



Practical, provocative,
food for thought for nonprofits

What Nonprofits Need to Know About Working with Consultants - Live Q&A

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Presented by



Today's Agenda

- About us and Prosper Strategies
- Understanding the role of nonprofit consultants
- Common misconceptions about working with consultants
- How to find the right consultant for your nonprofit
- Live Q&A
- Resources



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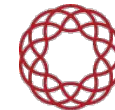
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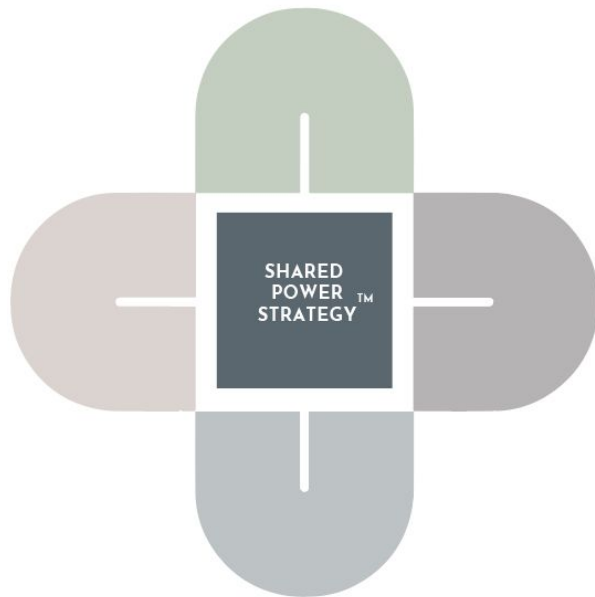


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FIRST GRADUATE

Our Philosophy: Shared Power Strategy™

The Shared Power Strategy™ philosophy says we must redistribute the power to shape our nonprofit's strategies to our stakeholders, especially the people and communities we serve, in order to build more effective organizations.



Understanding the Role of Nonprofit Consultants

Nonprofit consultants typically fall into one of two buckets:

Strategic	Tactical
<p>Role: Offer expertise and outside perspectives to your team</p> <p>Examples:</p> <ul style="list-style-type: none">• Strategic planning facilitator• Marketing strategist• Fundraising strategist• Benefits advisor• Financial advisor• Talent and culture strategist	<p>Role: Fill short or long-term bandwidth gaps on your team</p> <p>Examples:</p> <ul style="list-style-type: none">• Copywriter• Accountant or bookkeeper• Designer• Data manager

Understanding the Role of Nonprofit Consultants

Nonprofit consultants can be individuals working as solopreneurs, teams from large firms, or anything in between.



Common Misconceptions About Nonprofit Consultants:

- Consultants are “vendors”
- Consultants don’t care about whether the work actually gets done
- Consultants can’t really understand our organization
- Consultants will just tell us what we already know
- If a consultant really wants to work with us, they’ll show us by doing an extensive proposal and giving us their best creative ideas
- Consultants aren’t worth the money

**... these things are only true of the WRONG
consultant for your nonprofit**

Here's how to find the RIGHT fit consultant...

How to Find the Right Nonprofit Consultant

Step 1: Align on Your Goals

- Determine the basic requirements and ideal outcomes for the project
- Consider developing a project brief that provides an overview of project goals
- Get input on the brief from as many stakeholders as possible and ensure they're aligned with the project goals

How to Find the Right Nonprofit Consultant

Step 2: Establish the Parameters

- Set a timeline for the project
- Discuss and verify a budget for the project
- Determine what information you need to make a decision

How to Find the Right Nonprofit Consultant

Step 3: Determine Who the Decision Makers Are

- Determine who needs to be involved in the selection process (staff members, board, etc.) and how
- If possible, have the board sign off on a budget and requirements, and then, ensure the board is aligned with empowering the staff to make a decision
- Keep the staff team small and focused
- Whatever your decision-making group looks like, be transparent about it with the consultants you are talking to

How to Find the Right Nonprofit Consultant

Step 4: Talk to Several Consultants

- Find potential consultants for the project through Google Search, referrals/recommendations and consultant directories like [ours](#)
- Have preliminary conversations with at least 3-4 consultants to mutually assess fit
- Remember: this is a relationship, and chemistry matters

How to Find the Right Nonprofit Consultant

Step 5: Allow Consultants to Share Their Approach as They See Fit

- RFPs are not usually the best approach
 - ...and they don't actually encourage equity
- Especially for strategic consultants: conversations > presentations
- Allowing consultants to respond in a manner that's aligned with their style of working is usually the best bet
 - "The Sale is the Sample"

Then, once your consultant relationship begins, treat it as just that...a relationship.

- Communicate
- Contribute
- Share feedback

Q&A

How do you develop a scope of work?

How can you determine what a reasonable budget is for a consultant?

Are contracts necessary?

What should they include?

Q&A

How involved should the Executive Director be in the decision of hiring an organizational assessment consultant?

Q&A

How can I avoid doing all the work for my consultant because they don't actually know our organization?

Q&A

How can we properly scope a project when there are unknowns at the outset?

Q&A

How can we avoid the pitfalls of treating consultants like employees?

How can we ensure they are classified properly as consultants and mistakes to avoid that would accidentally deem them as employees?

Q&A

What are we expected to contribute when working with consultants?

Q&A

What should we outsource vs. do in-house?

More Resources (links to follow)

- [What is a Strategic Consultancy Firm?](#)
- [Does Sector Expertise Matter for Your Organization?](#)
- [When NOT to Hire a Nonprofit Consultant](#)
- [Nonprofit Consultants: What Role Should They Play On Your Team?](#)
- [What a Successful Nonprofit Marketing Strategy Partnership Looks Like](#)
- [What Questions Should I Ask A Nonprofit Marketing Agency?](#)
- [When Outsourcing Your Marketing Could Be the Next Best Move for Your Nonprofit](#)
- [Your Board's Role in Hiring a Marketing Agency](#)
- [The Best Nonprofit Consultants and How to Choose the One That's Right for Your Organization](#)
- [Why We Won't Respond to Your Nonprofit's Strategic Planning RFP](#)
- [Is Your RFP Process Really Equitable?](#)

Get in Touch!



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More questions? Submit them here:
<https://forms.gle/EJ9Kfdp19y77wsB16>

