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Project Pointers

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POISED FOR PARTNERSHIP

As the year ended, I found myself listening to others talk a lot about the relationship between leaders and their consultants. CEO colleagues expressed frustration about unsatisfying consulting relationships, and my consulting friends were complaining about clients. A few common themes emerged from these various exchanges. But the one that floated through all of the discussions was the issue of how to select and work with consultants. I hope this issue of the newsletter offers some guidelines for more effectively saving time, money and energy.

TURNING POINT

Maximize Your Consulting Investment - 8 Tips for the New Year

The word *resource* applies to time, energy, and political capital as well as dollars. Too often, the pursuit of additional funding comes at the cost of intentional thinking about ways to save resources you already have. The selection and process of working with consultants is one area where you may be able to guard against unnecessary spending and make the most of your investment.

1. **Make sure this is a good fit.**

   The decision to engage a consultant really is all about you and your organization. Even if the person has experience and solid content knowledge, what matters most is how the two of you connect. Even if another executive director has worked well with the person you are considering, you may not feel the interactions are positive. Trust your instincts because you may be working together for some time. If the early conversations feel easy and helpful, then your intuition will probably lead you to make a good decision. Spend some extra time getting to know the professional before making a hasty commitment -- and avoid the costly mistake of replacing the consultant half way through the project.

2. **Create the scope of work together.**

   You may feel you know what work needs to occur and how it should be completed. But, initial meetings with consulting candidates may suggest modifications or lead you in a new direction. This evolution is a healthy, predictable part of the scope development process. Ethical consultants are likely to suggest a shorter, easier path toward your goal, saving money and time. Try to regard the consultant as your partner in determining how best to accomplish the work.

It may make more sense to consider sequential, small contracts instead of agreeing on one large, more expensive one. This approach can support a good fit because the initial agreement offers a practice run for all parties. It also accommodates environmental changes that impact scope once the project is underway and may save money in the long run.

3. **Clarify roles and responsibilities.**

While not easy, hammering out who does what can preserve resources. If the consultant misunderstands the scope of work, many unnecessary hours can be wasted. This either adds hours to an invoice or means some other proposed task will not be done at all. The work that should have been done still has to be completed, now perhaps in an environment of friction. If the CEO is not clear about which tasks are hers and when she needs to confer with the consultant, she may also waste time on unnecessary work. Additional communication inevitably follows and this may involve the board or a significant number of staff members. All of this adds up to lost hours and productivity - what might have been accomplished if the roles had been clear from the beginning?

At another level, confusion over roles also impacts staff morale and may interfere with proactive, cost-saving choices. Unnecessary purchases may be made, meeting costs often escalate, and political capital can be squandered. Collectively, this type of confusion may result in thousands of wasted dollars.

4. **Keep asking.**

Long after the scope has been developed, questions will continue to surface. As the primary guardian of organizational resources, it is important to work through confusion. If a new issue arises before the project is completed, you may have to solicit input to determine the consequences. Developing good questions for staff and stakeholders will help both you and the consultant make decisions about how to allocate resources.

5. **Initiate and respond to communication requests in a timely manner.**

This seems to be the issue that leads to the most conflict, fueled by one or both parties. First, establish communication preferences. Ask each other how they prefer to receive information and what technology they use. Also get clear on what method is most likely to be answered quickly, especially if generational differences are operating.

If you are asked for information and do not have it, please tell the other person where you are in the process. For example, if the consultant asks for financial data, let him know that you will have the figures as soon as your CFO runs a report. Or, the consultant may in fact be working on a request from the Executive Director but failed to acknowledge the email and provide a target for completion. These simple communication responses foster civility, but they also save resources. Ignoring communication requests is expensive and slows down the work in potentially maddening ways. The resulting, largely avoidable costs are real, especially if they relate to the timely submission of grant applications or reporting.

6. **Complete tasks and follow up.**

   This may sound obvious, but is a guaranteed method for saving money. Most projects that require consulting assistance include the coordination of interrelated, date-sensitive tasks and information. So, any late or outstanding items on the leader's "to do" list impact the project timeline and drive up costs. To get the most from your consulting agreement, check to make sure your internal team has the capacity to deliver what the consultant needs without running up fees. Since we know that time, scope and budget drive projects, a change or omission in any of the three reverberates across the organization. Simply, deliver what you promised and follow up to make sure you and the consultant are aligned for next steps.

7. **Evaluate along the way.**

   A final project evaluation and written report will be helpful to all parties involved. And certainly, the consultant can learn to improve performance during future projects. But does this help <u>you</u>? Yes, it may help you think a bit differently for future consulting relationships, but it may be too late to save resources now. Checking in with the consultant on a regular basis is the best way to monitor progress and expenses. If you catch a problem early, you may be able to reallocate resources, modify the scope of work or eliminate some immediate expenses. Hopefully, this will be a shared responsibility and you can decide together where savings might occur if you change gears.

