

TIPS FOR USING GRANTWRITING CONSULTANTS

INTRODUCTION

Many nonprofit organizations use grantwriting consultants to supplement staff capacity in fundraising. Situations vary. You may need a grantwriter because you have no staff assigned solely to fundraising or grantwriting, and use consultants when the Executive Director and other staff do not have the time to prepare a proposal – or feel they need additional expertise. Or you may have a Development Director or grantwriter on staff, but an important proposal is due right around the time of your annual fundraising event – or you have three proposals due within four weeks. Some organizations have regular grantwriting consultants. Your organization may have an agreement to use a consultant for a specified number of days per month, or simply have one or two consultants that you call on as needed, hoping one will be available.

Whatever the reason, grantwriting consultants are most often needed during a specified time period, to make a set-in-stone deadline. This fact – the need for someone to complete a grant application with or for you in a limited period of time – contributes to many of the challenges of hiring the right grantwriting consultant and making the best use of her/his skills.

Taking the time to hire the right consultant and provide appropriate support and supervision pays off in the long run. An effective consultant needs information and access, to learn about the organization and to understand and meet your needs. By spending time “up front” in hiring and supervision, you can build a strong and effective relationship with one or more grantwriting consultants. As with staff, this will reduce the time and effort required later, and help ensure a mutually beneficial relationship with your consultant.

TIPS FOR HIRING THE RIGHT CONSULTANT

Following are some factors to consider in hiring the consultant who is right for your organization and your specific assignments.

Know what you need the consultant to do, so you can look for the right mix of skills and experience. Do you want a consultant to:

- Put together a proposal from information you have already gathered and a program design you have already developed?
- Interview staff, find epidemiologic and/or demographic data, and help design the program as well as writing the proposal?
- Work with one or more staff members in a team approach?
- Or something else?

Know whether you need a program specialist or a writer/editor. If the consultant is expected to work with staff to design the project, then s/he needs to know a lot about the subject

matter. If you have done the design (a more desirable situation, but not always feasible), then you are looking primarily for a good writer and editor who understands federal application requirements, has some familiarity with the subject matter, and understands how community-based nonprofit organizations work. If you hire a writer, you will need to take responsibility for the “content edits,” being sure that the project design is solid. If you hire a program specialist, s/he can search the internet for related research to support your program model and may have recommendations about how to structure the program. You can delegate some of the program development to such a person.

Never hire a consultant with the assumption that you can delegate program decision making. Even if you hire a “program developer” with years of experience, remember that this person rarely has in-depth understanding of your organization and your staff. Unless you plan to hire the consultant to run the project, this person is not responsible for implementing the plan developed. Your organization has that responsibility. Your program staff need to be able to carry out the proposed work plan and meet the timelines stated, so staff need to control decisions about models and methods. Staff also need to decide what to “promise” in level and types of services. You may defer to the consultant regarding how to organize the application, what to include in each section, and what information to emphasize. You probably will listen carefully to her/his recommendations about how to present information and how much to present. But you need to decide about program design, level of services, staffing requirements, budget, and other content issues. Be sure both your staff and the proposed consultant understand this.

Before hiring a consultant for work on a specific proposal:

- **If you don’t have someone in mind, begin to identify a pool of consultants.** Contact sister organizations and nonprofit technical assistance providers to identify possible consultants. The Foundation Center, some local foundations, and nonprofit technical assistance organizations may have lists and suggestions. Be specific about what you are looking for. It is ideal to identify possible consultants *before* you have a specific deadline in mind, so you have a pool of people to call upon when needed.
- **Obtain and review the application guidance or grant guidelines** as soon as it is available. Know the requirements, due date, attachments, and challenges of this application.
- **Outline a work plan with staff, deciding what you can do in-house and what you want the consultant to do.** Know whether you are designing a new project or expanding or modifying an existing design. Sit down with program staff to discuss the project scope and focus. Consider what written materials exist that document the project plan if it builds on a current effort. Then prepare a work plan that lists the various tasks required for proposal preparation, including finding demographic data or existing research, doing the budget, getting collaboration agreements, and preparing attachments, as well as proposal narrative preparation. Set deadlines, and decide who should do what. Now you

know what you need the consultant to do, and can describe the assignment very clearly.

- **Decide whether you are looking for a writer/editor or a program specialist who also writes proposals.** Be clear on the amount of content knowledge needed.
- **Estimate level of effort.** How many days should this take, over what period of time?
- **Know how much money you have available.** Decide what you can afford to pay, and consider whether you would prefer a fixed price or per day arrangement. Do NOT agree to pay the consultant out of project funds if the project is funded. It is generally illegal to use project funds to pay for work done before the grant period began or to use direct projects costs for a grantwriting consultant. Hiding these costs is unethical.

