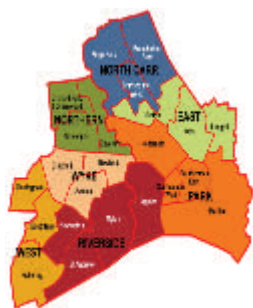


Employing and Working with Consultants



Hull CVS
'community and voluntary services'



This factsheet is intended to answer some general questions about consultants and point you to further information and assistance that will be invaluable if you are considering buying in the services of a consultant.

What is a consultant?

In this context, a consultant is someone who is offering, for a fee, their expertise and experience. Consultants may range from an individual working on self-employed basis to professional companies with teams of expert staff. Some offer specific technical skills and advice to a wide range of organisations across all sectors. Others may specialise in working in particular sectors like the voluntary sector. Anybody who believes they have marketable skills can set themselves up as a consultant and sell their services to organisations that need them.

When should an organisation think about using a consultant?

See the section on further reading for more information. But generally, you might ask yourselves the following questions to see if using a consultant is appropriate;

- **Exactly what are the skills and experience that are needed** for the job in question, and have you explored all the ways of obtaining them (e.g. working in partnership with another organisation; training people in your organisation; reviewing job descriptions to enable you to recruit staff with new skills; creating a temporary job; accessing other advice and support services like CVS etc)

helping you make a difference

- **If you haven't got the time or resources in your organisation to do the job, are you sure you have the time and resources to manage a consultant?** You can't just wind them up and let them run without putting in some work yourself. You should be ready to put in time to support and manage the work you are asking the consultant to do. You should expect to devote some time to reviewing progress from time to time.
- **Is there some other reason for buying in some help?** E.g. you need an independent perspective for an evaluation or piece of research for instance; you've reached some kind of block or conflict of opinion on an issue and need an objective hand to help you move on; the task requires the added value of input from someone with wider experience than you have in-house?
- **Is it a short-sharp one off task?** One that you're unlikely ever to have to undertake again so you don't need to draw those skills permanently into your organisation (for example, undertaking a large capital project like a building)
- **Is it *only* because you haven't got time.** By itself, this might be a weak reason. Have you explored ways of making time? Dropping or putting on hold tasks that are of lesser priority? Increasing hours of an existing staff member? (If you can afford a consultant's fees, you can afford that!)

What can we get a consultant to do?

You can probably find a consultant to do virtually any task that your organisation needs. Whether it's something internal like staff development or training; business planning or job evaluations, or something wider like feasibility studies; research; or an evaluation of a service. And yes, you can employ a consultant to help you with your fundraising, but see below for more information on fundraising consultants.

How do we find a consultant?

The first thing you must do is set out your objective as clearly as you can. Write out the brief. See the section on further reading for more information.

Once you have clear objectives and a clear idea of what you want the consultant to do to achieve it, and how much you can pay, you are ready to recruit your consultant.

Obviously if you need a consultant for a very specific technical task, like designing a building, you will need to identify suitably qualified consultants like architects. But otherwise, you should be able to find a consultant with the appropriate skills and experience for most of your organisation's needs by looking at the NACVS or NCVO directories of consultants.

Recommendations from colleagues in other organisations might help, but you should not just go by them alone. Bear in mind the work the other organisation was having done – unless you're having the same thing done, how can you be sure that the consultant who they think was excellent will suit your project?



What do we do when we find a suitable consultant?

You should then think about how you are going to go about appointing a consultant. Are you going to simply ring somebody up and ask them to do the job? Or are you going to “interview” a number of consultants by inviting two or three of them to come and do a presentation so that you can pick out the best one. To some extent this will depend on the size and complexity of the project.

You might even need to get some expert advice to help you choose between consultants!

The point is, don't be afraid to shop around and do some research to find the best consultant for your organisation and for the task you need doing. Start with your brief. See which consultant comes up with the best approach to meet your brief. Never be afraid to say “No, that's not what we want.”

