



nonprofit **alliance**
at Kellogg Community College

***Organizational Member
Consultant Packet
2007-08***

Organizations will find this packet useful as a guide for understanding the process of finding, selecting and working with consultants. It also includes templates and other information to help make sure a consultant is selected that can efficiently and effectively work with an organization to achieve the goals of a project.

*The Nonprofit Alliance is dedicated serving
Calhoun County by strengthening and supporting
an effective nonprofit sector*

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Where to Find a Consultant

- Nonprofit Alliance
- Michigan Nonprofit Association
- Friends and peers in the nonprofit community. Check to see if they have engaged a consultant in a situation similar to the one you're facing, what they liked or disliked about the consultant and what the results were.
- Other consultants

Caution: The professional expertise that board members contribute to an organization is an important part of board service. However, hiring board members as paid consultants can raise the potential for conflict of interest. Board members can put their professional knowledge and skills to the best use by helping the organization choose the best consultants from the fields with which they are familiar.

Consultant Qualifications

A consultant should have qualities similar to those you would expect of a professional staff member, such as:

- Expert knowledge in the subject area of the project
- Experience with projects similar to yours
- A respected track record with other clients
- A working style that fits well with your organization

When to Work with a Consultant

From the Peter Brinckerhoff article entitled "How to Choose and Work With a Consultant".

- *The organization is required to use outsiders:* Many funding sources require the use of an outside consultant for such things as financial audits or management audits.
- *The problem to be solved is highly technical or complex:* If you are deciding to implement a new computer system, accounting software package, personnel policies or other technical issue, an outside expert can offer the knowledge and guidance you need to make an effective decision. Complex organizational issues may also require a consultant to navigate the group through an organizational change.
- *The problem is a one-time or infrequent one:* If your organization is going to build an office building, it isn't worth the time or money to train staff to be architects, realtors and contractors. These individuals should be hired as consultants.
- *You need an unbiased outsider:* Outside consultants can approach problems or issues in an organization from a broader perspective than that of inside personnel.
- *You don't have the time:* This may be a good reason to use a consultant once, but too often might mean that there are some deeper issues to examine.

When *NOT* to Work with a Consultant

- *To reinforce a decision already made:* A consultant hired for this reason will only tell you what you already know!
- *To do regularly performed work:* (The exception is an auditor, who is required to be an outsider and do the same work annually.) A consultant is best used to solve problems or teach solutions. There are times when an outside individual can be used for routine work. A person hired in this capacity is considered an independent contractor, not a consultant. A consultant is someone who brings expertise to an issue and often, aided by non-employee status, compels the organization to examine unchallenged assumptions critically.
- *To impress your board, staff and funders:* Hiring for show is a waste of time and money.

Questions to Consider *BEFORE* Calling a Consultant

- *Do you have enough, but not too much, of an idea about what you want to accomplish?* The best way to start working with a consultant is to have a basic idea of what you need accomplished and then use the consultant's expertise to help shape the focus and outcomes of the consultation.
- *Have you involved the right people in deciding to take on the project?* Think about key staff, board members or volunteers who will be affected by the outcome. Bringing in these key decision makers early on ensures that everyone will have a stake in the project and that you will get the most from a consultant.
- *Do the key board, staff and volunteers have time to commit to make the project successful?* If you are thinking of starting a capital campaign for a new office building and most of your staff, volunteers and board are working to pull off a major special event, now would not be the time to engage in this type of time-intensive campaign. Keep in mind that a consultant cannot work in a vacuum. He or she needs appropriate access to key decision makers to make the consultation effective. You and your staff and volunteers have to be accessible in person or by telephone (or now, even by e-mail) when the consultant needs information or help.
- *Have you set aside money to pay the consultant?* Good, professional services cost money. You need to budget beforehand for a possible consultation. For example, if you and your board have decided that you will undertake a comprehensive strategic planning process next year, you should start now and discuss with consultants, management support organizations and other nonprofits possible costs so that you can work this into your budget for next year.

Caution: It may be possible for a consultant to meet with you within the week that you call to discuss your request, but it's good to allow at least four weeks before you'd expect the project to begin. As consultants are usually tied up with several different, long-planned engagements at any given point, their schedule may be limited.

