IN IT TOGETHER

THE BEST ASSOCIATION-CONSULTANT RELATIONSHIPS START WITH FRANK DISCUSSIONS AND OPEN MINDS

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Requests for proposals have come a long way since the days when associations routinely sent them out en masse, requesting responses that would break a CEO’s desk. The best RFPs today are focused on essentials—and paired with conversation.

**BY MARIA MIHALIK**
The primary purpose of the Associations Now Guide to Consulting Services is to help you find association industry consultants to facilitate or strengthen your organization’s work.

Should you hire a consultant? Maybe. I’ve been in the association industry as staff, a volunteer, and a consultant for almost 30 years. From where I sit, here are five key ways in which consultants can provide value to associations—and one key area where they can’t.

Deep focus and speed. You have a complex day job with many responsibilities and demands. Consultants can focus intensely on a particular issue for you—for example, they can collect and analyze relevant data, draw conclusions, and make recommendations for your consideration—all while you and your staff carry on with other critical tasks.

Subject-matter expertise. Consultants can provide expertise that your staff members lack for a specific situation. For instance, when a board member is in the news in a not-so-flattering way, a public relations consultant can help you formulate and implement an effective crisis communications plan.

Fresh perspective. Consultants can bring an outsider point of view. There are times when your association’s challenges are genuinely unique but others when, perhaps unknown to you, they are not. Consultants, often with years of association experience and hundreds of clients, can see commonalities across organizations. Sometimes, with their fresh perspective, they can make contributions that are at minimum thought-provoking and occasionally game-changing.

Added credibility. Sometimes you know what needs to be done, but your board needs to hear it from a specialist or external party. A consultant can be that objective and authoritative voice. I’ve seen certification staff budget requests repeatedly declined until a consultant informs the board that the legal defensibility of its program relies on a current practice-analysis study and—boom!—budget approved.

Objectivity. Since consultants are not permanently connected to an association, they are largely immune to organizational groupthink or politics. They are uniquely positioned to ask probing questions, challenge the status quo, and arrive at an honest, objective assessment for leadership to consider.

Consultants can do all these things, and they can jump in the line of fire on controversial issues and fall on the sword if things go wrong. But they cannot make the tough decisions. It is one thing to recommend a new million-dollar initiative or a total governance redesign, but it’s quite another to decide to implement. The former does not have the financial, cultural, or political consequences of the latter. So, while the consultant can provide expertise, context, and recommendations, only association staff or volunteer leadership can give the green light.

If you think you can benefit from a consultant’s assistance with a current or upcoming project, browse this guide to review the many ASAE member consultants available to help. And be sure to keep it on your bookshelf in case a need arises later.

Mickie Rops, FASAE, CAE, chair of ASAE’s Key Consultants Committee, is president and chief credentialing strategist of Mickie Rops Consulting, LLC, in Indianapolis. Email: mickie@msrops.com
GREAT EXPECTATIONS
The best client-consultant relationships begin with frank conversations and all-in attitudes

Fundraising consultant Jennifer Harris, Ph.D., loves the thrill of helping associations land major gifts from philanthropists. An award is, among other factors, tangible proof that the consultant-client collaboration was a success.

But ending up with a major gift also starts with one—the gift of candid conversation, in which both parties establish at the outset what will be necessary to build transparency and trust. “Without trust, consulting doesn’t work,” says Harris, senior vice president of Graham-Pelton, a fundraising and management consulting firm for nonprofit organizations.

Here are a few of the elements Harris tries to establish when she engages with an association.

STRAIGHT SHOOTERS
“Early on, before we get to a proposal, I candidly ask ... about key issues and activities that need to change,” says Harris. “Not everyone is willing to open up and share their dirty laundry,” but talking frankly about how she can be of service leads to better, more targeted work.

Harris stresses to clients the importance of maintaining a constant flow of information back and forth. Depending on the project, she lets clients know they can expect weekly touchpoints from her via an in-person meeting or a phone call.

“This is an opportunity to be transparent about our activities and make sure they’re comfortable,” she says, and “course-correct if needed.”

IN IT TOGETHER
For its part, an association should commit to keeping an open mind.

“Make sure you’re going in with a partnership mentality,” says Harris. “It’s really simple, but really important. ... We want to be a great partner ... and not just offer pat solutions. True partnering is thinking boldly about new ideas.”

Harris is emphatic about two-way input. “I don’t want someone being a ‘yes man,’” she says. “You need a healthy balance of active listening and engagement, and then pulling on each other to get to the best place.”

She points to a recent pitch with a CEO who “really challenged me. I love that,” she says. The willingness of the association’s staff to participate and not just passively accept advice ensures that the plan that emerges is positive and strength-based.

