Checklist for Choosing the Right Consultant*

___1. Clearly define the project(s) for which you need outside help.
   ✓ Build Board and staff consensus on need to hire consultant.
   ✓ Determine internal decision makers and selection process.
   ✓ Out of many possible outcomes, what, specifically, do you want to achieve?

___2. Identify appropriate consultants to help you achieve your goals.
   Sources include:
   ✓ Directories: ACN, for example, publishes an on-line directory by category.
   ✓ Referrals: both personal and professional sources.
   ✓ Advertisements: trade publications and/or internet search.
   ✓ Determine arena and level of expertise required; confirm budget available.

___3. Screen prospect pool to top candidates.
   ✓ Request basic information from all candidates, then select finalists to interview.
   ✓ At least two is productive; three is plenty; more than four begins to be counterproductive.

___4. Schedule face-to-face meetings with your top prospects.
   ✓ Allow at least one hour for each; anything less is not in your own best interest.
   ✓ Provide appropriate organizational information to each prospect prior to your meeting.
   ✓ List your criteria and key questions, then use consistently for each presentation.

___5. Make sure that the consultant’s philosophy and mission are compatible.
   ✓ Agreement on values, vision and personal compatibility are essential.

___6. Request proposals from your top candidates.
   ✓ Ask them to specifically address what services they will provide, their cost and fees, a preliminary timeframe and the expected outcome.
   ✓ Are there organization-specific questions for which you need an answer as well?

___7. Frame cost considerations in terms of net gain.
   ✓ Experience shows that the lowest bid may not turn out to be the least expensive.
   ✓ Meeting your net objective is the ultimate goal.

___8. Check references provided by consultant finalists.
   ✓ Ask if former clients would hire the consultant again.

___9. Notify all candidates of your final decision in a timely manner.

___10. Request a detailed contract specifying:
   ✓ Services
   ✓ Schedule
   ✓ Fees and Reimbursed Expenses
   ✓ Location
   ✓ Termination Clauses
   ✓ Personnel
   ✓ Payment Terms

*Source: Association of Consultants to Nonprofits (www.acnconsult.org)