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For more information and additional resources, please contact Nonprofit Alliance at 269-565-2190 or visit our website at www.nonprofitalliance.org. Updated April 2007.

Selecting a Consultant

In order to have a successful experience with a consultant it is essential you find the right person to work with your organization. The following steps can make this process easier.

Steps in Selecting a Consultant

1. Have in an initial phone conversation with at least two or more potential consultants.
2. Exchange any necessary papers to give them a better idea of your problem / issue and to get to know each other better via written information.
3. Set up a face to face meeting with them and appropriate staff or volunteers to learn more about your organization's issues and how each consultant would work to address them.
4. Ask for a written proposal if you're seriously considering the consultant.
5. Ask for references and **CHECK THEM!**
6. Make your decision and ask the consultant you selected to draw up an agreement.

Questions and Details for the Selection Process

1. Initial phone conversation

- Does the consultant understand what you're talking about? As you begin to explain your problem, do they ask thoughtful questions? If not, then this person may not have the necessary knowledge or experience to undertake your project.
- Is the consultant available in your timeframe? If the dates don't work, you may consider whether you want to change your timeframe or look elsewhere.
- Will the consultant's style and approach work well with your organization? You will most likely not reach an answer to this question from an initial phone conversation. However, it is worth a minute to note the different types of roles that consultants can play within an organization:
 - *Facilitator*: Specializes in gathering enough information from you to broker and moderate a meeting.
 - *Trainer*: Gathers information on a specific topic to lead an interactive presentation with a group in a classroom setting.
 - *Consultant*: Can be engaged for a comparatively longer period of time to tackle complex organizational issues or highly technical issues.
 - *Presenter*: Provides expertise on a given subject area through a presentation to a group.

If you need an individual to work with your organization over a several month period to restructure your board, it would not make sense to engage a presenter. On the other hand, if you need someone to do a one day workshop on fund raising for your board, then a presenter or trainer might be the right person to hire.

2. Exchange of necessary papers/information

This step will help you and the consultant assess whether you want to work together. The purpose is to see if there is a real commitment by all involved. The paper exchange can include, but not be limited to a consultant's resume and/or brochures, organizational annual report and other publications, computer specifications, budget, fund-raising plan, and strategic plan.

3. Face to Face Meeting – This step will serve several purposes, including:

- Allowing you to explain your problem/issue and draw on the consultant's experience to help shape a solution.
- Give you a feel for the style and approach that the consultant would take to address your issue.
- Aid in establishing trust between you and the consultant.
- Possibly give you a rough estimation of the cost for the proposed project.

Caution

- *Don't hold back!* To start building trust and know whether you can work together, it is critical to share all information which will help the consultant understand the big picture. Remember that a consultant is a professional who has probably heard a story similar to yours before. What you say will be kept confidential.
- *Bring the appropriate people.* While a large entourage is not necessary for this initial meeting, it's important to bring the person or people who will be most involved in the project. Typically the board president, a key volunteer and/or key staff members make a useful ad hoc committee.
- *Learn from the consultant.* Even in an initial meeting you may learn much about your issue that you did not know before. Consultants generally do not charge for this meeting and after listening to you and asking questions, may offer some suggestions as to how to approach the issues. Even though you may have a clear idea of how you want to proceed, listen to the consultant's ideas and be open to new strategies.
- *Ask questions.* Ask the consultant what you can do yourself to prepare for the consultation. You may need to have certain pieces in place before the consultant is retained. This can save them time and you money.
- *Plan to spend at least 60 minutes in this initial meeting.* Depending on the complexity of your issue, it might take much longer than that. It may even be necessary to have another face to face meeting before moving on.

