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HOW TO CHOOSE THE RIGHT CONSULTANT

Practical guide for Third Sector organisations

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Introduction

Non-profit organizations often need external support—especially when facing strategic challenges. Hiring a consultant can be a smart move when your organization needs to strengthen areas such as:

- **Management** and regulatory compliance
- **Strategy** and planning
- **Fundraising** and financial sustainability
- **Communication** and branding
- **Human resources** and volunteer management
- **Innovation** and digital transformation

If your organization wants to start a new project that needs visibility and financial support, if it needs to reposition itself and rethink its identity, if it wants to strengthen its brand identity or create a new campaign... well, these are all cases in which it can be useful to turn to a consultant!

Here are some key points to guide your selection process!

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1. Clearly Define Your Needs

Before hiring a consultant, be sure you understand what your organization really needs.

Is consultancy the right solution—or do you need someone more hands-on, like a freelancer with specialized operational skills? Freelancers can take on specific tasks like campaign communication, fundraising execution, or financial auditing.

Consultants and freelancers offer different expertise. While some professionals may offer both, their approaches and roles often differ.

> A clear, well-thought-out brief helps avoid misunderstandings and ensures you find the right match.

Ask yourself: do you need a **senior expert** with long-term experience or will a **junior profile** meet your needs?

Is this a **one-time project** or will you need **ongoing support**?

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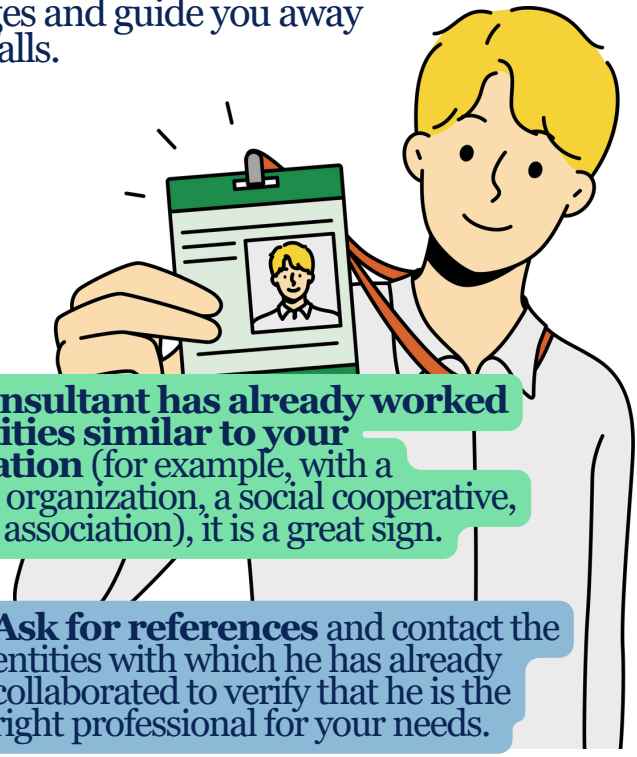
2. Check Education, Skills, and References

Review the consultant's CV, portfolio, and experience—especially with non-profits, foundations, associations, or social enterprises. **Prior work in the sector is key**: it shows they understand the values, complexity, and challenges unique to civil society organizations.

Technical knowledge matters, but so do soft skills, adaptability, and sector insight. Consultants with broad experience can better anticipate challenges and guide you away from common pitfalls.



TIPS

If **the consultant has already worked with entities similar to your organization** (for example, with a volunteer organization, a social cooperative, a cultural association), it is a great sign.

TIPS

Ask for references and contact the entities with which he has already collaborated to verify that he is the right professional for your needs.

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3. Conduct an interview

CVs and references are helpful, but **nothing replaces a direct conversation**. An interview will help you assess whether the consultant:

- understands and respects the realities of the non-profit sector;
- listens well rather than pushing ready-made solutions;
- aligns with your organization's values.

4. Assess value for money

Cheapest isn't always best. Inexperienced consultants may cost you more in time, mistakes, or lost opportunities.

A qualified consultant should be clear and transparent about fees, payment terms, and reimbursable expenses.

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Avoid commission-based payments or "success fees", especially in fundraising. These models can compromise transparency, encourage short-term thinking, and misalign incentives.

Fixed fees or performance-based compensation tied to clear and realistic objectives are better options.

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5. Agree on a Contract

Even a simple contract helps protect both parties. Prepare a letter of assignment that includes:

- the **client** (your organization);
- the **consultant's** name and role;
- **scope of work** and expected results (preferably measurable);
- **timelines** and milestones, including interim reports if needed;
- **fee structure**, expenses, and payment schedule.

Once signed, this agreement ensures clarity and shared expectations for the duration of the project.

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6. Look for Professional Affiliation and Ethics

A consultant who is a member of a recognized professional association likely adheres to **high standards**, engages in ongoing professional development and follows an established **code of ethics.**

This offers additional reassurance—especially in a sector built on trust and accountability.

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7. Is your organisation ready?

Hiring a consultant means **opening the door to change.** If your organization isn't ready to reflect, adapt, or act on recommendations, **you may waste time and money.**

A good consultant won't just tell you what you want to hear. **Their job is to challenge assumptions and help you make informed, sometimes uncomfortable, decisions.** This process requires openness, engagement, and support—especially from leadership and the board.

Before you begin, ask yourself: are we ready to listen to an outside perspective that might challenge how we work?

... and now that you've chosen the consultant that's right for you: enjoy your work!

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