

## Offering Organizational Development Support through a Consultant Pool— Lessons Learned

### 1. Grantee Should Initiate

Publicize the availability of organizational development resources, but recognize that doing internal work requires readiness and buy-in on the part of all stakeholders in the organization. Time and energy focused on organizational development will inevitably detract from programmatic attention. For a successful engagement, the right time for an organization to turn its energies inward should be dictated by the grantee based on its own lifecycle and readiness. Staff and other stakeholders must be able to factor time for organizational development work into their workplans and priorities.

### 2. Offer a Simple Application and Approval Process

Make it easy for grantees to seek assistance and be sure that the entire process is transparent at the outset. Before a group decides to apply for resources or consulting it should be given full information regarding how the process works and the parameters of the program.

### 3. Confidentiality is key

Ensure that the grantee is able to openly confront its difficult issues. Insulate the program officer responsible for general or programmatic support from knowledge of the specific details of the organizational development work. Be clear at the outset that the work of the grantee and consultant is confidential. The program officer can be advised of the general scope of work that is being undertaken, the state of progress and overall outcomes. At FACT we do this through a Lead Consultant who manages the details of the program, and reports back on the broad outlines of the workplan and progress to the Senior Program Officer.

### 4. Choice is important

Allow grantees a choice in selecting the consultant; involvement in the selection process empowers the grantee. Interviewing providers may offer the grantee different perspectives on the problem(s) it is confronting and possible solutions. For some, who don't have prior experience with outside providers, the process enables them to gain an understanding of what to look for and how to make an informed choice. At FACT, grantees choose from two consultants that the Lead Consultant thinks are a match and which are selected from an already vetted team that we believe are a fit for our program and grantees.

### 5. Flexibility is essential

Successful capacity building must be flexible to take into account ever-changing external and internal circumstances. Be open to necessary changes in pace, emphasis or scope that will ensure success given emerging external or internal conditions.

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## **6. Engage the Executive Director throughout**

Involve the Executive Director (ED) in a formal way throughout the process. EDs have many responsibilities. Depending on the nature and scope of work to be undertaken, it may be appropriate for the ED to delegate responsibility for aspects of the organizational development work. However, it is imperative for a successful outcome that the ED is regularly updated and approves all decisions and new directions.

## **7. Employ a Whole Systems Approach**

Recognize that all aspects of an organization are part of one system. Changes in one area of an organization will have ripple effects in other departments. For instance, programmatic changes may need to be supported with changes to fundraising plans, to financial reporting or may require new or different types of administrative support. To effectively implement change, the implications and consequences for the whole organization must be considered and the entire organization must understand and buy-in to the new system or process.

## **8. Link Consultant Work with Other Resources**

Undertaking organizational development work may require a variety of skill-sets. Consider whether a team with different kinds of expertise might best serve the range of organizational needs. For instance, changes to programmatic work and decision making structures developed with an OD specialist may need to be supported by new fundraising plans developed with the support of a different consultant with the right expertise. Consider making small discretionary grants in combination with the OD assistance to support the overarching goals. Consider complementary forms of support to bring the needed variety of skills. For example, a small grant may enable a learning exchange with another grantee that has resolved a similar problem. And be sure to help the group leverage your investment through your relationships with colleagues in the philanthropic sector.

## **9. Build a Learning Team of Consultant Ambassadors**

Engage consultants whose background and areas of expertise aligns both with the needs and values of your foundation and your grantees. At FACT, we conduct a rigorous vetting process for our small pool of 11 consultants to recruit a talented and diverse group of providers with experience in grassroots community organizing. Since FACT pays the consultants directly to work with its grantees, we orient them to ensure that they can serve as ambassadors of FACT. Regular oversight is provided by the Lead Consultant. In addition, regular peer learning exchange is built into the MAP process so that consultants draw on one another's expertise and jointly develop tools and strategies to strengthen the field of capacity building for grassroots groups.

## **10. Evaluate at Two Levels**

Clarify at the outset what the grantee and the consultant will be expected to report and the basis upon which the endeavor will be evaluated. At FACT, we try to keep the evaluation and reporting process easy. Share reporting forms and benchmarks at the start. The most useful evaluations are rooted in the grantees own goals. Don't wait until the very end to learn that something wasn't working. Throughout the process, check in with both the grantee and consultant. At FACT, our Lead Consultant ensures the engagement is moving at an appropriate pace, is serving the need(s) and is a positive experience. By utilizing a Lead Consultant in this manner we maintain confidentiality between FACT's programmatic and organizational development support. Remember that it is hard to directly attribute specific programmatic victories to a particular capacity building intervention. And, be sure to also perform a comprehensive evaluation of your own program annually and make adjustments.