4. *The Written Proposal* - After initial meeting(s) request a written proposal from the consultant which should spell out the following for the project they will undertake:

- ✓ *Objectives:* What outcomes are you seeking?
- ✓ *Scope:* Remember that consultants can't fix every problem in the organization. Their expertise is best lent to one clearly defined issue.
- ✓ *Activities:* What activities will your organization and the consultant undertake to meet your objectives?
- ✓ *Deliverables:* What will be the final product of the consultation? Are you looking for organizational results or a tangible product?
- ✓ *Personnel:* Who will be involved in delivering the consultation? Which of your staff people will the consultant need access to? What other consultants, professionals or subcontractors will the consultant bring in?
- ✓ *Consultant/Client Expectations:* What are your expectations of the consultant? What are their expectations of you?
- ✓ *Cost:* Expect a detailed estimate of the cost. Some consultants ask for a retainer up front. If using a fund-raising consultant, beware of anyone who offers to get paid based on a percentage of funds raised. This is considered an unethical fund-raising practice by most trade associations including the National Society of Fund Raising Executives.
- ✓ *References:* It's perfectly acceptable to ask for references from a consultant. Three is usually a good number, and be sure to call them.

Caution: Unless you know the consultant personally and are absolutely convinced you need to look no further, it is recommend you repeat this process with at least one other consultant. You need to have a choice as well as points of comparison. In general, when evaluating proposals, you should balance the importance of experience and quality with your budgetary needs. In addition to information from references, questions to consider include:

- Does the consultant have the appropriate experience and qualifications?
- Does he or she understand the goals of the project?

- Can he or she complete the project on time and within budget?
- Does he or she ask creative questions about the organization and the project?
- Do previous clients give favorable reports on working relationships with them?

5. Reference checks

It is extremely important that you not skip this step. Anyone can look good on paper - you need to assess the consultant's reliability, expertise and professionalism. You should call at least three references. Ask about the consultant's skill, history of availability and style as well as their satisfaction level with the outcomes. Expect that this process will take some time, as you may need to leave messages and wait for them to be returned. *Sample reference check questions can be found in the NPA document "Consultant Reference Checks – Sample Questions".*

6. The Written Agreement

Satisfactory client/consultant collaboration rests upon the shared understanding of project needs and agreement about how the project will be executed. A written statement is crucial to completion of the project in an effective and efficient manner.

The work agreement should include the following:

- ✓ Services and scope of work to be completed by the consultant and the client.
- ✓ Arrangements to be made and / or paid for by the consultant and the client.
- ✓ Tasks and timetable for completion, including the start date and ending date of the agreement.
- ✓ Description of fees (project based or time based), expense reimbursements, and/or payment schedules and method of payment. If the project is time based, the contract should also include a projection of the hours necessary for the work.
- ✓ Reporting requirements of both parties to the agreement.
- ✓ Person(s) acting as liaisons for both the consultant and the client; and those authorized to commit the client organization to key decisions regarding execution of the agreement.
- ✓ Conditions, policies, and/or procedures for cancellation of the agreement by either party.
- ✓ Confidentiality policy used by the client, consultant or both.
- ✓ Nature of the final project and description of ownership of all materials produced as a result of the agreement.
- ✓ Statement of the employment status of the consultant in relation to the client.
- ✓ Signatures of persons authorized to execute the agreement with dates.

Note: The agreement may also state how the records or products prepared in the course of the work relationship shall be held, for how long, and in what manner by either party. A sample consultant contract is available through NPA.

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Consultant Reference Checks Sample Questions

Checking the references of potential consultants is an essential part of ensuring you find the best person to work with your organization. Following are some examples of questions that can be asked to help you get the information you need to make the best decision. It will be important to consider goals, timeframe and the specific needs of your organization when deciding which questions to ask.

- What was accomplished through the project?
- Were the identified goals completed?
- Did the consultant quickly grasp the needs of your organization and its underlying problems?
- Did the consultant work at an appropriate pace?
- Was all work completed on time and on schedule?
- How did the consultant communicate with you, and was it appropriate for the project?
- Did they develop an appropriate work plan for the project? How closely was this work plan followed? Were changes properly negotiated? Were there a minimum of changes overall?
- Were their reports and written materials timely, accurate, and useful?
- How did the consultant's actions affect the board and staff?
- How did the consultant treat your staff? Did people like and respect the consultant? Did people feel that the consultant treated them with respect and consideration?
- Was your feedback incorporated into the consultant's work as appropriate?
- Did the consultant appear to behave professionally?
- Was the consultant flexible enough to adjust his/her changing perceptions of your organization and its challenges without losing sight of the project's original focus?
- Did the consultant provide practical and useful models of behavior, thought, or action that could be incorporated into your organization's work?
- Did the consultant accomplish what he/she was hired to do? Were you happy with the quality?
- Would you hire the consultant again?

