

# WORKING WITH CONSULTANTS

A RESOURCE FROM THE CENTER FOR CONGREGATIONS

Leading a community of faith is a complex process that includes not only spiritual issues but more tangible matters as well. Fundraising, strategic planning, mission statements and building issues are all part of the business that can require assistance from an external source. A professional consultant can provide an objective opinion, offer expertise in a particular field and see issues from afar that congregation members may not see from their close proximity. Following are some thoughts on working with consultants:

## WHY WOULD WE NEED A CONSULTANT?

Consultants offer services in many areas, including refining goals and mission statements, facilitating conflict resolution, and preparing for fundraising campaigns. You can often determine the need for outside assistance when you find yourself stuck on a particular congregational issue. When your congregation is unclear about the next steps or find yourselves revisiting the same conversations or disagreements, it might be time to consider a consultant's help. Other indicators are polarization or taking sides over a particular concern. Consultants can be of help when specific expertise is needed, such as building assessment, technology or fundraising plans.

## FIND THE RIGHT PERSON FOR THE JOB

Look for a consultant with expertise in the area in which you need help. Candidates can be found through your denomination, through other congregations, and through resource centers, such as the Center for Congregations. Interview three to five candidates. Check references. Ask lots of questions about experience, outcomes, style, services, availability and more. Look for someone whose style will fit with your congregation. Finding a consultant who has an appreciative understanding of your traditions is important. A consultant who tries to change the culture of the congregation can cause upheaval and frustration.

## KNOW WHAT YOU WANT

Consultants can play many roles and provide a variety of services. Be sure that you know what you want from the consultant – advice, expertise, facilitation, a plan, a report, an evaluation, suggestions for success or something else. Discuss this with your consultant up front.

## CONVENE A CORE GROUP

The consultant will become part of a team, set up by your congregation, to work on the matter at hand. Your team is a core group of about seven individuals who will meet with the consultant, set up expectations, gather and provide information and assess the results. This team can include the

pastor or associate pastor, but ought to be a balance of folks on equal footing. It is important that no one member of the group is able to take over by asserting his or her standing in the congregation.

## CHOOSE A SPOKESPERSON

From the team, choose one person as the liaison with the consultant. This is the person to whom the consultant will report. This step will avoid confusion and ensures that the consultant will not be taking instruction from several different sources within the congregation.

## DEVELOP EXPECTATIONS

Let your consultant know your expectations. You want to work with the consultant to define the task and the scope of the project, as well as roles and standard practices. Identify the specific outcomes you would like to see and set up accountability for achieving them. Set clear and measurable objectives and then ask the consultant to report periodically to the committee or task force on his or her progress.

## BE READY WHEN HELP ARRIVES

Preparation is required. By the time your consultant is hired, your congregation should have already discussed and gathered data on the matter. Provide all of this information to your consultant. Do not be afraid of divulging too much detail. Be completely honest. The consultant can better address your needs with an accurate grasp of the situation.

## DEVELOP A GOOD WORKING RELATIONSHIP

The consultant and congregation need to work well together to ensure a successful project. Collaboration and mutual decision-making are essential. Trust, mutual respect and



good communication are the foundation for a strong partnership. Communication needs to be two-way – an open give-and-take allows both parties to speak freely.

### IT'S NOT JUST ABOUT BUSINESS

Include the consultant's work in the spiritual life and the prayer life of the congregation. Talk about it and pray about it in places other than just business meetings.

### STAY POSITIVE

Focus on your congregation's assets and strengths. Help your consultant look for the good. Devote your energy to the strengths that can be mobilized to cope with challenges. As a team, develop an imaginative vision for the future. Think about the very best outcome. This type of expansive dreaming can help rally energy. A process that is too serious can weigh down a congregation and cause problems. Take the issues seriously, but allow yourselves to be a bit playful and imaginative.

**ONCE A CONSULTANT IS CHOSEN, A WRITTEN CONTRACT OR AGREEMENT BETWEEN THE CONGREGATION AND CONSULTANT CAN BE FORMULATED.**

**POINTS THAT CAN BE INCLUDED ARE:**

- Name the goals and objectives and how they will be achieved.
- Present a timeline.
- State the services to be delivered – advice, facilitation, a plan, report.
- List ways in which the progress and outcomes will be evaluated.
- Include costs and payment schedules.
- Name the person to whom the consultant will be accountable.
- Don't forget to include an exit clause or statement outlining mutual ending of the agreement, if necessary.
- Get signatures of the consultant and congregation's representative.

**QUESTIONS TO ASK A POTENTIAL CONSULTANT**

- What ministry experience does the candidate offer?
- Does the consultant have experience with your denomination?
- Can the consultant give you an example of a successful congregational experience he or she facilitated? Why was it successful?
- Can the consultant give you an example of a congregational experience he or she facilitated that was not successful? Why was it not successful?

- How does the consultant describe his or her style of consulting (facilitating, expert, process-oriented, etc.)?
- Does the consultant provide ideas and strategies for engaging and communicating with the larger congregation?
- Is the consultant comfortable working with a committee?
- What will the congregation have at the end of the consulting engagement (report, tools, etc.)?
- What is the consultant's fee and the schedule for payment? What expenses are included?

**MISCONCEPTIONS ABOUT CONSULTANTS THAT CAN BE DISPELLED**

- The job of the consultant is to tell us what to do.
- The consultant's job is to soothe and heal our pain.
- When the consultant is finished, everything will be perfect. If it isn't, the consultant did not do his or her job properly.
- The consultant "knows all" and the congregation knows nothing.
- This will be a quick fix.
- Bringing in a consultant signals the failure of the clergy and/or the congregation.
- Consultants are too expensive.
- The congregation's creative thought might be undermined.

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**Working with Consultants** is part of the Using Resources series, which is published by the Center for Congregations to help congregations make effective use of specific kinds of resources. It is our hope that you will find them useful in your work as a congregation.

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## Resources You Can Use

For resources on this subject, check out the Congregational Resource Guide (CRG) at <http://thecrg.org/>. Suggested CRG search terms: consultant, facilitator, coach.

