



Working with a consultant: How to make the most of consulting services

Consultants look at your organization with fresh eyes and offer a viewpoint that you may not have considered. They come with a diversity of experiences and skills that add value to your organization. Working with a consultant should be an energizing experience that leaves you wiser and more competent. The most important aspect of your working relationship with a consultant is mutual trust. The following guidelines will help you to establish a productive working relationship.

What your consultant will ask of you:

- Clearly communicate your priorities and the outcomes you want your project to produce.
- Do not ask your consultant to perform work or attend meetings before you have signed a contract. Many consultants will provide an initial consultation without charge. After that, be prepared to pay for services.
- Be forthcoming and honest about circumstances that may interfere with fundraising efforts in your organization, such as cash flow or financial management problems, staff changes, or internal conflicts.
- Provide your consultant with the information and cooperation required to meet the deadlines you set.
- Be available and accessible; return messages and emails in a timely manner and make yourself available to meet with your consultant regularly.
- Provide appropriate staff support and administrative functions. These include taking minutes at meetings; distributing meeting reminders, drafting agendas, recording gifts and preparing reports.
- Readily disclose any real or perceived conflicts of interest.
- Do not ask your consultant to provide you with prospects or new donors; the appropriate role of a consultant is to strengthen the relationship between *you* and *your constituents*.

- Provide honest feedback to your consultant; speak up if you aren't satisfied with the work performed or if your expectations have changed.
- Adhere to the terms of the contract and pay invoices in a timely manner.
- Do not ask your consultant to do anything illegal or unethical.

What you should ask of your consultant:

- Your consultant will present a good faith estimate of costs and an accurate scope of work before the project begins.
- You will be billed in an accurate and timely manner for actual hours worked.
- You will retain decision making over your fundraising costs.
- You will receive regular progress reports and be involved in all decision making during the course of the project.
- You will be apprised, in a timely manner, when a course correction or change to the scope of work is necessary.
- Your consultant will be timely, accessible, and available to you.
- Your consultant will adhere to the ethical standards of the Association of Fundraising Professionals.
- Your consultant will tell you if a project or request is outside of the consultant's area of expertise or experience.
- Your consultant will provide council that is based on currently accepted best practices in the field of fund development.
- Your consultant will hold information about your organization as confidential and will not share it with others outside your organization without your permission.
- Your consultant will honor the unique culture and values of your organization.
- Your consultant will disclose any real or perceived conflicts of interest.