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Understanding Consultant Fees

Securing a consultant for work on a specific project is not like hiring a staff person to complete the same work. If you are new to working with a consultant their rates may seem quite expensive to you.

Reviewing their resume and sample work and checking their references may help you better understand their rate structure, but keep the following in mind as well:

- *Benefits Savings* - Don't forget that a consultant is self-employed or works for a firm. In either case you will not have the traditional expenses that accompany hiring a staff person. You may be able to pay a staff person a decreased hourly rate as compared to a consultant, but you incur additional staff expenses with health and other insurance, retirement, employer taxes, etc. Comparing the hourly rate of a staff person, even with similar education and/or experience, can be like comparing apples to oranges.
- *Planning Time* - Some of the hours consultants bill for are obvious, but a great deal of preparatory work that you may not be aware of can also go into a project. For example, if you hire a consultant to lead you through a staff retreat, they will need to do much more than just show up for a few days to facilitate some discussion and planning. They will need to review information to become familiar with your organization and staff, prepare materials for use at the event, review their tool kits to match the most appropriate learning methods and activities with your staff and the goals of the retreat, set agendas for and attend preparatory meetings with staff to plan for the project, etc.
- *Final Project Submission* - Depending on the project and what the final product is, a consultant may have many hours wrapped up in preparing their final work to be submitted to you. Projects such as market research, strategic planning, fund development planning, etc can require a consultant to put significant time into developing a useful and complete document for an organization.
- *Research* - Obviously program evaluation requires some research time, but other projects can as well. For example, a consultant cannot just write a fund development plan. They first have to research and understand your funding environment then work to uncover your best points of entry based upon your organizational mission, programs, funding needs, etc.
- *Skills, Education and Experience* - In addition to the actual work they will be completing, you are paying a consultant for their specific skills, education and experience. Often nonprofit budgets do not allow the hiring of a staff person with the background that a specific project may require. By securing a consultant on a temporary basis with the background you need, you can often set up systems and build internal organizational capacity to manage those systems. The initial investment for a consultant may seem expensive, but the efficiency and capacity that can be built for the organization can be invaluable as time goes by.
- *Expenses* - A consultant will likely incur additional expenses that a staff person would not. These may include travel, securing project resources or specialized training, phone and postage, meals, etc. Again, comparing the hourly rate of a staff person, even with similar education and/or experience, can be an unfair comparison.
- *Discounted Rate for Travel* - Remember that although consultants bill for travel hours related to a project, most will charge this time at a discounted rate (unless they are also completing project work during this period.) Be sure to clarify this in developing the contract.

Updated July 2007

Consultant Fee Guidelines

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Category	Level 1	Level 2	Level 3	Level 4
Work complexity	High degree of specialized skills Intersecting task bundle, task simultaneity and sequencing, politically sensitive, informational & attitudinal questions predominate, problems unclear, innovation frequently required, information needs considerable development, solutions needs to be developed	Moderate to high degree of specialized skills Task bundle, innovation sometimes required, some elements of problem unclear)	Basic to moderate degree of specialized skills 2-3 tasks, mostly straight forward, problems mostly clear	Basic degree of specialized skills 1 task, clear problem, template driven, straight forward, information readily available from client, informational questions predominate, high client readiness, solutions straight forward)
Education	PhD in field related to task	MA or PhD in field related to task	BA / MA in field related to task	BA in field related to task
Skills (Client satisfaction on outcomes produced)	Demonstrated high degree of proficiency / high quality outcomes produced	Demonstrated moderate to high degree of proficiency / high quality outcomes produced	Demonstrated basic degree of proficiency / high quality outcomes produced	Demonstrated basic degree of proficiency / high quality outcomes produced
Experience	15+ yrs experience specific to task	10+ yrs experience specific to task	5+ yrs experience specific to task	5+ yrs experience specific to task
Range (day)	\$1,000 - \$1,200	\$800 - \$1,000	\$600 - \$800	\$400 - \$600

Please note that this information is intended to be used as a guideline only, and that individual consultant rates will vary. Also remember that the level of experience related to a specific project can be more relevant than a particular degree or level of education, but that no particular skills, education or experience can be considered a predictor of success. Previous project performance should always be assessed in selecting the best consultant for your project.

