



HOW TO HIRE CONSULTANTS

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Because faith-based institutions are unique, they rarely benefit from consultants who offer prepackaged presentations that feature generic data and lead to predictable conclusions.

In the world of theological education, one size doesn't fit all. The goal in hiring a consultant is to access effective counsel tailored to a school's specific needs. As different as seminaries are in size, tradition, and mission, they can increase the likelihood of successful client–consultant relationships by considering certain guidelines.

Determine a need

Thinking about hiring outside expertise? First, answer two questions:

- **Do you have the talent and skills in house** to address the situation you're facing? If so, engaging consultants may be a time-consuming and costly way of reaching an obvious conclusion. Instead, roll up your sleeves and do the work.
- **Are you in the market for a consultant or a service provider?** The key difference: One helps create plans; the other implements plans.

Consultants work alongside clients to identify problems, define needs, evaluate effectiveness, recognize options, and consider responses. They may coach a governing board in crafting a strategic plan, but they don't write the plan. They might work with a development office to design a capital campaign, but they don't write the appeal letters or staff the phone banks.

By contrast, service providers perform hands-on tasks. It's possible that a school might engage a *service provider* to carry out a plan that the school has created with the help of a consultant. In such a setting, service providers do indeed write appeal letters and staff phone banks.

Identify the right consultant

The most desirable characteristics that consultants can bring to faith-based clients are a good ear and the ability to understand the client's culture. Consultants don't necessarily need to share

the denominational identity or personally subscribe to the institution's statement of faith. But they do need to be multilingual in a theological sense, understanding and appreciating a client's theological language even if it isn't their native tongue. They need to be good listeners, flexible enough to enter an institution's world that is vastly different from the world they regularly inhabit.

How does a school find the right consultant with the right skills for a particular project?

- **Ask around.** Contact institutions with similar values and request recommendations. Possible questions to ask colleagues about their experiences with consultants are: Could the consultants talk your talk? Were they effective communicators? Did they figure out your school's strengths as well as its problems? Were they good listeners? Did they arrive with preconceived notions and a list of set strategies to address those notions? Did they leave you with a clear understanding of next steps and the ability to take those steps unassisted? Would you hire this consultant again?
- **Check references.** Regardless of the glowing recommendations from peers, always check a consultant's references. If you were embarking on a building project, you would solicit multiple bids from contractors. Entering into an agreement with a consultant is no different since it involves spending institutional resources.
- **Don't be impressed by size.** Big isn't always better. Some large consulting firms boast client lists that include well known corporations and international nonprofits. But engaging such a firm might result in two problems: First, the firm might have difficulty in scaling back its work to serve a small client with a short reach and a limited budget. Second, the consultant assigned to you may be from the junior ranks and have little knowledge of the theological education sector.
- **Consider going outside the family.** Depending on the nature of the project, a school may benefit from hiring consultants outside its faith tradition or even outside the

religious community. Example: A school in need of investment counseling might want to tap the expertise of an established financial advisor from the secular world. A key to success is the consultant's appreciation for the school's mission and ethos.

- **Schedule an exploratory conversation.** Whether in person, by Skype, or on the phone, an in-depth conversation can reveal whether a consultant understands a school's needs and has the skills to meet them. Also important is determining if the "chemistry" is right. The school's president and other key personnel need to trust and respect the consultants and feel comfortable interacting with them. Total buy-in by all participants is essential. Just as school leaders are sizing up the consultants, the consultants are taking the pulse of school leaders. If they sense resistance to the idea of a consultation or what it might uncover, they may choose not to sign on.

Get it in writing

A contract between a theological school and a consultant can take many forms. Some are multipage documents, dictated by a risk-management staff, and written in fluent legalese. Others are simple letters of agreement that outline needs, services, fees, and deadlines. Any boilerplate document, initiated by a school or consultant, can be amended to address concerns.

Four clauses to consider:

- **A "not-to-exceed" clause.** This is a cap that stipulates a ceiling on the consultant's fee. The cap ensures that final invoices contain no surprises that cash-strapped campuses didn't anticipate.
- **Confidentiality clause.** The consultants agree not to identify the institution as a client or discuss the nature of the consultation with anyone. This silences consultants who may be tempted to engage in name-dropping to build their reputations. The decision to go public with the relationship rests solely with the school. Also, the consultants guarantee anonymity to all campus personnel who share information as part of the consul-

tation.

- **Indemnification clause.** This protects a consultant who works with a school in dire financial difficulty. The client agrees not to sue the consultant if the consultation fails to return the school to solvency.
- **Escape clause.** This clarifies the cost of ending a relationship early. How much notification must one party give the other? What compensation can a consultant expect to receive for preliminary work that didn't produce tangible results? Who owns the rights to the research?

Increase the odds of success

Most theological schools don't have the wherewithal to make costly mistakes. In the case of hiring outside expertise, they need to get it right the first time.

To boost the likelihood of success:

- **Start small.** Before hiring a consultant for a major (and expensive) project, a school may want to assign the consultant a lesser task. This can enable campus leaders to assess the consultant's skills and style of doing business.
- **Try the team approach.** Hiring a team of consultants involves higher fees but may result in a more comprehensive action plan. For example, some consultants find it helpful to have an "interpreter" on the team—someone from the client's faith tradition who has no connection to the campus. The interpreter is available to explain the nuances of the religious affiliation to the consultant.
- **Don't wait too long.** Serious situations—sharp enrollment declines, severe budget crises, or failed leadership—cannot be turned around on a dime, even with the guidance of the most gifted consultant. Timing is everything. An early consultation may be money well spent. 

For additional information about working with consultants, contact Amy Kardash, director of programs for In Trust Center for Theological Schools, at akardash@intrust.org or 302-654-7770.

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