

This example can be used as a starting point to create a policy or other document for your own land trust, but should be altered as necessary to reflect your organization's unique circumstances using guidance found in the *Land Trust Standards and Practices Guidebook* text and corresponding Standards and Practices Curriculum.

Please Note: If you are using this material for accreditation purposes, see also [the Land Trust Accreditation Commission website](#) for additional information. To search for policies from accredited land trusts, insert <<accredited>> along with the search term (e.g., conflict interest policy accredited).

Should I use an external consultant?

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The Role of the Consultant

When considering whether or not to include consultants in the strategic planning process, a planning committee should first have a clear understanding of what they really want from a consultant, and what assistance a consultant can actually provide. Peter Block, author of *Flawless Consulting*, describes three main roles that an effective consultant should play.

- as "a pair of hands," a consultant can do tasks that a client organization knows how to do itself, but does not have the staff to accomplish (e.g., organizing meetings, drafting documents, conducting interviews with clients, and other such hands-on work).
- In the "expert" role, a consultant provides knowledge or skills that the organization does not have in-house (e.g., doing an evaluation of a program or management function, providing an analysis of the implications of environmental trends in funding or service delivery, etc.).
- In the "collaborative" role, the consultant works as a partner with the organization, contributing process knowledge, but leaving the rest to the client, who has the task expertise and staff to accomplish tasks once the approach is determined (e.g., providing guidance on the planning process and facilitating planning meetings and retreats, while clearly leaving the content debate to the client).

Typically, a consultant proves most helpful to a nonprofit when offering a combination of all three roles with the emphasis on the collaborative role, the consultant can significantly add to the productivity and continuity of the planning process. If no one in an organization has experience with strategic planning, then a consultant's assistance with designing and managing an effective planning process will help focus planners' energy where it is most needed and preclude their wasting time reinventing the wheel. Also, an outside person working with the group offers objectivity and neutrality. Sometimes it takes an outsider to ask the hard or dumb questions, and a skilled facilitator will help surface disagreements about important issues, as well as manage potential conflicts in a constructive way. Still, the reality is that it can be expensive to pay a consultant to do work that a staff could do. If cost is a key consideration, this could in itself determine the role (if any) that a consultant should play in the strategic planning process.

In choosing a consultant, an organization must also look for "fit." A consultant may have all the expertise one could ask for, but still should not be hired unless planners truly have confidence in the person. The consultant must be both a good listener and not afraid to speak honestly. Many important issues will be discussed in the planning process, perhaps including delicate issues that demand discretion or could arouse conflict -- so, a good, trusting working relationship between the

consultant and the planning committee is crucial to a successful strategic planning process.

Checklist for Working with a Consultant

The following list delineates many of the issues described above and is a handy reference for organizers as they consider working with and establishing a working relationship with a consultant (the list is adapted from an article by Barbara Davis published in *The Grantsmanship Center News*, March/April 1983.

- Clarify your broad expectations of what the consultant will do.
- Decide roughly how much you want to spend.
- Talk with at least two consultants and check the references they provide to you.
- Ask each consultant whom you are seriously considering to submit a written proposal summarizing the work to be performed, the time line and cost.
- Make sure you feel comfortable working with the person you select.
- Develop a clearly worded written contract, which should include the following:
 - a list of deliverables
 - a projected completion date
 - a schedule for payment
 - checkpoints along the way at which the client and the consultant can evaluate progress and resolve any problems that may have arisen
 - a mechanism by which either party can terminate the contract before it is completed
 - identification of the person in your organization who has the authority to agree to expenditures or approve the consultant's work
 - an understanding of who will do the actual consulting work.

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of implementing our strategic
plan?](#)

[How do I use retreats in the
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