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How to Write a Request for Proposals

Developed from “How to Write an RFP for E-Learning Services” – part of GeoLearning’s E-Learning Strategy Blueprint Series.

What is an RFP?

How can you narrow the list of possibilities before contracting for services? How can you ensure that your organization’s business needs will be met? One solution is to write and distribute a Request for Proposal (RFP) in the marketplace.

An RFP is a document produced by an organization seeking goods and/or services and distributed to prospective vendors/consultants. Vendors then provide proposals based on the criteria specified within the RFP. A well written RFP will outline specific information about your organization, the services and products you need, and the specific requirements suppliers must meet in order to win your business. It forces you to identify your business and technical requirements. It also forces the vendor to state in writing to what extent they can meet your requirements.

A written RFP increases market awareness of your organization’s needs, thereby increasing the competition to serve those needs and increasing the formality of the relationship between you and the supplier. In short, an RFP places you in control of the desired service levels and related requirements and lets potential vendors know up front that your most important concern is the level of customer service you will receive.

Reasons to Write a Formal Request for Proposal

- To increase competition for your organization’s money, which will increase options and potentially drive down cost.
- To identify and select qualified vendors capable of supporting high levels of service in the most cost-effective and administratively efficient manner possible.
- To select stable, organized and efficient vendors interested in developing long-term relationships.
- To award opportunities to the most capable and qualified, whose capabilities and experience can support demands and can grow as needs evolve.
- To outline the terms of a formal working agreement that holds both the buyer and supplier liable to certain terms and conditions (the legalities of the opportunity).

RFPs are a lot of work, but they’re worth it. It’s certainly easy to take shortcuts. Industry gossip, anecdotal stories and conversations over lunch might provide you with a few tips, but deciding on a vendor is much different than using the latest *Consumer Reports* to choose a lawnmower. You need to be educated, and there should be no guessing involved.

Basic RFP Outline

Brief Organizational Background and Project Overview

You should provide a good picture of your organization and what it does, but not overwhelm the reader with information. You will also need to provide an explanation of why you are entering into this project at this time. An effective RFP should include specific details such as:

- Information about your organization's infrastructure, etc
- Details regarding the content and context of the project
- Information about the project team and project implementation schedule
- Budget/schedule criteria

Overall Project Goal(s)

Include the general, big picture goal(s) which need to be met by the proposed program or contract. This may include any measurements of success to determine whether your project has been successful.

Objectives

Objectives should describe exactly what will result from the work in helping reach your overall goal(s). Each objective should provide details around the smaller achievements that will let you know how the project is moving forward and whether it is staying on track.

Benefits of the Project (To the Audience and/or Organization)

Provide a brief summary of the benefits of the project, including details regarding current organizational practices that could be impacted through the work.

If applicable, be sure to include the number of people (by category and geographic location) expected to be reached, as this type of information will assist vendors in understanding your target audience. If your organization itself will be the main beneficiary (projects solely focusing on things like organizational sustainability, internal systems, etc) then a discussion of how resulting organizational changes will impact local service provision and clients would be helpful to the vendor.

Scope of Services / Deliverables

Include the specific tasks and products the consultant will be responsible for delivering through the project, as well as the timetable for completion of each.

Request for Vendor Suggestions/Input

It is a useful idea to include a request for feedback from vendors when there are specific needs you are not sure how to address.

Proposal Requirements and Submission Timetable

Provide details the consultant will need to submit their proposal. Include things like:

- Specific information you would like to see in the proposal
 - A narrative proposal that addresses how they would implement the scope of services
 - A budget for implementing the project
 - A personal or firm overview
 - A description of qualifications and experience
 - Information on similar projects in which they have been involved

- A minimum of three references, including name, title, address, and telephone number.
Indicate whether a letter of reference may be substituted for a reference contact.
- Where to send proposals
- How you will accept proposals (electronically, via post, etc)
- Proposal due date

Rejection of Proposals

It is a good idea to include common language here, such as: *The Committee reserves the right to reject any or all proposals, in whole or in part, received as a result of this Request for Proposal.*

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Nonprofit Alliance *Sample Consultant Contract*

Note: The following information should not be considered legal advice. Legal council should always be sought in developing a contractual relationship.