Good clients also appoint a project manager who can juggle details, focus on follow-up and follow-through, and “streamline our connecting with each other,” says Harris. “If the client is never able to talk, that’s a warning sign.”

Last, but not least, she advises, remember that collaborating on a project can be fun and rewarding.

“I think it’s really exciting to delve into the work and figure out better solutions. When you go into working with a consultant, it’s about elevating your mission,” says Harris. “Remind yourself of how impactful your work is for others. That’s why we’re in the business.”—Maria Mihalik
COMING TO TERMS

Before you sign a consultant agreement, explore whether you can cut costs with these three negotiating points.

You've found each other, and the attraction is mutual: A consultant seems to understand what your association needs and you're keen to work together. Before you sign on the dotted line, consider this expert advice on bottom-dollar due diligence to ensure that you're spending your consulting budget in the wisest way possible.

**Sit in the passenger seat.** Letting the consultant drive the initial conversation might save you money. When asked, “What might it cost to accomplish this project?,” a good consultant should answer the question with more questions.

Robert Olcott, FASAE, CAE, regional director with investment consulting firm DiMeo Schneider & Associates, LLC, says his reaction to this query is always the same: “I can’t provide an answer until we have additional probing questions to get at specifics” of the requested work, he says. And “it’s not a dodge,” but rather a two-way process: “Sometimes there’s a difference between what [the client thinks] they need and what they actually need.”

If the consultant sees a way of “getting from point A to point B” in fewer steps or with a different approach—fewer in-person meetings and more by Skype, perhaps—he or she will probably suggest it, says Olcott. Changing up other variables, like the project’s timeline, might also affect cost.

**Seek standard service.** “Customization almost inevitably drives costs higher,” says Olcott. “For example, with an organization that hires us to manage their reserve fund, we produce a quarterly performance report and send it to the staff, [who] in turn share it with the investment committee. If the association comes back and says they like it but they want four other versions, it requires customization and may or may not add additional costs.”

**Meet in the middle.** There may be times when a consultant’s desired compensation is not only not in the same ballpark as your budget, it’s not even in the same zip code. What to do?

“If it’s significantly out of scope for what I can afford, I don’t try to negotiate,” says Julie Coons, CAE, president and CEO of the Northern Virginia Chamber of Commerce. Even if an epic negotiation were possible, she still wouldn’t attempt it. “The consultant has valued their work at that level, and it doesn’t matter what my opinion of [their worth] may be. If I said, ‘Do you think you can do it for half?’ I’m likely to get half the quality of work,” she says.

A less daunting gap might be another matter. “If it’s within 20 percent or something like that, can they meet me halfway?” she says. If the answer is no, she explores two questions: “Is there something within this scope of work that is causing that work to be a bit higher?” And “Can you help me understand whether [the sticking point] is essential or relevant to the other deliverables?” Jettisoning that portion of the work—or, as Olcott suggests, providing some resources yourself—might move the conversation from deal breaker to done deal.—M.M.
4 CONSULTING LESSONS FROM GDPR

The General Data Protection Regulation sent many associations scrambling for outside help with compliance. Here are takeaways from one organization’s partnership with a consultant on the project—and they’re not about data.

1. Don’t jump to a solution before you’ve done an analysis.
   Barkan says GDPR so spooked some associations that they stopped doing business with anyone in Europe. “This is complete risk mitigation, but it’s not doing business properly,” he says. “[Imagine] how much more successful you could be if you had good strategy and guidance.”

2. See the little picture.
   When the GDPR work began, “we were doing a large system upgrade at the same time,” says Sean Hare, IMA’s vice president of information technology and operations. Despite the upgrade and the complexity of GDPR compliance, Barkan “had a very practical view of how it [could] be achieved” and broke it down into smaller, manageable steps.

3. Row in the same direction.
   “If I ask 11 different people, ‘What does success [for this project] look like to you?’, I’ll get 12 different answers,” says Barkan. To achieve a good result, the board, senior management, and staff need to share a similar vision of the desired outcome.

In IMA’s case, the goals included not just reaching GDPR compliance but also being “a world-class leader in data protection and user privacy rights,” Hare says.

4. Anticipate resistance.
   “Change might mean people have to work in a different way or give something up,” says Barkan. With GDPR, this meant altering how information is collected at meetings, how prospect lists are built, and more. Barkan’s strategy? Focus on solutions that work for both the organization and the individual.

All of this added up to a productive relationship that generated trust between IMA and their consulting partner. “We were far more successful with him than without,” Hare says.—M.M.
REQUESTS FOR PROPOSALS HAVE COME A LONG WAY SINCE THE DAYS WHEN ASSOCIATIONS ROUTINELY SENT THEM OUT EN MASSE, REQUESTING RESPONSES THAT WOULD BREAK A CEO’S DESK. THE BEST RFPS TODAY ARE FOCUSED ON ESSENTIALS—AND PAIRED WITH CONVERSATION.

