Working with Consultants:

Tips for Maximizing Your Program’s Use of External Experts in Early Education

Fran Simon, M.Ed. | Early Childhood Investigations Consultants Directory

About me...

My personal mission is to connect Early Education

B.A. & M.Ed Early Education
Child Care Administrator 15 years
VP, Marketing & Technology Teaching Strategies
Chief of Parent Engagement NACCRRA
Business Consultant to ECCE Sector NPOs & Companies

Early Care and Education

Objective: Today you will...

• learn strategies to help you prepare for, identify, and hire consultants.
Agenda

• Twelve (plus) tips for working with consultants from planning through after the engagement is complete.

• Questions

POLL

You are here because you...

• are considering hiring a consultant or are working with one now.

• are a consultant looking for ideas to help your clients use your services.

Poll

Which types of consultants are you likely to hire in the next two years?
Select all that apply!

• Professional Development trainer or developer

• Business consultant or provider (accounting, lawyer, marketing, HR, website, back office help)

• Organizational or leadership (change management, strategic planning, board consultant, fundraising/grants)

• None

• Other.. Type in the chat box
Regardless of the type of consultant you need, it’s all about **change** and building an organization of continuous quality improvement.

**Are you ready?**

*Have you ever felt this about working with consultants?*

*Or, have you thought this about working with consultants?*
Who is at blame for failures?

The steps you take...

Will ensure you get the most from your engagement with consultants.

Before you even find a consultant
Empower yourself to take charge of the problems you are trying to solve and the relationships you need to solve them.

Prepare yourself & your organization

2.a. Gather your internal team
2.b. Identify a primary contact

2.c. Find the right time to engage

2.d. Define your vision. Change is coming

3. Develop a coherent and comprehensive Statement of Work

The beginning of “during”
Search for the right consultant

4.

4.a.
Consider a Request for Proposal

4.b.
Regardless of RFP, expect clarity

Get a detailed proposal
4.c. Consider geography

Think out of the local-area box.

4.d. Become informed

**DUE DILIGENCE**

- References
- Internet & social media search
  - Work samples
  - Background check?

Enter into a contract
5.a. Basic elements of contracts

- Description
- Schedule
- Ownership
- Payment
- Warranty
- Confidentiality
- Cancellation
- Statement of Work

5.b. Description: Scope of the project, key tasks, and purpose of the agreement.

5.c. Schedule: Project deadline, timelines and deliverables.

Make the process iterative.
5.d. Ownership: Rights to the final work; the intellectual property or copyrights, “work for hire,” or licensing, royalties.

5.e. Payment: Amount and form of payment. Terms of payment, fee restrictions, expenses; Type of fee: Retainer, flat-rate, hourly, day rate.

5.F. Warranty: Written guarantee for the integrity of the work; consultant’s responsibility for remedy; client’s responsibility for informing consultant of a need to remedy.
5.g. **Confidentiality:** Protecting trade secrets. The legal penalties for sharing confidential information.

Communicate with staff

The middle of “during”
7. Provide access

8. YOU play a huge role

9. Manage and supervise internal cooperation
After

Follow through, evaluate, follow up

10.

Debrief with internal stakeholders and consultant

10.a.
10. b. Plan and assign next steps and outcome measures

10. c. Implement with clear expectations

10.d. Measure results and analyze
10.e. Refine

Pay on time

11.

12. BONUS!
Resources


Non-Profit Consultants: How to Choose them, How to Use Them, FirstSLA

Sample Request for Proposal (RFP), the Denver Foundation

Sample Interview Questions for Consultants, the Denver Foundation

How to Use Consultants, Lean Systems Institute

When to Use Consultants—and When Not to Bother, National Federation of Independent Business (NFIB)

NFIB Archived Webinars

Why hire a consultant?, The Denver Foundation

Thank you

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Early Childhood Investigations Consultants Directory

ECEexperts.com
A hub where organizations in the early childhood sector can find the consulting expertise they need and where you can make your services visible.

Meet a few of my colleagues...

- Janny Manns: Support ECE Consulting and Training for Regulators
- Tim Watson: Lead to Learning "Early Learning QC Program & QC Methods"
- Lindsay Engelschot: Graphic Design and Marketing Mind
- Amanda Schwartz: Building capacity to support quality for children and families
- Faith Hogw: Helping people learn from research and new ideas

Clients: free
Consultants: subscribe annually for a modest fee.