Work Effectively with Your Nonprofit Consultant
A Pre-Engagement Checklist

- [ ] **Identify the primary contact for the project**
  This person needs to have decision-maker responsibility and able to connect people within the organization to the consultant when needed.

- [ ] **Develop a brief description of the project/problem**
  If you're not sure, run the 5 Whys exercise to get to the root of the problem.

- [ ] **What is the strategic alignment of the project?**
  How does the engagement advance the mission of your nonprofit?

- [ ] **Ask, why are we considering outside help? How will this make our work life better?**
  How did you come to the decision to seek help outside of your own staff?

- [ ] **What does success look like?**
  Be specific. Go back to the SMART goals. Specific, Measurable, Achievable, Realistic, Timebound

- [ ] **What is your expected ROI or Value of the Project?**
  ROI can be revenue or capacity increases or less easily quantifiable decreases in staff burnout or time to project completion.

- [ ] **What Milestones will you track?**
  For each of your Project Objectives, spell out how you will know it's on track using dates and key metrics.

- [ ] **Know Your Budget**
  One of the benefits of hiring a consultant is knowing the costs upfront. I prefer a set fee structure over hourly as I believe hourly billing sets up conflict of interest issues. Consider developing a set cost, either monthly or one-time, based upon the desired objectives. If you prefer hourly billing, I recommend you are clear on a "not to exceed" number.

- [ ] **Identify potential risks to the project**
  Be specific. These can be internal or external to the organization. I've never worked a project without a risk of some sort.

- [ ] **Evaluate the how and when of communication that will best serve the project**
  An every other week meeting, web-based project management tools, or face-to-face? What works best for this engagement? Include any known events, vacations, or travel that could impact the project.