BY MARIA MIHALIK

In a letter to her board of directors, Addy M. Kujawa, CAE, CEO of the American Alliance of Orthopaedic Executives, told them she would not be doing something they had come to expect: sending out a request for proposal (RFP) for a vendor to handle all the expo logistics for AAOE’s annual meeting. Her reason was every association professional’s dream: The last RFP had turned up an “amazing” consultant who communicates regularly, provides timely responses, and comes up with both money-saving and money-making ideas.


While a good RFP may not have been the only factor at play here, Kujawa—like most association executives—knows how essential a well-handled RFP is to a great project outcome.
GET IT IN WRITING

Today’s best-written RFPs have three things in common:

**They’re tightly focused.** Given the financial outlay involved, it’s understandable that associations might have a “more is more” approach when deciding what to include in their RFPs and what information to request from respondents. However, “responding to an RFP takes up a huge amount of bandwidth, especially if you’re small or solo,” says Kerry Stackpole, FASAE, CAE, CEO and executive director of Plumbing Manufacturers International and a longtime association consultant.

Stackpole has seen associations “throw in everything including the kitchen sink, and all that does is take away from the core messages.” Those core points, he says, should answer the question, “What are you trying to accomplish?” Sounds simple enough, but “finding clarity about that can be very difficult,” he says, especially for project managers who see the challenge at hand as a problem that a consultant needs to “make go away.”

**They tap technology.** In his work with Bloch & Reed, senior consultant Chris Brown, CAE, helps associations and other nonprofit organizations transition to or change association management companies. He works both sides of the equation, helping the hiring organization to craft an RFP and interested AMCs to write a response. For him, a winning RFP is comprehensive but manageable and easy to navigate.

“Make your RFP streamlined by using technology,” says Brown. “Use links and SharePoint where respondents can go straight to [your] site and pull up documents” rather than cramming every bit of relevant information into the RFP.

Video is another tool Brown recommends to enhance the RFP process. He helped one association conduct an executive search by asking respondents to submit videos of themselves to augment their written replies. “This allows you to get a different idea about a prospect,” says Brown. The RFP might ask respondents to talk about their consulting philosophy or how they led a similar challenge for another client, he says.

**Requests for information.** RFIs are effective for screening candidates before sharing a full RFP with them or for small projects. The document helps each side to quickly determine their interest in each other. Kujawa used an RFQ during her search for a strategic planning facilitator to understand the candidates’ approach and what they would need from her. She provided information about the project’s scope and her goals, budget, and timeline, and asked them to respond to just six questions.

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**RIP, RFP?**

When American Association of Orthopaedic Executives CEO Addy M. Kujawa, CAE, realized that some highly qualified consultants won’t respond to an RFP that requests a long, detailed proposal, she started incorporating other tools into her searches:

**Request for qualifications.** RFQs are effective for screening candidates before sharing a full RFP with them or for small projects. The document helps each side to quickly determine their interest in each other. Kujawa used an RFQ during her search for a strategic planning facilitator to understand the candidates’ approach and what they would need from her. She provided information about the project’s scope and her goals, budget, and timeline, and asked them to respond to just six questions.

**Request for information.** RFIs are best when project managers basically know what they want—like when Kujawa needed a new AMS vendor, for instance—and are looking for a way to compare consultants’ qualifications, staff-time requirements, and costs. Easy to prepare, they are well suited for small associations with staff and budget constraints.—M.M.
They avoid casting the net too widely. Many association executives and consultants agree that RFPs can generate better leads when the hiring association targets the kind of consultant it’s looking for. Cookie-cutter requests sent to dozens of prospects can make potential respondents “wonder why they got [the RFP] … or not be sure if they want the work,” Stackpole says.

Even worse, a generic RFP can be a signal to consultants that they might end up as what Stackpole calls “cannon fodder.” He recalls getting an out-of-the-blue email from a large association asking if he’d like to respond to its RFP for management consulting. “It arrived on a Tuesday and was due Thursday,” he says. “I read it and thought, ‘I’ll crank it out.’” He hand-delivered the response—and heard nothing.

Stackpole says his experience is not uncommon. One reason? A project manager may already have a consultant in mind, but the board or leadership requires that multiple RFPs be sent out.

GET ON THE PHONE
Nothing beats an actual conversation, says Brown, for answering “an age-old question: How do you link up with the best [consultant] who can fit within the culture of your organization and deliver the outcomes you want?” That’s where RFPs are limited, he says. “There’s only so much you can see on the screen. Until somebody picks up the phone and says, ‘This is what my problem is,’ we don’t know if we’re a good fit or not.”