8. **Just say it.**

   The consultant's work should also be monitored on an ongoing basis. If you are pleased with the project's progress, put that into words. And if problems have arisen to the point where you are not happy, let the consultant know. This gives both of you an opportunity to analyze the situation and work through issues. Assertive communication and suggestions help everyone and reduce stress. Again, withholding the expression of your feelings comes at a cost to your agency. A colleague just told me about a project in which the CEO spent money to add a second consultant because she was unable to confront the first consultant. As I mentioned above, guarding current assets is usually less expensive than seeking new income.

VIEWPOINT: IN MY EXPERIENCE

I routinely receive many of the same questions - here are three of them:

Q. What happens to our fundraising if we're also talking about merging?

A. This depends in part on your development plan and where you are in the merger communication cycle. If the community knows you are exploring a partnership, it would be natural to support each other's fundraising efforts. For example, attending a partner's special event sends a clear message to stakeholders as well as internal participants. In some cases, you may even wish to jointly sponsor an event. If the exploration is still confidential, then a more cautious approach is preferable. You can still support your partner, but not in a manner that raises any questions about your plans.

Simply, continue to implement the development plan and take care of your organization. And remember that funding typically increases when a merger occurs, so your current efforts only serve to improve the foundation for the new entity.

Q. Who are your favorite clients?

A. I prefer to think in terms of the qualities that make an ideal CEO. Most of my clients are wonderful people who effectively promote the missions of their organizations. A handful stand out for their exemplary leadership and ability to thrive during challenging conditions. The qualities that define this small group include: emotional health and maturity, the ability to work in partnership with others, skill in delivering bad news with sensitivity, profound content knowledge, empathy with clients and business acumen. They are grownup problem solvers who know their fields.

Q. Why do you usually wear subdued colors?

A. Seriously, I get this one a lot! Some of it results from my natural affinity for the understated. But more importantly, I believe a good facilitator should fade into the woodwork. The process, not the person, should be the focus. Wearing busy prints and colors, not to mention lots of jewelry, could easily distract members of the group. Hopefully, an effective planning process will be more memorable than attire.

Questions? *Let me know and I'll include them (anonymously) in an upcoming newsletter.*

End Point

In over twenty-five years of consulting, I have seen organizations thrive or suffer as a result of consulting relationships. Many of the disappointments could have been headed off if expectations and boundaries were clear from the beginning. I encourage you to have these conversations early and to remember that any external support is there to meet your needs, not theirs. When it comes to consulting contracts, you and your clients are first.

My best for a rewarding new year,

Marta

WORKSHOP REMINDER

Marta's popular Project Management Basics workshop will be offered in March (registration is currently open) and September in 2017 (registration opens May 1, 2017). This workshop receives consistently high marks from participants.

Project Management Basics

March 21, 2017 and September 19, 2017
9:00 a.m. - 12:00 p.m. at Interact for Health
3805 Edwards Road, Suite 500
Cincinnati, OH 45209

Course Outline

WORKSHOP REGISTRATION

Workshops on Site

For convenience and increased participation, you may prefer an in-house workshop. When a larger number of employees share concepts, language and tools, projects move along more smoothly. In some cases, a series of customized follow-up activities complement the foundational workshop. Evaluations from recent on-site trainings have been enthusiastic. Please contact Marta for more information about in-house, customized training.

TOUCH POINT: CLIENT SPOTLIGHT

Beech Acres Parenting Center

For over 160 years, Beech Acres Parenting Center has been serving parents and kids in the Greater Cincinnati area. The organization has adapted to the evolving needs of families, expanded geographically, and gained knowledge and insight through experience. Ten years ago, it added "Parenting Center" to its name and shifted its focus to unleash the power of parents. They believe that intentional and mindful parenting builds each child's unique strengths and helps them achieve their full potential.

Currently Beech Acres offers over twenty programs inside homes, schools and, most recently, pediatric offices. Each of these programs address a different way to:

- Partner with parents to take parenting skills from good to great, including its foster care program of over forty years;
- Partner with parents on a pathway to mental health for their children, using therapists and clinicians at three locations;
- Partner with parents for early childhood success, including Every Child Succeeds; and,
- Partner with parents to rebuild a foundation after transition or crisis, including mediation and special services for fathers.

The vision of Beech Acres Parenting Center continues to evolve as it addresses current parenting needs. One example is Parent Connext which places parenting specialists in Hamilton County pediatric offices, in concert with the Mayerson Clinic for Safe and Healthy Children. Doctors can refer patients to the specialists or patients may initiate the contact. Either way, the Beech Acres team will connect the families with the right resources. For more information, please visit their website or contact Rhonda Curtis by email.

VISIT MARTA'S WEBSITE

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