

# Don't Be Afraid to Ask for Help

## Using Board Consultants

Consider inviting a consultant to assist your board in strengthening its performance. As objective outsiders committed to the organization's welfare, governance consultants can play a catalytic role in helping boards understand and carry out their responsibilities.

### Getting Buy-In

Because governance is fundamentally a collective effort, the whole board must agree to bring in a consultant. Check the board's pulse by conducting a brief board self-assessment. Use a simple checklist, or have members list the board's strengths and weaknesses.

### Starting the Search

Different governance situations require different kinds of consultants. *Expert* consultants can bolster the board's knowledge of technical topics like financial reporting or planned giving. They teach and train by imparting specialized information. *Process* consultants can guide the board in developing more effective ways to carry out its responsibilities. They can also facilitate planning and help resolve conflicts. Part detective, part coach, process consultants bring questions and help the board develop answers.

What does your board need? If the challenge is increasing the board's understanding of the industry or regulatory constraints, then an expert consultant might be useful. Expert consultants include lawyers, accountants, professors, social workers, and others. If the challenge is related to the board's own operations, from oversight to strategic planning, then a process consultant might be more effective. Process consultants often have backgrounds in organizational development, management, psychology, or training.

The board must also set preliminary parameters for the consulting assignment. Is this a one-day retreat or a six-month strategic planning process? Is this part of your annual board development budget, or do you need to raise money for it? Work with

the consultant to gauge appropriate levels of board and staff involvement, and be realistic about expectations. A one-day retreat with no preparation will not yield a full-blown five-year strategic plan.

Who should lead the search? While staff may gather background information, board members and the chief executive will be better able to articulate the board's concerns and therefore should be actively involved in selecting the consultant. The board might delegate this assignment to a small task force.

Where can governance consultants be found? Ask other nonprofit organizations in your region or mission area, management assistance providers, funders like the United Way or a community foundation, and local business professionals for recommendations. Or, turn to national sources, such as NCNB ([www.ncnb.org](http://www.ncnb.org)), Alliance for Nonprofit Management ([www.allianceonline.org](http://www.allianceonline.org)), or Charity Channel ([www.charitychannel.com](http://www.charitychannel.com)).

### Picking the Consultant

Board work is personal, so picking a consultant should not be taken lightly. Gather resumes, marketing materials, and sample reports. After screening information from consultants, the task force should interview two or three candidates to get a sense of their skills, style, and experience.

Look for someone with the right skills and training, from team-building to fund-raising. Don't discount good chemistry. Seek someone whose style fits your culture. Find someone who speaks your language or is willing to learn it. A governance consultant must appreciate your organization's challenges. Finally, check their references by contacting previous clients.

### Working with the Consultant

Board work requires a collaborative relationship throughout the consulting process. The board leadership should work *with* the consultant to define desired goals and outcomes. Draft a request for proposal (RFP), but be sure to align the scope of the RFP with the scope of the assignment.

Once you've reached agreement on the assignment, have the consultant prepare a written pro-

posal that outlines the project's purpose, the activities involved (preparation, materials, on-site work, follow-up), any deliverables, and costs.

Preparing for the consultation also requires joint effort. Staff should give the consultant background documents on the organization, and the task force must ensure board participation. The consultant should share the agenda in advance and, if appropriate, prepare background reading for participants.

After the event, the task force should resume responsibility for ongoing board communication by contacting those who did not participate and disseminating follow-up notes and action plans.

### Following Up

To ensure that the resources dedicated to board development are well invested, the board must take responsibility for ongoing reflection, reinforcement, and repetition.

Reflect on the experience. The board should assess what worked, what didn't, and how to address any unresolved issues.

Reinforce the recommendations or decisions. The task force should follow up on any assignments that resulted from the consultation to make sure that the action plans are implemented and the outcomes stick.

Repeat as necessary. The consultant may check back with the organization after a few months to see how the organization is progressing. The board, staff, and consultant can compare the action plans with the current status and determine whether additional consulting would be worthwhile.

Change takes time, and consulting may require an ongoing relationship. Boards need not be afraid to ask for help, but they must be prepared to participate fully in the process. ●



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