

## **How to Hire and Evaluate a Consultant**

The employment of a professional fundraising or development counsel is an investment in your organization's future that deserves careful evaluation. We believe it is useful to keep the desired end result in mind while making this determination. You should always start with a discussion that focuses on what you wish to accomplish by turning to outside counsel.

1. Determine what your organization wants to accomplish and the expertise and set of skills you are seeking in a consultant.
2. Identify prospective consultants by networking with colleagues, contacting similar organizations, and consulting professional sources, such as the Association of Philanthropic Counsel, the Association of Fundraising Professionals or The Chronicle of Philanthropy.
3. Request informational packets and consulting fee structures. Conduct an informational interview with prospective firms in order to narrow the field.
4. Prepare a request for proposals (RFP) and send to consultants you have identified. Request at least three references from the consultant's clients.
5. Review proposals. Proposals should clearly present a proposed scope of work, the activities to be conducted, a timetable, expected deliverables, fees and expenses. Ask them to provide the expertise/background of the representatives who will actually provide the services to your organization. Ask them to list any professional affiliations they or their firm may have, such as APC, the Association of Healthcare Philanthropy or the Chamber of Commerce, for example.
6. Interview several candidates and check references. Always check references carefully. Ask the clients if they would hire the firm again. You may want to ask for three references from satisfied clients and one reference from a client whose goal was not achieved or where the firm or the organization resigned from the contract.
7. In addition to skills and experience, chemistry is an important factor in a successful consulting relationship. Your close working relationship with your consultant requires confidence and trust. Seek an individual or firm who relates well to staff, volunteers and board members.
8. Notify all candidates of your decision in a timely manner. Do not hesitate to provide helpful feedback to consultants who were not selected, if appropriate.
9. Typically consultants prepare a contract for services. Review it carefully. The agreement should include the following: description of deliverables including expected results, activities to be conducted, timeline, designated consultant for your project, professional fees and a budget for additional direct expenses, payment schedule and termination provisions. This is an important document for both the consultant as well as for your organization. Take the time to make sure this is done properly and that everyone is comfortable with the contract's provisions.
10. Once the consultant is hired, schedule meetings at regular intervals to review progress and to monitor deliverables