



Working with Consultants

Four Tips

When looking for and beginning to work with consultants, keep the following ideas in mind:

1. Determine the result you want to achieve with this project.

If your organization isn't clear on this, how can the consultant be? Writing down your goals is a good first step toward determining the agreed-upon deliverable(s) from the consultant to your organization.

2. Develop a Request for Proposal.

A Request for Proposal (RFP) describes the services you need and invites consultants to create and submit their suggested pricing and strategy to deliver them. Releasing a descriptive RFP makes the position competitive, allowing you to negotiate with a pool of qualified applicants. Make the applicants work for YOU! Have them show you why they are a good fit for your organization and your project.

3. Check references!

Make sure your consultant candidates have a track record of success. Ask for two to three references from each applicant. When you call the references, ask about the quality of the consultant's work, their time management skills, and their ability to stick to a set budget.

4. Be clear on expectations.

This includes deliverables AND fees. Putting your expectations in writing, such as a contract or statement of work, *before* work begins, is sound business sense.

Some consultants may require a deposit or retainer fee, but organizations should never pay for services not yet delivered.

Protect your organization by ensuring that all formally contracted deliverables arrive on time and are of good quality before the fee is paid in full.

Consultants can bring invaluable outside expertise to your organization. Utilizing sound business principles when working with them helps to ensure a positive experience and positive results.

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Hiring a Consultant

Developing a Request for Proposal (RFP)

This checklist serves as a companion to the sample Request for Proposal (RFP) document, which helps you create an RFP that solicits the assistance of an expert consultant. As you create your RFP, check off the items below.

Both of these documents are also available on www.ccfgrantees.org.

I have included:

- Statement of Purpose
- Background Information
 - Organizational description
 - Statistics and demographics related to target area and population
- Tasks to Be Accomplished
 - Expected outcomes
 - Specific duties (optional)
 - Timeline
 - Performance monitoring standards or reporting requirements
 - List of deliverables/finished products
- Contract Details
 - Period of performance
 - Payments, incentives, and penalties
 - Contractual terms and conditions, standard contracting forms, assurances, etc.
- How to Submit a Proposal
 - Submission address
 - Submission deadline
 - Who to contact with questions
 - Expected decision date
 - List of all documents and information an applicant must submit



Hiring a Consultant

Developing a Request for Proposal (RFP)

Once you've determined that you need a consultant, one of your first steps is to create a Request for Proposal (RFP) document. It is a critical step in finding the right person for the job. As the [American Planning Association](#) states, "A good RFP is, above all, one that engages the interest of the consultant and elicits creative approaches to the problem." A good RFP is also one that leads to unambiguous proposals that can be scored relative to each other and to your expected performance standards and outcomes.

This document provides guidance on what components should be included in your RFP. It also offers sample text that you can model your RFP on.

A. Statement of Purpose

Your RFP should begin with a brief description of the project for which you are seeking a consultant. In this section, you may also wish to include information about the project's maximum budget. Provide the date by which responses should be sent, and direct applicants to a later section that will offer further submission details.

Example: The Great Scott Arts Association, a new organization in Mosquito Falls, MN, is seeking a consultant or consultants to assist in its initial set-up and in the analysis of possible administrative and performing space, and the creation of a staffing plan.

B. Background Information

In this section, simply provide a clear, detailed description of your organization and its work. As possible, you should also include statistics and demographics that relate to your service area and target population. The level of detail you use in this section should be determined by what information the responder will need to prepare an adequate proposal.

Example: The GSAA was established in 1991 to assist several existing cultural groups in Mosquito Falls and to promote and coordinate arts activities in the area. Mosquito Falls is a town of 7,500 people about thirty miles north of Saint Marvin, on Highway 10. Cultural organizations in Mosquito Falls include a community theater, community orchestra, the county historical society and a separate history museum, a community art school, and a Comprehensive Arts Planning Program (CAPP) group. To date, GSAA has nonprofit and tax-exempt status and a board of directors, but no staff or office space.

C. Tasks to be Accomplished

This is the meat of your RFP document. It should include details about the specific duties you're expecting the contractor to perform, as well as the outcomes you are anticipating. You'll also want to include a timeline for delivering work and outline your methods for monitoring performance. Additionally, provide a list of the finished products the consultant will deliver to your organization, and when each product should be completed.

Some feel that an RFP should dictate "what" and not "how," providing objectives rather than a detailed task list. This approach gives applicants creative license to use their expertise in designing an approach to the issues outlined in your RFP.

Some organizations will choose to break this section down into subsections: scope of work, outcome and performance standards, and deliverables.

Example:

Task 1: Continue development of the Association and its plan for the future

1. Work with a task force of member organizations to determine what joint needs the GSAA should address, and to write GSAA by-laws by end of period of performance.
 - 1.1. Timeline: Adjourn task force by February 2009.
 - 1.2. Outcome: GSAA will be better-positioned to address its needs in a well-structured environment
2. Implement a general membership structure and campaign.
 - 2.1. Timeline: Complete structure document and campaign outline by March 2009, and initiate campaign by May 2009.
 - 2.2. Outcome: GSAA will have a clarified membership structure that positions it to solicit new membership.

Task 2: Research possible funding sources

1. Identify possible local and national funding sources.
 - 1.1. Timeline: Begin research immediately, and continue throughout the period of performance; provide a list of potential donors.
 - 1.2. Outcome: GSAA will have a stronger funding base, including local and national sources, and private and public sources.

Summary of Deliverables

All deliverables are due by the end of the period of performance.

1. By-law document
2. Membership structure document and campaign outline
3. List of potential donors

D. Contract Details

This section provides details that a potential consultant would want to know up-front.

- Period of Performance – Specify the length of the contract, including start date and end date, and the options for renewal.
- Payment, Incentives, and Penalties – List the terms of payment for adequate performance. Highlight the basis for incentives and penalties. Include the maximum fee for the project.
- Contractual Terms and Conditions – Here, you'll attach contracting forms, certifications, and assurances. You might also want to include requirements specific to this particular contract.

E. How to Submit a Proposal

This section details instructions your applicants must follow in submitting a response to your RFP.

Example:

Please submit the following, no later than October 9, to Jason Johnson, Mosquito Falls Music Center, 116 8th Street, Mosquito Falls, MN 56000; jjohnson@mosquitomusic.org. Electronic versions welcome.

1. A technical approach, which describes how you will carry out the tasks outlined above.
2. A summary of your recent and relevant projects.
3. A firm estimate of the fees to be charged, and an estimate of expenses that would be incurred.
4. Resumes of all consultants who would be involved in the project.
5. Names, phone numbers, and email addresses of individuals at three nonprofit organizations who have been your clients during the last eighteen months, whom we can contact as references.

We will hold interviews with finalists during the week of October 12, 2008. If you have questions, please email them to jjohnson@mosquitomusic.org.

Sources:

- Sample RFP text: adapted from content created by Barbara David, posted at www.managementhelp.org.
- RFP Guidance:
 - American Planning Association (www.planning.org)
 - Southern New England Nonprofit Directory (www.sneconsultant.org)
 - RFP Evaluation Centers (www.rfp-templates.com)