Fit—and personal connection—are non-negotiables for Kujawa, who talks with each of her final candidates. “Understanding a personality is important,” she says. Some consultants, for example, “pride themselves on being very blunt. There are people who are right for them, but it’s not me.” A phone conversation can provide a glimpse into intangibles that can’t be conveyed in a consultant’s written response to an RFP, she says.

Stackpole talks to each of his final candidates, too—but all at the same time. When he’s searching for a consultant, he sends an EOI—expression of interest—to about a dozen individuals or firms; those who say they want to hear more receive his RFP. The next step is a conference call in which the candidates can ask questions of him—and each other. “It’s a more open and engaging process,” he says.

It’s also important to make preliminary phone calls to candidates recommended by peers, Stackpole notes. A discovery phone call like this allowed him to bow out of a potentially lucrative consulting job for which he had been recommended and to suggest a more suitable firm.

Kujawa recommends direct conversations as part of due diligence, especially when there might still be doubts at the end of the RFP process. “We all don’t trust our guts enough,” she says. “Make one more call and ask more questions. Do what you have to do to have a really firm, positive kickoff.”

MARIA MIHALIK is newsletter and supplements editor for Associations Now. Email: mmihalik@asaecenter.org

When you want to improve the taste of your tomato sauce, knowing the basic ingredient is tomato just isn’t enough information.

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Knowing the basic ingredients for a good event isn’t enough.

With Experient in your kitchen, every Italian grandma will envy your tomato sauce.
What is one contract term that every consulting agreement should include, and why?

**Q&A**

**TRACY KING, MA, CAE**  
**CEO AND CHIEF LEARNING STRATEGIST**  
**INSPIRED**  
**MINNEAPOLIS**

Contracts are naturally transactional, detailing outcomes, terms, and protections should things go sideways. These are all necessary but fail to acknowledge that consulting is inherently relational. We’re not offering an insert-coin-turn-crank output, but a co-created solution tailored to the organization’s unique positioning, resources, and constraints. Which is why commitments about the journey in addition to the destination should be more than a conversation during the proposal process, but extended through the contract, scope of work, and onboarding. This secures our shared investment in a collaboration that produces amazing results.

**CYNTHIA MILLS, FASAE, CAE**  
**FOUNDER, PRESIDENT, AND CEO**  
**THE LEADERS’ HAVEN**  
**CHARLOTTE, NORTH CAROLINA**

Agreements should, simply put, be an expression of the mutual intent of two partners wanting to do great work together. The most likely place for misunderstandings to occur is in the scope of work. Clarity is critical. Understanding exactly what the work product will be, delivery schedules, roles of each party, mitigation factors for failure of either party to perform in a timely way, communication preferences and expectations, and specificity of anticipated outcomes are all essential aspects of scope of work. If those are done well, all the other clauses around dispute resolution, insurance, and indemnity become happily irrelevant.

**IRVING WASHINGTON, CAE**  
**EXECUTIVE DIRECTOR**  
**ONLINE NEWS ASSOCIATION**  
**WASHINGTON, DC**

Every contract needs a clear statement of work terms that fall within the scope of an independent contractor relationship. As we move into a gig economy, associations are using more contractors to support their work. It’s essential that executives consult with their legal counsel to ensure that the nature of the work doesn’t classify the contractor as an employee. The degree of control exercised over the job and specialization of the work are factors that come into play. As state laws continue to change, a wrong classification could pose a liability issue for your organization.

**CAREY GORYL, MSW, CAE**  
**EXECUTIVE DIRECTOR**  
**ASSOCIATION OF STAFF PHYSICIAN RECRUITERS**  
**OKEMOS, MICHIGAN**

Every contract should include a super-clear scope of work with intended outcomes. It will help clarify your timeline and expectations around quality, and it will support any basis for termination should the relationship go south. A clear scope of work also helps any successor better understand the reasons for the initial agreement should the association have a staffing change.
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All listings in this directory are paid listings. Information was provided by each company.
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- Publishing | Media | Social media | Digital
- Web services (development | design) | Content strategy

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- Investment consulting | Advisory

### GOVERNANCE | STRATEGY | FUTURES THINKING
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- Governance | Board development | Strategy consulting
- Leadership development | Organizational development | Ethics

### MARKETING | MEMBERSHIP | MEETINGS | REVENUES
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- Fundraising | Development | Grant proposal writing
- Marketing services | Branding | Design | Writing | Sales
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Washington, DC 20036
Don Neal, Founder & CEO
202-660-1600
hello@360livemedia.com
www.360livemedia.com
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