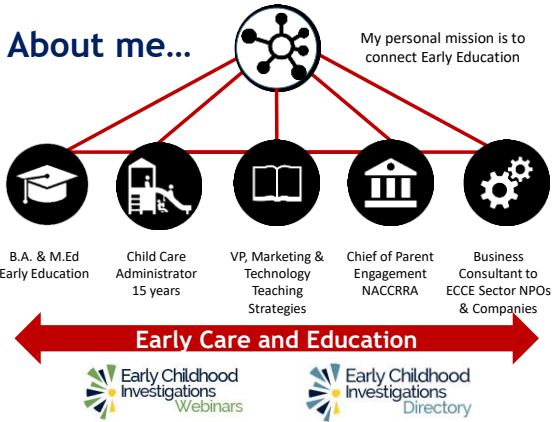


Working with Consultants:



Tips for Maximizing Your Program's Use of External Experts in Early Education

Fran Simon, M.Ed. | Early Childhood Investigations Consultants Directory



Objective: Today you will...



- learn strategies to help you prepare for, identify, and hire consultants.

Agenda

- Twelve (plus) tips for working with consultants from planning through after the engagement is complete.



- Questions

POLL

You are here because you...

- are considering hiring a consultant, or are working with one now.
- are a consultant looking for ideas to help your clients use your services.



Poll

Which types of consultants are you likely to hire in the next two years?

Select all that apply!

- Professional Development trainer or developer
- Business consultant or provider (accounting, lawyer, marketing, HR, website, back office help)
- Organizational or leadership (change management, strategic planning, board consultant, fundraising/grants)
- None
- Other.. Type in the chat box

Regardless of the type of consultant you need, it's all about **change** and building an organization of continuous quality improvement.

Are you ready?

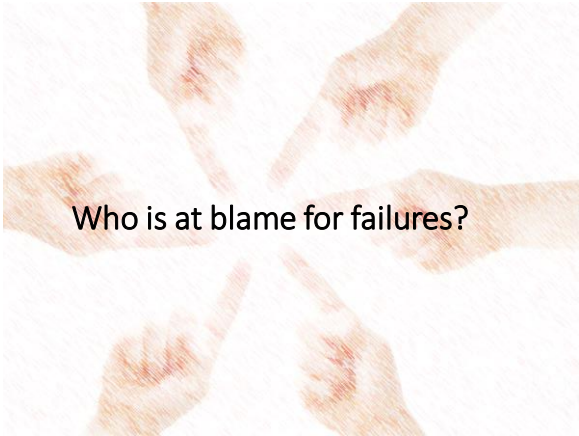
Have you ever felt this about working with consultants?



Or, have you thought this about working with consultants?



A series of horizontal lines for taking notes, consisting of two groups of seven lines each, one above and one below the central text blocks.



The steps you take...



Will ensure you get the most from your engagement with consultants.

Before you even find a consultant



Realize. It starts with you.

1.

Empower yourself
to take charge of the problems
you are trying to solve and the
relationships you need to solve
them.

2.



Prepare
yourself & your organization

2.a. Gather your internal team



2.b. Identify a primary contact



2.c. Find the right time to engage



2.d. Define your vision. Change is coming



2.e. Continuous Improvement requires ultimate self-sufficiency. Plan for transfer of knowledge.



3. Develop a coherent and comprehensive Statement of Work



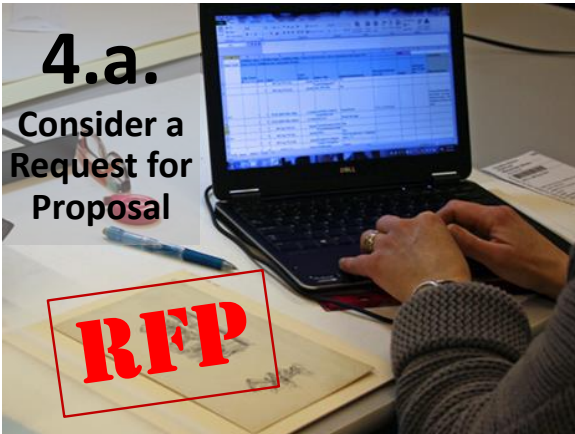
The beginning of "during"

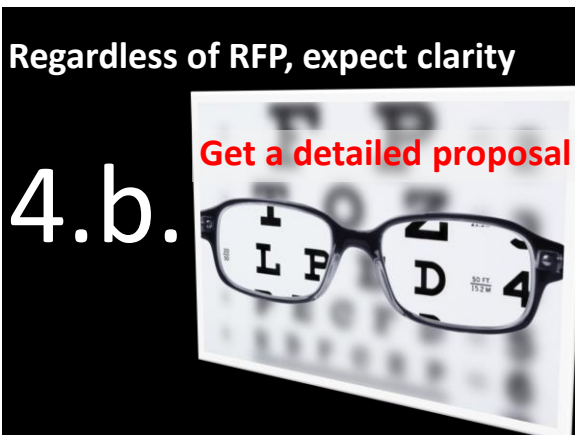


Search for the right consultant

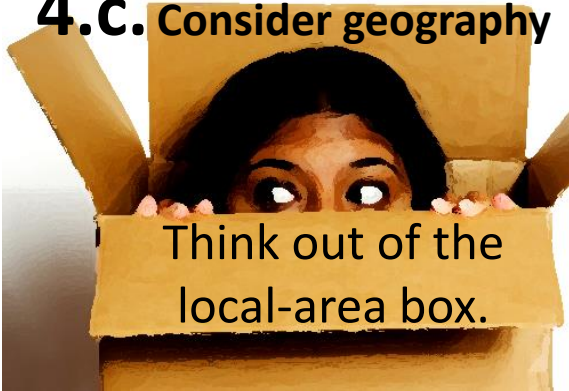
4.