Points to consider in developing a contract with a consultant:

- In securing a consultant for work on a specific project, the duration of the relationship may be very brief or last for a longer period of time. Be sure projections are realistic.
- Often the consultant will provide the contract, but it may be developed by either party.
- When exact due dates for the consultants work are flexible or yet to be determined when the contract is signed, “TBD” may be substituted in the “Due By” column on the last page.
- When a contract needs to be terminated, this should be communicated to the consultant as soon as possible in writing. All outstanding payments should be made to consultant as outlined in the contract. Open communication with and oversight of the consultant will help ensure contractual relationships are successful, but if you feel you are not getting what you paid for it is best to terminate the contract as soon as possible to cut your financial losses and make necessary project changes. Conducting a thorough reference check and reviewing the consultant’s resume and sample work cannot be emphasized enough as a tool for ensuring a successful relationship.
- Expenses are often tracked by the consultant then reimbursed by the organization, but can be estimated and included in the overall contract.
 - If expenses are tracked then submitted for reimbursement, they are usually not considered as part of what the consultant will be paid. In cases such as this it will be important for you to have an accurate estimate of expenses so that the project does not end up costing you a great deal more than anticipated.
 - If the consultant agrees to include expenses in the total cost of their contract they will not submit them to you for reimbursement, but you may want to keep track of them at some level to be sure initial estimates were accurate.
- The fee schedule may be set up in different ways.
 - Hourly Rate - requires the consultant to track and submit the hours they have devoted to a particular project. In this case it is a good idea for the contract to list minimum and maximum project hours that will be acceptable, and what to do if these hours fall short of or exceed projections. It will be your responsibility to make sure you are comfortable with documentation the consultant submits to you in order to track and bill for their hours, what their billing and payment schedule will be, and that this arrangement is made clear in the contract.
 - Fixed Fee - It may be preferable to set a fixed fee for the entire project, then establish a payment schedule that allows the consultant to receive larger and fewer payments. With contracts like this it is important that you and the consultant accurately estimated the amount of work the project will require then agree upon a total for the work. Often a consultant will want to receive a portion of their payment up front. This is acceptable but be sure that the contact includes recourse for you if you are not satisfied with the final results of the work.
- You are encouraged to make sure that the final contract signed with a consultant has all of the following sample contract components at minimum. However, keep in mind that each situation is different so additional components may be helpful.

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Sample Consultant Contract

Contract

BC Youth Unlimited
&
Mary Jones

September 1, 2006 – August 30, 2007

August 30, 2006

This Agreement is entered into as of _____, 2007 ("Effective Date") by and between _____ ("Consultant") whose address is _____ and _____ ("Organization"), whose address is _____. The parties agree as follows:

Length of Service: September 1, 2006 – August 30, 2007
Scope of Services: See attached chart
Deliverable Dates: See attached chart
Reporting Responsibilities: Consultant reports directly to Catherine Smith, Executive Director, BC Youth Unlimited

Fee Schedule: *(Example)*

Payment will be provided based on the following schedule:

- \$_____ to be paid by September 10, 2006 to Consultant by BC Youth Unlimited contingent upon receipt of:
 - Signed contract
 - Initial invoice
 - Completed W-9
 - Other documentation (*Documents such as a Sole Proprietor Form may also be required, but refer to organizational policy to determine requirements for entering into a contractual relationship with a consultant.*)
- Two payments of \$_____ to be paid to Consultant by BC Youth Unlimited upon completion of deliverables and within 10 days of receipt of invoice, anticipated no later than February 10, 2007 and September 10, 2007.
- *Include details for expenses. (Example: "Consultant understands that all work expenses (e.g., supplies, mileage, phone, internet usage) are the responsibility of the consultant and that work space is not provided by the BC Youth Unlimited.)*

Confidentiality:

Any information shared in the context of this agreement regarding the community, partner organizations, BC Youth Unlimited, focus group results, and individual interviews would be considered and maintained as confidential and will be shared only with the Executive Director of BC Youth Unlimited.

