



### **Working with Consultants: Nonprofit Capacity Building**

Consultants are important partners to the nonprofit capacity building work funded by the John Rex Endowment. Because the Endowment believes in the value of consultants, we offer guidance to help create and foster positive partnerships with consultants and our grant-funded partners as we work together to support an environment where all children and families in greater Wake County live healthy lives.

#### Grantee-Consultant Partnership

A successful relationship between a grantee and a consultant requires three elements: (a) a high level of trust between the parties, (2) bi-directional knowledge transfer, and (3) improved organizational performance in areas such as governance, operational management and resource development.

The role of a consultant will vary depending on the needs of the organization/coalition. A consultant may work independently or in teams to analyze organizational strengths and challenges, provide objective perspectives on current issues and future trends, and serve as an informal coach. They also facilitate strategic discussions among organizational staff and board members, do customized training, and deliver consulting services to meet emerging needs. Some consultants may provide expertise in discrete areas such as legal issues, technology, human resources, financial management and/or fund development systems.

Multiple resources exist to support a healthy grantee-consultant partnership. The resources listed provide useful tips and tools that can help ensure a successful consultant engagement from start to finish:

- US DHHS Administration for Children and Families Strengthening Nonprofits: A Capacity Builder's Library "Working with Consultants", <http://strengtheningnonprofits.org/>
- Free Management Library's "All About Consulting", <http://managementhelp.org/staffing/outsrcng/consult/consult.htm>

#### Consultant Requirements

Any consultant who is engaged through an Endowment-funded grant, needs to comply with the following:

- State of NC regulations and licensure requirements as applicable.
- A minimum of three years collaborative experience (as staff, leadership, member, or consultant).
- A minimum of two years recent experience and demonstrated effectiveness working in a consulting role.

- Demonstrated skill in effective collaborative assessment processes and experience in capacity building efforts with collaboratives.
- Proven experience centering racial equity in assessments and/or capacity building activities.

### Racial Equity Considerations in Consultant Selection

A good consultant match will bring an external perspective that can highlight areas of growth for your organization/collaborative. In the consultant selection process, it will be important to choose someone who can be adaptable, flexible, and able to relate to your partners as well as to the children and families you support. Consideration should be given to the technical skills provided by the consultant as well as the consultant's racial equity approach to the work with a respect for the lived expertise of others to the issues you are addressing.

While everyone may be at different phases of their racial equity journey, listed below are some questions to ask a consultant which may help to inform your decision in selecting a consultant:

1. Describe your personal racial equity journey. Besides gathering resources and trainings, explain ways in which you are building your capacity in this area.
2. Describe prior experiences facilitating collaboratives, partnerships, and/or mergers.
3. Do you have prior experience working with agency leaders or board members from marginalized communities? If so, please describe services provided.
4. Did you experience any barriers when working with agency leaders or board members from marginalized communities? If so, explain how you navigated those barriers to provide the support needed for the client.
5. Explain ways you have built your capacity to accommodate the needs of smaller, grassroots agencies where traditional capacity building techniques may not work.
6. When working with smaller, grassroots agencies led by Black/Latinx/Indigenous leaders, were there additional capacities that the leaders needed that you identified and if so, were you able to accommodate that shift in needs?

### Grantee-Consultant Engagement

When the selection process is finished, together, the consultant and the organization/coalition write a contract that includes a scope of work and timeline of activities. The John Rex Endowment is not involved in the writing or approval of contracts between consultants and organizations/coalitions.