4.c. Consider geography



4.d. Become informed

DUE DILIGENCE



- References
- Internet & social media search
 - Work samples
 - Background check?

Enter into a contract



5.a. Basic elements of contracts

- Description
- Schedule
- Ownership
- Payment
- Warranty
- Confidentiality
- Cancellation
- Statement of Work

5.b. Description: Scope of the project, key tasks, and purpose of the agreement.



5.c. Schedule: Project deadline, timelines and deliverables.



Make the process iterative

5.d. Ownership: Rights to the final work; the intellectual property or copyrights, "work for hire," or licensing, royalties.



5.e. Payment: Amount and form of payment. Terms of payment, fee restrictions, expenses; Type of fee: Retainer, flat-rate, hourly, day rate



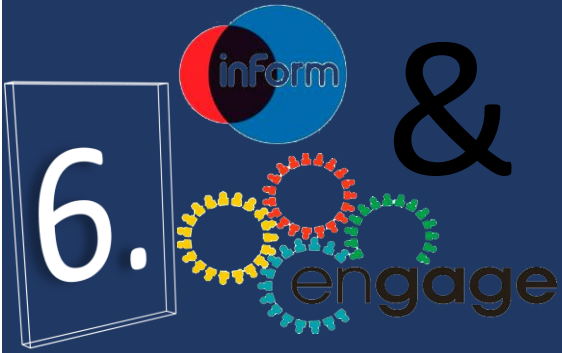
5.F. Warranty: Written guarantee for the integrity of the work; consultant's responsibility for remedy; client's responsibility for informing consultant of a need to remedy.



5.g. Confidentiality: Protecting trade secrets. The legal penalties for sharing confidential information.



Communicate with staff



The middle of "during"



Provide access

7.



YOU play a huge role

8.



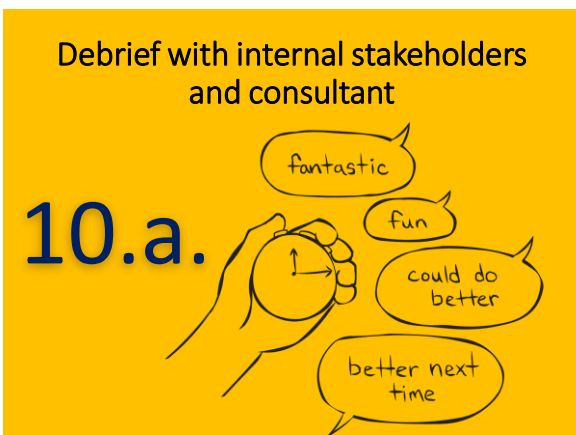
**Manage and supervise
internal cooperation**

9.





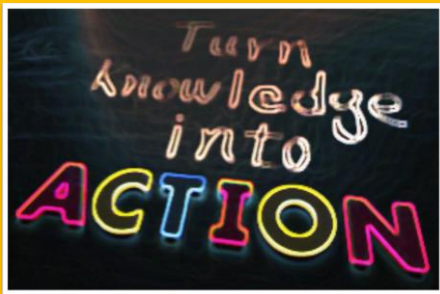




10. b. Plan and assign next steps and outcome measures



10. c. Implement with clear expectations



10.d. Measure results and analyze



10.e. Refine



Pay on time

11.



12. **BONUS!**



Resources

[Strategic Use of Consultants: A Guide for Head Start and Early Head Start Leaders](#), ECLKC, Head Start

[Non-Profit Consultants: How to Choose them, How to Use Them](#), First5LA

[Sample Request for Proposal \(RFP\)](#), the Denver Foundation

[Sample Interview Questions for Consultants](#), the Denver Foundation

[How to Use Consultants](#), Lean Systems Institute

[When to Use Consultants—and When Not to Bother](#), National Federation of Independent Business (NFIB)

[NFIB Archived Webinars](#)

[Why hire a consultant?](#) The Denver Foundation

Thank you

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Engagement Strategies
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Organic SEO Consulting and Training for Marketers
 The Munn Group
 SEO Consultant

Tim Waxenfelter
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 Partner & Co-Founder

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 Site Supervisor/Master
 Teacher/Mentor Teacher - via pre

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 Designer and Strategic Thinker -

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 Amanda Schwartz Consulting
 Lead Consultant

Michelle Hagan
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 Consultant & Trainer

Faith Rogow
Helping people learn from media and one another.
 InsightsEducation.com
 Media Literacy Education Maven -

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Meet a few of my colleagues...

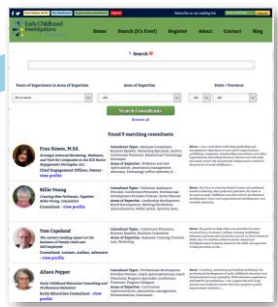


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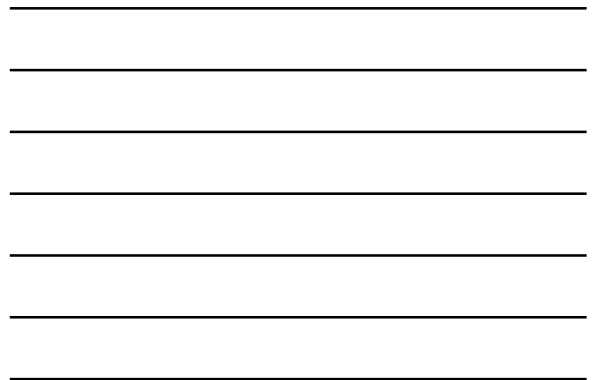
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