in Sacramento, great money spent on doing that. Redo of Web site, great money spent there.

Female Voice: Mm-hmm. Right.

Male Voice: So those are the types of projects that I'm talking about that we did that we just don't -- we failed when we do it ourselves.

Female Voice: Is it that they're leading you with recommendations that you and your staff and your board have to make changes on so that they [might] --

Female Voice: No. I just don't think they were that good.

Female Voice: Okay. [laughter] So they didn't make good recommendations in the first place. It wasn't that the recommendations didn't work because -
-

Female Voice: Right.

Female Voice: [Capacity]. Okay.

Female Voice: I want to just run -- something that's opened up for me is we talk about risks and dangers and relationship management issues of critiquing consultants. But what if the repository was about projects?

Of course, you would name the consultant. But what if we went with the assumption that every consultant screws up sometimes or

turns out not to be the right fit and that really it's not about creating a database of rated consultants but rated projects of certain dimensions.

[We're] strategic planning in a social justice framework. I'd like to look at other projects under \$20,000 in the Bay Area.

Female Voice: I like that.

Female Voice: Yeah. [crosstalk] Then, you could synthesize it -- [crosstalk]

Female Voice: I'm not saying the consultant wouldn't be named. But you'd be coming at it through the project. So the locus isn't about criticizing necessarily or breaking down a person or building him up for that matter but saying, boy, when it was planning and I had to get it done for \$20,000 and we were a youth-centric organization, this didn't work. I don't know.

Male Voice: Let me share a -- I think, in general, yes. But I want to share one caveat to that. I'll use a very specific name. So Olive Grove Consulting did a feasibility study for us for a capital campaign. In general, very good work.

Then, I get a call from somebody who is wanting a reference check on them. Like, well, who are the consultants that are working on it? And they're not at all the same people. It's like there was one of the same five.

Female Voice: It's a challenge.

Male Voice: So it's like, well --

Female Voice: Yeah.

Male Voice: Take it for what it's worth. So if it's one of those consultants to a master consultant, that's a challenge.

Female Voice: Yeah. That is a good point. Mm-hmm.

Female Voice: Yeah.

Female Voice: Sometimes on projects, management steps in to make the project good when consultants can't.

Female Voice: That's very true.

Female Voice: So like the -- [crosstalk]

Female Voice: [That's always true].

Female Voice: Yeah. So then, it's like, well, is that a testament to the consultant? Or [they'll -- he just -- we're going to] salvage a project.

Female Voice: Mm-hmm. Kind of going into the finish line.

Female Voice: Yeah. I mean, that's the hard part with that.

Female Voice: It's even more difficult if you [go project] focused because there are so many different variations. And to do like an objective kind of evaluation, you'd have to like end up having -- you'd have to boil it down --

Female Voice: Yeah.

Female Voice: In a very generalized sense. And then, you lose maybe the nuance that you're thinking might be there. I think it's person based. I mean, imagine doing that for your staff, you know, by function -- organizational function and people fulfilling what they're -- you know, or in terms of like projects in comparison.

We don't necessarily do things like that. We look at the person and the team involved.

Female Voice: [The person]. Yeah.

Female Voice: We have five minutes. So I want to say if there -- on this whole topic of tools, we've talked about templates and process guides. You mentioned sort of what are the steps. What are in some of these key documents?

We've named some of the other kind of archetypes of online platforms. Is there anything else that comes up for you generally in this space of what could be potentially useful or relevant from another site or tool that you think, if we had one of these for consulting, you know, if we had X or Y, that would help us?

Female Voice: I mean, I realize that we needed to hire PR folks. I had no idea what the general scope of [unintelligible] [that you hire them] that you do it annually or three months, six months and what the [unintelligible] fees would be.

I only figure that out by [the level of] proposals coming to me. But if I had been able to see where -- you know, look. If this is what you're wanting to do with the PR, you want to get this, this and this done, [you should only contact] for about this long and expect a variance of this much to charge.

I felt like a tater tot talking to some of these folks. [laughter] You know, really, because I think --

Female Voice: [I'm thinking of] power dynamics. [laughter]

Female Voice: Well, you think -- [crosstalk] [email or phone] because I was sitting here going [well, I don't know.] I really don't know. [laughter] You know, it's kind of like when you take your car to the mechanic. [laughter] You know, I don't know. Does it run?

Male Voice: It makes this noise.

Female Voice: So I guess what I'm -- yeah, it makes n -- yeah. And then, you do a great example of that and get them laughing at you. So I guess what I'm saying is giving the ED some level of empowerment as you go out to look for a consultant of what you would be looking for and what the -- [crosstalk]

Female Voice: You're still the ED.

Female Voice: [crosstalk] wage and benefit survey. At least you know that, roughly, development directors in two-million-dollar organizations are making --

Female Voice: Right. [crosstalk] Right. So you can make a good entry-level decision there and then customize it.

Female Voice: Mm-hmm.

Female Voice: Did anyone mention earlier that -- I can't remember what it's called. I keep thinking Hotwire, but that's not it. It's Hot something where it's the pro bono. It's not Taproot. But it's an organization out of New York, I think.

There is a very specific name. It's an online setup, and you become a member for one year based on your overall organizational budget.

So basically, for my size organization, my membership would cost \$2,500.

And what that entitles me to for my membership benefit is five pro-bono projects. And they have menus of what these are. I will send you the link to that because I went ahead and said, sure, tell me more. So now, I've got a lot of emails back from one person.

It seems like a person. I think she's even called me because they want me to sign up for membership. I keep thinking, well, all right. Well, \$2,500 is what I might spend on this one project. So hmm. You know, the whole thing about dealing with a pro bono, but it's a totally different model because they're vetting their volunteers at a professional level.

It's like Web site -- you can even do customization of [Salesforce] as one of the projects -- marketing plans, branding plans. You know, some might be design oriented. [I can't think of what that name is though.]

Female Voice: [crosstalk] [Some out of town folks might be interested if you send it to me.] Thank you.

Female Voice: Okay.

Facilitator: Okay, folks. I'm going to end us there. If you have any additional thoughts that percolate as you walk back to the office or get on

BART and want to shoot me an email, we'd love to hear that. I think we got a good cross section of the issues.

At least my reflection is that this diversity of budget size and tenures is, in fact, very germane, as you've pointed out, to sort of the choices people make and have to make. So I think that's something that will definitely factor into the data set as well.

But then, the issues of culture and fit and orientation which don't have to do with budget size, have to do with [vision] and people and such. So thank you very much for taking the time --

[End of recorded material]