Also, be clear what your budget is, and make sure all the work you need to have done is included in the proposal that the consultant offers you before you make up your mind.

How do we make sure the consultant does what we ask them to?

This goes back to the original brief and the written agreement. If you start out with very clear objectives, i.e. a very clear vision of what it is you want to have at the end, you will be able to see more clearly how the work is progressing. The means by which you reach that objective might be negotiable, but you need to be clear about the objective itself.

You should have a written agreement with your consultant, and this should set out things like key tasks and deadlines as well as payments. (A specimen agreement is listed under Further Reading) You should also keep regularly in contact with your consultant, if necessary meet regularly to review progress and discuss ideas. You might need to build some reviews and progress reports into your agreement especially if you need to report back to a committee of trustees or directors.

So what about Fundraising?

Many groups want to pay a consultant to write their funding applications. Reasons are generally along the lines of “we haven’t got time” or “we don’t know the right things to say”.

But, be warned. Most funders do not welcome bids written by consultants for the group. One big name pointed out to us at Hull CVS that if a group hasn’t got the time to complete the application, then they would question whether they have the time to manage the project for which they are applying. Another concern they expressed was that when they then contact the organisation to discuss their bid, they want to talk to the trustees or other responsible people, and if the bid was written by a consultant on their behalf, they would be very likely to struggle to answer any detailed questions, which would bring into question their ability to manage the project. Many funders simply do not want to see their money going elsewhere than for the benefit of the people your organisation serves. Some funders will indeed reject outright bids that are written by consultants.

A second crucial point is that the Charities Act imposes controls on ‘professional fundraisers’. If you pay a consultant to raise money for your organisation they might be a ‘professional fundraiser’ in the terms of the Charities Act, and so a written statement including details about the payments to be made to the fundraiser has to accompany whatever request is made for funds or other benefits. So you can’t hide the fact that you are paying a consultant.

So how can a consultant help us with our fundraising?

A consultant could conduct a review of your funding and fundraising needs and help you devise a fundraising strategy (to get past the scenario of panic applications as funding runs out). A consultant could train your staff and committee or otherwise assist them to develop skills and confidence in fundraising. A consultant could facilitate a strategic review or business planning process to help you prioritise work and incorporate fundraising into your strategic planning.

There may well be occasions when the services of a professional fundraiser are appropriate for your organisation. Large capital appeals for instance, where you might be trying to attract large donations from benefactors, or if your organisation is embarking on large scale wide-reaching fundraising. This might also be appropriate if your organisation’s work extends wider than locally.

And don’t forget, it costs money to employ a consultant. So if your organisation is a charity, you would have a duty to fully consider whether the benefits to be gained warrant the expenditure being diverted from the work you do for your beneficiaries.



Resources and Information

Directory of NCVO Approved Consultants

As well as listing consultants and the kinds of work they can do for you, this directory gives guidance on how to choose a consultant.

Go to www.ncvo-vol.org.uk/publications.

NAVCA - Trainers and Consultants Direct

Online database of consultants is at

www.trainersandconsultantsdirect.org.uk.

The Association of Fundraising Consultants

AFC is an association committed to promoting standards and best practice amongst fundraising consultants. Their website includes members' contacts and guidance on the benefits of using a consultant for fundraising. Go to www.afc.org.uk

Humber Learning Consortium

Trainers and Consultants database at

www.hlc-vol.org/resources/trainers-consultants

Prohelp

A project run by Business in the Community. They might be able to put you in touch with professionals who would be able to help your organisation with a specific task. Contact Prohelp, Hull office

Business in the Community, Melton Court,
Gibson Lane, North Ferriby, East Yorkshire, HU14
3HH, phone 01482 638 610.

www.bitc.org.uk

Charities Aid Foundation

A charity that offers funding to enable charities to buy in consultancy from their list of consultants.

Contact them at CAF Grantmaking, Kings Hill,
West Malling, Kent ME19 4TA, or visit

www.cafonline.org/grants.



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