In choosing a consultant:

- **Clearly state your expectations, including tasks, deadlines, how you want to work together, and funds available.**
- **Interview potential consultants in person,** asking consistent questions of all candidates. Ask for and carefully review a resume. Ask how long they have been writing proposals, how many they have written to various sources, and whether they have worked full-time in development. Ask about specific background in the subject area, experience writing federal proposals in response to RFPs (if applicable), experience in working on deadlines, success rates in terms of whether proposals were “approved” (rated high enough to be considered for funding, even if not actually funded). Ask about experience working with organizations similar to yours. Look for evidence of knowledge of and commitment to community-based organizations and communities of color or specific target populations. Be sure to ask all applicants how they like to work, such as whether they are comfortable working in a team or prefer to interview people and then do independent writing. Find out if they want to work at home or at your location. See if they are comfortable providing a content outline and initial drafts well ahead of the deadline. Decide if you have “good karma” and complementary work styles. Be sure the consultant understands exactly what you want and is prepared to provide it. Discuss funds, and be clear about how the fee is to be set. Ask if they belong to the Association of Fundraising Professionals (formerly the National Society of Fund Raising Executives), or some other professional organization. Have program staff who will be working with the consultant participate in the interviews.
- **Ask for writing samples,** including other federal proposals, and review them carefully to see if like the level of detail, writing style, and tone.

- **Ask for references and check them.** Ideally, find someone you know who has worked with this consultant. It is often hard to get honest assessments from strangers. If in doubt, call an umbrella group like the Hispanic Federation or Latino Commission on AIDS. Try to avoid hiring a consultant unless you can get a serious reference.
- **Clearly state confidentiality expectations.** You may want to explicitly require that the application content not be discussed outside the organization, particularly if you believe that other local organizations will be competing with you. A professional grantwriter should be careful about this, but problems around inappropriate sharing of information are not uncommon.
- **Once you make a hiring decision, prepare a clear and specific consulting contract.** You might ask the consultant to refine your draft application work plan to indicate consultant responsibilities and deadlines, or do it yourself. Make this a part of the contract. Be sure draft due dates are specified as well as a final proposal completion date that is at least two days before the submission deadline.

TIPS FOR WORKING EFFECTIVELY WITH YOUR CONSULTANT

Once you have hired the consultant, be sure you do your part to make the experience successful. Some suggestions:

- **Set a tone of regular but not overbearing supervision.** Set up regular meetings between the consultant and staff. Follow contract specifications regarding review of an outline or other interim products. Hold the consultant accountable for deadlines, and be sure staff respond efficiently so that you do not delay the process.
- **If possible, pair the consultant with a program or administrative staff member as primary contact.** Someone less busy than the Executive Director may be able to provide more timely assistance, and this can help the consultant become familiar with how the organization works. It can also build staff capacity in grantwriting.
- **Be sure staff are doing their part of the work.** A consultant cannot write the grant without needed input. Be sure staff are meeting their deadlines for information gathering or other tasks, especially early in the preparation period.
- **Be sure the Executive Director or another senior staff member is available if needed.** It is unrealistic to expect that a consultant new to the organization can work independently. You also want to communicate the priority you place on this assignment. Even if supervision of the consultant is delegated, be sure that s/he knows the Executive Director or another senior staff member is accessible.

- **Provide interim feedback, positive and negative.** If you are concerned about quality or deadlines, or if staff feel uncomfortable with interactions, deal with these concerns before they become major. If you really like what the consultant is doing, say so explicitly. Build a solid working relationship that allows the consultant to let you know if s/he is not getting needed staff cooperation and enables you to ask the consultant to modify work behaviors that may negatively affect the product.
- **Have an internal “drop dead” date for decision making.** If you have concerns about whether a competitive proposal can be prepared (for reasons that may or may not be related to the grantwriter), have an internal deadline in your mind for deciding whether to proceed. Be sure you have seen a draft from the consultant before that time and heard her/his honest assessment of progress and concerns. If you are uncertain about feasibility, be sure you have an “out” clause in the consulting agreement, or you may end up paying the full price even if a proposal is not completed and submitted. (One alternative is to include the right to shift the assignment to a different proposal, perhaps a foundation proposal.)
- **Link the consultant’s and staff’s work well ahead of the deadline.** Be sure all aspects of the application work plan are on schedule, including arranging for letters of commitment from partner organizations and preparation of a budget that is consistent with the project work plan and level of effort. Be sure no tasks have been dropped. Review the application checklist to be sure all required components of the application are in process. Be sure a staff member is responsible for ensuring that everything comes together; don’t leave this entirely to the consultant. Remember, it is hard for a consultant to “nag” staff about missed deadlines.
- **Debrief and build the relationship if desired.** Once the proposal has been submitted, debrief with staff and consultant (first meeting with staff separately if there were problems with the consultant). See what went well and what could have been done better, from both staff and consultant perspectives. Then decide with staff whether this is a consultant you want to use again. If so, tell the consultant, being sure to give credit and show appreciation. Be sure you pay the consultant promptly. Agree to let the consultant know the outcome of the submission. Offer to provide a reference if desired.

A good grantwriting consultant is incredibly valuable to your organization. If you can build a solid relationship, you will be able to call upon the same person over several years. S/he will know the organization and its work, and will require less supervision than a new consultant. You will be comfortable about quality. And the stress of preparing major grant applications will be significantly reduced. So keep looking for the right consultant, treat him/her well, and build for the future.