



STRATEGIC USE OF CONSULTANTS

Resource

Wisdom from the Field

Head Start and Early Head Start programs throughout the country have offered their thoughts on how to effectively find, hire, and monitor the work of consultants. What follows is a summary of their tips for successfully working with consultants.

Before You Start

- **Look at the big picture.** This requires “getting out of the weeds” and looking at issues across the program. Broaden your focus and avoid a ‘Band-Aid’ mentality.
- **Involve the leadership team** throughout the process; it helps to promote buy-in and sustainability.
- **Involve families** from the beginning.
- **Define what you are looking for in a consultant.** Finding the right person is vital to success. A program should articulate its specific goal or purpose for hiring a consultant and then develop a set of interview questions that will lead to the right match.
- When doing fiscal planning, **make your consultant budget a priority** if the work will support continuous program improvement. Be sure to reserve enough T/TA money to enlist highly qualified consultants.
- **It takes time!** Don’t expect a quick fix.

Selection Process

- **Look internally for talent.** To be effective, consultants have to know the language of the program. First look at internal resources before spending money on outside consultants. Not only is this a wise use of program resources, but it provides a wonderful professional development experience for talented staff.
- **Facilitate reciprocal learning within your organization.** Using internal staff as mentors or “consultants” across the agency helps to build collaborative professional relationships through reciprocal learning that strengthens all programs’ staff capacity.
- **Learn from others’ experiences.** Reach out to other programs and ask them to recommend their best consultants.
- **Barter services and staff with other Head Start programs.** Explore engaging in an exchange for services with other Head Start programs where you can loan out some of your staff in exchange for borrowing specialized staff (e.g., health consultant) from another program.
- **Act locally.** Utilize local consultants and trainers when possible (e.g., certified mental health consultants, early intervention specialists, public health professional, state department of health staff). This “staying local” strengthens community partnerships because the consultants come to your program with an understanding of the community and leave with a better understanding of Head Start and Early Head Start and all that the programs have to offer.

- **Do your homework.** While looking to find the best consultant to meet your organization's needs, look to other leaders in the field and consider going outside the Head Start or Early Head Start community. Before developing a contract, be sure to check the consultant's résumé and references to learn whether previous agencies have been satisfied with the consultant's work.
- **Conduct a rigorous selection process.** The management team and members of the staff should be actively involved in the recruiting and hiring process, including interviews. Taking the time to find the right consultant is imperative.
- **Don't limit yourself to one consultant.** If you can find a consultant with diverse expertise to meet all your needs and provide continuity, that is wonderful. But be cautious of consultants who say they can do everything; those people are rare. It is better sometimes to engage two or more specialized consultants to make sure your program is getting the best services possible.

Find a Match for the Culture of the Program

- **Know your program prior to hiring the consultant.** Look at your program and analyze its needs before you begin work with a consultant.
- **Find a consultant who understands the culture of your program.** It is preferable for a consultant to be familiar with your program and/or to take the time to visit your program in order to understand its culture and operations prior to developing and providing training. A program needs a consultant who has the needed content knowledge and is also familiar with—or is able to make himself or herself familiar with—the program and its current initiatives, priorities, and conditions.
- **Find a consultant whose philosophy matches your program's philosophy.** Staff can become confused if they are told conflicting information.
- **Look for a consultant who is willing to make a long-term commitment to your program** and is interested in implementing your plans, helping staff succeed, and supporting program improvement.
- If the consultant will be with the program long-term, **allow time for relationships and trust to build.** This is especially important for coaching.
- **Communication is critical.**

Structure the Work

- **Make your intentions and expectations clear when you hire a consultant.** A program needs to know why it is hiring a consultant and should communicate to the consultant what exactly needs to be accomplished. Take time to clarify with the consultant what you need. When goals and objectives are not clearly stated in the contract, it becomes very difficult for the consultant to meet the expectations of the Head Start organization.
- **Find a consultant who can work well with your staff.** Program staff need to buy into the T/TA plan and the consultant's work. Find someone who will listen to staff members' ideas and experiences, facilitate collaboration, and incorporate staff expertise into the action plan.
- **Identify the length and nature of the consulting relationship.** You should have some very specific reasons for why you're hiring a consultant for the specified work, as opposed to creating a permanent position. The consultant should be meeting a short-term need in your organization. Clarifying a timeline for meeting that need will help make the consultative experience successful for both the consultant and the

Head Start or Early Head Start program. Put expectations for the work in writing and establish specific times when you will check in.

- **Be clear about what you want the consultant to do.** Sometimes you want a consultant to help you set and achieve a goal, but other times you might want someone who can analyze how well you are meeting an established goal.

Monitor the Consultant's Work

- **Monitor the consultant's progress.** Put expectations for the work in writing and establish specific times when you will check in to see if what is being provided is meeting the program's needs. If it isn't, have an honest conversation with the consultant about what to change and how to make the adjustments.
- **Establish and maintain open communication with your consultants.** Share what works in your program but especially what is not working well. The more the consultant understands how your program is organized and how the service areas are integrated and function together, the more effective the consultation services can be.
- **Telephone conferences and long-distance consultation can be both effective and efficient.** Technology is an effective tool for communicating and monitoring progress. Work with consultants may not involve onsite visits; yet program information, policies, procedures, documents, forms, and data can be exchanged continuously. Time between consultation calls allowed members of the management team to work together to refine and develop policies, procedures, and systems and to receive written feedback and resources from consultants.
- **Use action plans.** They promote the accountability of all involved.
- **Build in some metrics.** Any time you engage a consultant in your organization, be very clear about how you will be measuring achievement and success.

Reflections

- **It is okay to admit that you don't know something.** Let the consultant know you need help in a particular area. Be honest about your challenges and expectations, and clearly articulate your desired outcomes.
- **Relationships matter.** Consider the importance of relationships and trust when working with a consultant. Sometimes bringing in someone with whom you have a prior relationship is important; other times you might want to select a consultant who doesn't have an existing relationship with your program and can then better serve in a neutral role.
- **Implement a pre- and post-assessment** of program staff's knowledge along with a final evaluation from all parties to enhance future consultations.
- **Be cognizant of the fact that you may not like what they tell you.** Depending on the project or goal, the program (director, management staff, program staff, Policy Council, etc.) needs to be open to listening to the consultant and then confident in making informed decisions about next steps.
- **Reflect on the consulting experience.** Document all completed work and take time to reflect on what transpired; this reflective process can support learning from the content the consultant provided and from the processes that he or she may have used during the work.
- **Celebrate successes** and learn from your mistakes.

