

# WORKING WITH A CONSULTANT

When your organization takes on a major project — whether it's strategic planning, marketing, fundraising, or program evaluation — working with a consultant can be an invaluable asset.

Consultants bring fresh ideas, objective perspective, specialized expertise, and the focus needed to help move complex work forward.

## Is Hiring a Consultant the Right Move?

Before engaging a consultant, your organization should reflect on the following key questions:

- Does the project require the objectivity that an external consultant can bring?
- Do we have the in-house expertise and capacity to complete this without outside help?
- Can our budget support a consultant?
- Who within the organization will oversee the consultant's work?
- To whom will the consultant report?
- How will we identify and evaluate potential consultants?

## Starting the Search

Once you've decided to move forward with hiring a consultant, take the following steps to ensure you find the right fit:

### 1. Define the Project Scope

Clear expectations and defined deliverables are essential. Clarify the following:

- **Purpose:** What is the goal of the project? What work will the consultant perform (e.g., facilitate a retreat, develop a fundraising plan)? What outcomes are you seeking?
- **Deliverables:** Outline the specific tasks and final work products (e.g., reports, strategies, surveys). Indicate if interim reports or check-in meetings are expected.
- **Timeline:** Identify key dates and final deadlines.
- **Budget:** Determine whether project expenses are reimbursed separately or if you're seeking an all-inclusive price. Will you pay hourly, daily, or per project?
- **Qualifications:** Define any necessary expertise (e.g., bilingual skills, financial acumen, tech tools).
- **References:** Decide how many references you'll request.



## 2. Identify Candidates

Use the [Consultant Directory](#) on the NH Center for Nonprofits' website to search by area of expertise (using "tags"). You can also reach out to peers and partner organizations for referrals.

### Interviewing Consultants

After identifying strong candidates, gather your decision-makers and conduct short phone interviews with 2–3 consultants. This gives you a feel for their style and approach. From there, schedule in-depth conversations or in-person meetings with your top choices.

**Chemistry and communication are key.** Choose someone you feel comfortable working with and who clearly understands your goals.

#### Sample Interview Questions:

- What are your areas of expertise? Have you handled similar projects? What did you learn from these projects?
- How do you communicate with clients during a project? What types of reports can we expect?
- What role do you expect our staff or board to play? What will you need from us?
- Can you describe your approach to managing a project like this?
- What is your fee structure? What's included or billed separately?
- What is your current workload? How will our project fit in?
- How long do you expect the project to take?
- Can you provide references, samples of your work, and examples of past outcomes?
- Have you worked with nonprofits in New Hampshire?

### Setting Expectations and Building a Strong Partnership

Once you've selected a consultant, establish a clear working agreement that includes:

- A written work plan or scope of work
- Regular communication and progress check-ins
- Designated points of contact on both sides
- Agreed-upon reporting requirements
- Payment structure and schedule



## Tips for a Successful Working Relationship:

One of the chief reasons that projects go awry is poor communication. Perhaps the consultant is not getting enough direction from the organization to adequately structure the project. Or the organization may feel they are not getting enough input from the consultant before s/he starts working on a project, with the clock running. Scheduling regular progress check-ins and written reports can help to keep both the project – and the budget – on track.

- **Put it in writing:** Start with a mutually agreed-upon scope of work that outlines deliverables, timelines, and communication protocols.
- **Check in regularly:** Schedule periodic reviews of progress and budgets. Adjust course if needed.
- **Speak up early:** If something feels off or unclear, don't wait. Address concerns promptly to avoid misunderstandings.
- **Clarify payment terms upfront** and pay invoices on time to foster mutual respect and accountability.
- **Hold a debrief:** Once the project concludes, evaluate both the outcomes and the process. What worked well? What could be improved? Providing feedback helps both your organization and the consultant grow.

## Final Thoughts

A skilled consultant can be a powerful partner — bringing experience, efficiency, and insights that help your organization move forward with confidence. With clear expectations and open communication, you'll be well-positioned for a productive and successful engagement.

