

POSSIBLE ROLES OF A PLANNING CONSULTANT

1. **Trainer** - Explain the process.
2. **Facilitator** - Provide **assistance** in moving through difficult phases.
3. **Coach** - Provide active **direction** throughout the process.
4. **Strategist** - Actively help set strategy.
5. **Advocate** - Actively pursue certain ideas.
6. **Stakeholder** - vested interest in results.
7. **Researcher** - conduct focus groups; external **environmental scan**.
8. **Writer** - complete the final **written plan**

Bill of Rights and Responsibilities for effective Nonprofit Consulting Engagements

Consultants and their nonprofit clients have both the right to expect and the responsibility to ensure:

- #1: An explicit agreement of what a successful engagement looks like from the perspective of both the client and the consultant. For example, both sides should be able to complete the same sentence starting, "Our work together will have been successful if..."**
- #2: A written agreement on the scope of work that includes a timeline, benchmarks for success, budget, expectations, and key activities and deliverables. The agreement should also spell out how and when the scope of work will be reviewed and revised as needed.**
- #3: An agreed-upon process for evaluating progress throughout the engagement and at the end. This includes evaluating the process itself as well as providing an opportunity for both the client and the consultant to solicit and give feedback to the other party.**
- #4: A commitment to learn, explore, and share together in an open environment. Both the consultant and the client should be willing to speak up, ask questions, and say what's on their mind.**
- #5: A commitment to full disclosure of all information that is relevant to the work and agreement around confidentiality. Relevant information can include (for consultants) any connection, relationships, or prior work and (for clients) community, political, or organizational issues that impact the work. Both sides should agree what is or isn't confidential, how they will share information within and outside the organization, and how to handle any conflicts of interest.**
- #6: A shared agreement on communication methods, systems and terminology. Organizations and consultants have their own norms about how they communicate and about the terms, concepts and language they use. The client and consultant should determine how that communication happens, who is communicating with whom and when, and how to be attentive to ensuring that they understand each other.**
- #7: A commitment to value and uphold #1-6, irrespective of how the engagement is being paid for and by whom. For example, when a consultant is working pro bono or at reduced cost, both the consultant and client should expect the same high level of timeliness and engagement from each other as in a full cost engagement. Also, when a consultant is recommended or provided by a foundation or other source, the client should still be able and comfortable to inform the design of the engagement to meet their needs and revise or cancel the engagement if necessary.**

Signed and Agreed _____

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