

How To Use a Consultant

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EVERY year, thousands of school districts across the country, ranging in size from the smallest to the largest, decide to use educational consultants. Such firms and individuals may be sought on a short- or long-term basis, in a wide variety of capacities, for fees ranging from a hundred to many thousands of dollars.

Too often, once the consultant is hired, there is a tendency to assume that he will now take over in the problem area, with little further thought or action needed from school personnel. To assume this is to waste a valuable resource.

From the very start, and at every step along the way, client and consultant must work together—and, further, must do so in a completely open and honest way.

The Whole Story

The first step, of course, is recognition that a problem exists which may be best solved with outside help. To recognize a problem, however, is not necessarily to recognize its root causes. This is why full and open discussion with the consulting firm is so important. Through such frank exchange, it may become clear that the problem under consideration is only a manifestation of something deeper.

For example, a consultant was recently engaged to conduct workshops to acquaint teachers with new reading materials and teaching techniques. But the consultant discovered that no machinery existed for implementing this change in the school district's reading curriculum, and therefore recommended that teachers also receive training in decision making and that cooperation of high-level administration be sought.

A distinction should be made here between the consulting firm with a wide range of resources (including specialized consultants of its own) and the "package consultant," prepared to implement a specific program or technique. This product-allied consultant is not, and cannot be, concerned with other school problems, however closely related.

Sometimes, too, a speaker may be erroneously labeled a consultant. He may be a prestigious educator, capable of inspiring his audience and stimulating new ideas, but consulting works only on a two-way basis. One cannot consult "at" clients, only *with* them.

The professional consulting firm some-

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times finds itself competing against the university image adhering to professor-consultants whose services may, again, be valuable in many contexts, but who are unable, in view of other commitments, to probe a client's problems and to follow through as an effective consultant must.

Rule 1 for using a consultant might be stated:

1. *Expect your consultant to want to hear the whole story—not only the immediate problem, but all that led up to it.*

Accountability Through Shared Objectives

Once the consulting firm is familiar with the overall situation, it is possible to lead the client into the next necessary step. This involves stating expectations and objectives.

Clearly stated objectives, worked out by consultant and client together, are the key to accountability, which you must demand of your consultant. In the absence of shared objectives there can be no accountability, only justification.

The reputable consultant will also make an evaluation of his own work part of his contract.

Clearly, the consultant must do a fair amount of spadework before he begins to draw up a proposal. He must talk with key people and be given opportunity to explore the problem in depth, with assurance that confidences will be respected, at all levels.

Inevitably, such a consultant will ask a great many penetrating questions—not to put you on the spot, but rather to gather the information on which an intelligent proposal must be based.

Rule 2 might read:

2. *Expect your consultant to ask questions; and answer them honestly.*

It's Your Problem

The decisions, however, are not the consultant's but the client's. The client, after all, must live with whatever happens. The consultant may nudge, suggest, point out;

but a good consultant never allows his client to forget that solutions to problems must come from within.

The reputable consultant builds into his service a kind of automatic obsolescence. He tries to leave some of his own skills behind, so that the client can in effect act as his own consultant when a similar need again arises.

How does a consultant carry out this "teaching" role? As any good teacher does: by modeling the behavior that will enable his "pupils" to make informed decisions. He documents thoroughly, too, making the group's concerns, priorities, and decisions a matter of record.

In many ways, "unlearning" is as important as learning, since the consultant-teacher deals with adults, who may have developed preconceptions and bad habits. So it is necessary to present an experience in which the unlearning process can occur and in which past practices and procedures can be impartially examined.

All of this does not mean that the consultant is trying to phase himself out of business. Rather, if he does his job well, he may very likely be called in again, but this time at another level or to serve in some different capacity. So:

3. *Use your consultant, not to provide magical solutions, but to help you and your people to develop the skills and understanding to find solutions most appropriate for you.*

The Consultant as Referee

While the consultant plays a guiding, rather than assertive, role in working with clients, he is far from inactive. Conscientious consultants often run interference for their clients, and have been known to run risks with the client relationship as well, in order to ensure the success of a project.

A group of teachers was enthusiastically involved in an elementary science teaching program, with a consulting firm providing the training. Unfortunately, they and the consultants were the only ones who really knew about it.

Other teachers in the school viewed the new curriculum with emotions ranging from

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curiosity to uneasy suspicion. And there were practical problems: the janitorial staff, for example, was unprepared for forthcoming demands for equipment storage space. Their goodwill was necessary.

Only from the administrative level could there come communications which would allay fears and hostility and enlist cooperation. So the consulting firm took leadership in pointing out to the school principal the importance of his attendance at the teacher sessions.

Here we can formulate another rule:

4. *A collaborative relationship between administration and consultants—in which administrators keep in close touch with the project—is essential.*

"They"

In another instance, teachers being trained in an innovative approach to grouping children for independent study expressed pessimism about implementing the program: school policy would never permit it. Who determined this policy? Some faceless "they" at the administrative level, the teachers said.

The consultant assumed the role of referee, assigning three of the teachers to investigate the restrictive policy. At the next session, they sheepishly reported that not only was there no "they"; there was no such policy, either.

"They" is a common organizational issue that must frequently be identified and dealt with by consultants. "They" in one school turned out to be a single individual. He was invited by the consultant to confer with the group and did so good-naturedly, with productive results all around.

5. *Expect your consultant to fill a third-party function, acting as mediator when necessary and being sensitive to circumstances which may compel this.*

Paying the Consultant

The consultant's fee should be based on the job, as opposed to a set number of man-days. It is reasonable to work out a fee with your consultant, based first on the needs, and then on a balance between what you are able to spend and what he can deliver for that sum.

Consultants often work on a step-by-step basis, initially identifying the problems while being paid per diem, then offering a project proposal.

In any case, you should discuss money as openly and honestly with your consultant as you discuss the problems with which you seek his help.

6. *Expect to negotiate the consulting fee.*

Choosing a Consultant

For some who read this article, how to use a consultant may be less urgent than how to choose one. These brief guidelines may help.

1. Do you trust the consultant's judgment? Are you philosophically in tune?
2. Does his past performance speak well for him? Check his credentials and references.
3. Is he a person of integrity? Does he respect confidences? Does he himself insist on honesty? (Would he, for example, refuse to withhold information from people against whom it might work later?)
4. Does he study your problems and seek your help in formulating objectives?
5. Will he give you a written proposal?
6. Does he base his fee on the job to be done?

In the long run, of course, the most rigorous screening is only as valuable as the extent of the client's willingness to respond to the questions the consultant himself must ask. The client who readily discloses his own uncertainties, establishing an atmosphere of openness and trust, has already taken the first big step in choosing and using a consultant wisely and well. □

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