Ownership/Intellectual Property Rights:

Work developed by Mary Jones will be acknowledged as the work of Mary Jones on behalf of BC Youth Unlimited with support of its funding partners. Work developed collectively will be acknowledged as the work of Mary Jones and BC Youth Unlimited with the support of its funding partners and would acknowledge any other partners as mutually agreeable. Mary Jones, BC Youth Unlimited, or its funding partners may utilize and disseminate such property with full attribution as indicated above.

Termination of Contract:

Either BC Youth Unlimited or Mary Jones may terminate this contract with 10 days written notice. All expenses incurred through the separation date to be paid by BC Youth Unlimited.

Contract Amendments: Contract may be amended only with the mutual written consent of both parties.

Arbitration/Mediation:

In the event of any disagreement or dispute concerning this agreement, the parties shall first refer the matter to nonbinding mediation, with the mediator to be selected by the parties.

Governing Law/Severability:

This agreement shall be governed by the laws of the State of Michigan. In the event mediation has failed, any action or proceeding arising from or relating to this agreement must be brought in a state or federal court in Michigan, and each party irrevocably submits to the jurisdiction and venue of such courts. The invalidity or unenforceability of any provision of this agreement shall not affect the validity or enforceability of any other provision.

Competent Work:

All work will be done in a competent fashion in accordance with applicable standards of the profession, and all services are subject to final approval by the Organization prior to payment. The manner and means by which

Consultant chooses to complete the services are in Consultant's sole discretion and control. In completing the services Consultant agrees to perform the services at a place and time which the Consultant deems appropriate.

Taxes:

Consultant hereby agrees that the responsibility for the payment of taxes from the funds received under this contract shall be the responsibility of the consultant.

Indemnification:

Consultant agrees to indemnify and hold harmless BC Youth Unlimited and its employees from any claims, damages, liability, injury, expense, or loss due to the consultant's performance under this contract.

Insurance:

Consultant understands and agrees that BC Youth Unlimited will not carry insurance coverage for the consultant.

Nonprofit Alliance Referral Fee:

Any referral fees owed to Nonprofit Alliance by the Consultant as a result of entering into this contractual relationship will be the responsibility of the Consultant. However, the Consultant agrees to deduct this fee from the final contract total so that the Organization can make this payment directly to the Nonprofit Alliance on behalf of the Consultant.

Catherine Smith, Executive Director
BC Youth Unlimited
Signature/Date

Mary Jones
Consultant
Signature/Date

Project Responsibilities: BCYU Youth Solutions Program Development and Funding	<u>Due By</u>
1. Building New Capacity to Serve Youth <ul style="list-style-type: none"> • Develop the Youth Solutions - Facilitator Training program structure based on work to date and planning from past / future team meetings. • Curriculum to be developed based on approved learning objectives. • Submit monthly reports as to progress. 	2/1/07 2/1/07 10/1/06 to 1/1/07
2. Youth Support Grants <ul style="list-style-type: none"> • Review materials developed to date regarding Youth Solutions donor advised fund grants. • Participate in planning meetings to develop committee structure and train members. • Revise the guidelines, application and management processes consistent with meeting outcomes and approved BCYU proposal to YouthWorks Foundation. • Work with BCYU to design and disseminate information to potential grantees regarding Youth Solutions donor advised fund grants following finalization of design and processes. 	12/1/06 9/1/07 to 4/1/07 4/1/07 6/1/07
3. Fund Development and Sustainability <ul style="list-style-type: none"> • Facilitate funding goals discussion at January 2007 Youth Solutions / BCYU Board retreat. • Engage Youth Solutions members in development and implementation of Fund Development Plan, based on identified fund development goals. • Submit monthly reports as to progress 	1/15/07 1/15/07 to 7/1/07 2/1/07 to 6/1/07

NOTE: When exact due dates are yet to be determined, "TBD" may be substituted in the "Due By" column.

Tips for Maximizing the Consulting Experience

Deciding to engage a consultant can be one of the most important decisions a nonprofit manager will make. The following tips are intended as a framework for success and can be modified to meet any of your specific needs. Keeping these tips in mind will give you a leg up in ensuring a successful and productive consultation experience.

