

Finding & Managing Good Consultants

Description

Outside consultants are a prominent feature of community economic development. The reason is that no CEDO has within its board, staff, and volunteers all the expertise that it requires for a comprehensive program; and also even the good expertise represented in-house will sometimes need to be supplemented. It has been argued that CEDOs should develop their internal resources so as to need the fewest outside resources. Yet no matter how strong the case can be made for that perspective, some consultant expertise will always be needed. Thus finding and managing the right consultants is a crucial tool to be honed.

Recruiting good consultants for CEDOs is not as difficult today as it has been in the past, just because the field of CED in North America has become more and more developed and sophisticated. So there are more people with the requisite skills and experience. Some are independent consultants or with a consulting organization, and others are staff of experienced CEDOs, ready to help other groups. The Canadian CED Network probably includes all or most CED technical assistance providers in Canada, and the National Congress for Community Economic Development probably also includes as members most U.S. consultants to CEDOs.

However, just because people call themselves CED consultants and have had other CEDO clients does not mean that they are necessarily prepared to give your CEDO the service you require. CEDOs have to match their needs with the right consultant.

Generally, the type of consultant required is one who specializes in CED activities. But sometimes a simple special technical expertise is needed that has no intrinsic relationship to CED. For example, the CEDO is going to build some affordable housing and needs architectural designs and advice. The careful vetting of this sort of specialist is as necessary as with CED specialists. But consider an analogy of having a general contractor, whereby one might delegate choice of subcontractors or at least review and accept recommendations from the general contractor. Analogously, a CEDO might depend upon its general CED technical assistance provider to recruit high quality specialists in non-CED fields.

There is no certifying body to assure you of the quality of service for any particular consultant in CED or other fields, and so you must do with them more or less the same as you would with choosing a physician or an auto mechanic. That is, you discover them by who recommends them and how. And if you are conscientious, you will inquire deeply into the recommendations, and not just depend upon a favourable mention.

Recruitment is only the beginning of the process of using consultants. Negotiating the contract is a critical step that can make more precise what outcomes you expect to get from the consultation, over what time period and at what costs. And thereafter, managing and monitoring the services provided are the other tasks in this essential tool for CED. How they are done can make the difference between a valuable experience and a waste.

Benefits

Careful recruitment and management means that the CEDO will be more likely to get the best value out of the consultants' efforts. Valuable time as well as money can be saved. Moreover, the particular project on which the consultant serves will have a better chance for a good start. The benefits in using this tool carefully are immediately obvious.

Major challenges

Supervision of consultants' work demands the same attention as any other personnel supervision. Yet dealing with outside expertise can be more complex psychologically and practically. For example, since the supervisor ordinarily begins with much less expertise than the consultant (after all, that's why the consultant is called in), the supervisor may be somewhat reluctant to be demanding or critical at times when that is just what is necessary. Also, the consultant is usually on site only for very short periods. This makes for time constraints that are not present in supervising most regular-time employees.

These features of the relationship put a premium on clarity and precision in the understandings and expectations of the consultant's work, at the same time as it has to be recognized that sometimes what a consultant may do in certain situations is valuable even if it is hard to pin down exactly what is being transmitted. Ultimately, the proper management of consultants' contribution may rest on a very personal relationship of trusting and learning, certainly no mean challenge at all times.

Some practical steps

1. Recruiting the consultant begins with making inquiries among people who can be expected to know who does the kind of work required. Sources may be other CEDOs, or local specialists in a field relevant to the consultant's area of expertise. For example, if a lawyer is needed to help with negotiating and documenting a joint venture, perhaps a bank manager might be able to point out someone who has an outstanding reputation for joint venture problems.
2. Again, just because the potential consultant has gotten a high recommendation does not absolve the CEDO from making further careful inquiries. For instance, who else might know the joint venture lawyer and have a different slant? Someone else might judge the

lawyer's commitment to values shared by the CEDO, rather than judging only the basis of a skill for constructing sound money-making deals for clients.

3. With the consultant selected, the next important step is to talk out exactly what sort of outcomes are sought and to understand exactly how the consultant plans to seek those outcomes for you, as well as how you get to keep fully informed all along the way.
4. Costs, of course, have to be specified, perhaps for different scenarios in what may turn up. Sometimes there is no way around what may seem an awful expense, but that is no reason not to know what are the going rates for this sort of help and thus keep the costs at a minimum. It is even true that occasionally a consultant will be willing to charge less (or even nothing), as a community contribution. That is rare, but it is often worth exploring. Costs may also vary on the basis of your own skills in relating to the consultant during the course of his/her work and getting the information you need all along the way. If you are not precise and take up too much time, you can be a part of the problem.
5. Establishing a schedule of regular progress reports is usually a great help, but again, beware of wasting time by requiring too many of these.
6. Seek the consultant's point of view on how you can be most helpful in the process.
7. Do not hold back your questions when you don't understand. You *have* to understand. Don't forget, the consultant is working for you and your CEDO.

Resource organizations & contacts

- The J. W. McConnell Family Foundation has developed a program of providing consultants to Canadian CEDOs; so they have had a lot of experience in the problems of choosing and managing different kinds of consultants. The agency to which they delegated the program (Centre for the Study of Training, Investment and Economic Restructuring) is a good place to start. CSTIER, Carlton University, Ottawa, ON K1S 5B6 (tel. 613-520-2600-x-1588).
- Canadian CED Network (tel. toll-free 877-202-2268).

Publications

Idrian N. Resnick, *Controlling Consulting: A manual for Native American Governments and Organizations* (Fredericksburg, VA: First Nations Development Institute, 1994). Tel. 703-371-5615.