- Do what you say you will do, and remember that a consultant cannot reach the objectives you have set together without information and input from your board and staff.
- Communicate well with the consultant and to the board, staff and other stakeholders as the project progresses. No one likes to be surprised with "final" recommendations.
- Notice if you are feeling drained or discouraged about the project and it doesn't seem like a priority anymore. This feeling may be resistance to change. Change is hard, but is a part of most consultations. Make sure you work with, not against, your consultant.
- Be open to new solutions, as successful outcomes often require experimentation.
- Enjoy the work and opportunity to learn, stretch, have fun and get good work done.
- Appreciate the outside perspective that the consultant brings, and take advantage of learning from their expertise.
- Don't think of consultants as staff. Remember that you hire them for their expertise and objectivity. Their role is to help you find solutions, and that often involves recommending tough, sometimes unpopular decisions.
- Avoid "scope creep", as the consultant was not hired to "fix" every organizational issue.
- Stick to the written agreement. If you discover additional outcomes you would like to achieve, amend the agreement, develop another one or remember another consultant might better be suited to address new issues.
- Offer feedback to the consultant. Just as it's important to keep communication flowing with affected parts of your organization, it is vital to talk with the consultant about how the work is going. Midcourse adjustments are possible only if all parties work them through. A formal debriefing session at the end of your work together will provide a satisfying sense of closure.

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Organizational Survey on Consultant Effectiveness

Please note that survey results are confidential, but may be shared with the consultant for purposes of professional development.

Organization: _____ Name/title of person completing survey: _____

Consultant: _____

Dates of contract: _____ Did NPA refer this consultant? ___Yes ___No

One sentence description of project:

Briefly list the goals of the project as they were provided to the consultant in their contract:

Briefly explain what was accomplished through the project:

Please rate your experience with the identified consultant on a scale of 1 to 4, with 1 being completely unsatisfied, and 4 being exceptionally satisfied. Please provide a brief explanation for any scores lower than 3.

<i>Related to quality of service provided, I was satisfied with the consultant's ability to...</i>	<i>1 Completely Unsatisfied</i>	<i>2 Somewhat Unsatisfied</i>	<i>3 Satisfied</i>	<i>4 Exceptionally Satisfied</i>	<i>Use this column to answer "N/A" or to provide an explanation for scores of less than three.</i>
Develop and manage an effective work plan					
Complete project tasks/goals on time					
Complete project goals based on those listed in the contract					
Present materials clearly and effectively					
Provide written reports and materials that were clear, timely, accurate, and useful					

<i>Related to the quality of the consultant / client relationship, I was satisfied with the consultant's ability to ...</i>	<i>1 Completely Unsatisfied</i>	<i>2 Somewhat Unsatisfied</i>	<i>3 Satisfied</i>	<i>4 Exceptionally Satisfied</i>	<i>Use this column to answer "N/A" or to provide an explanation for scores of less than three.</i>
Communicate clearly with staff					
Negotiate project changes					
Ask questions regarding work as needed, and incorporate feedback					
Treat staff with respect and consideration					

Grasp needs of the organization and its underlying problems					
Behave in a professional manner					
Be flexible in their work as needed					

Please respond to the following questions, providing a brief explanation for any “no” answers:

	Yes	No
<i>Did the consultant accomplish what he/she was hired to do?</i>		
<i>Were you happy with the quality of their work?</i>		
<i>Would you hire the consultant again?</i>		

Please answer the following questions, attaching additional sheets as necessary:

Approximately how many consultants has your organization engaged:

in the past 12 months? _____ in the past five years? _____ Not sure _____

Briefly discuss the experience, education and training of the person managing the consultant relationship / project in relation to the specific goals and needs of a project of this nature.

Was there a staff change in relation to managing the project at any time? If so please explain.

In your opinion, how effective was your organization in engaging the consultant (providing clear direction both verbal and written, feedback as to progress, appropriate information to complete goals as assigned, access to necessary staff, etc)? Please explain.

Is there anything you wish you would have done differently in providing support and direction to the consultant?

Is there anything that could have made the experience more positive or productive? If so, what and how would it have helped?

Additional Information:

Thank you for providing this important feedback!

Please return your completed survey to Teresa Durham at Nonprofit Alliance by any of the following methods:

- *Email - durhamt@nonprofitalliance.org*
- *Fax - 269.962.4290*
- *Mail - Nonprofit Alliance
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