Bill of Rights and Responsibilities for effective Nonprofit Consulting Engagements
Adapted from [ImpactRising]

*The aim of this "Bill of Rights and Responsibilities" is for nonprofit consulting engagements to get off on the right foot and stay on track. An open discussion and agreement on these seven points can help both **nonprofit clients** and their **consultants** ensure that an engagement is positive and effective, allowing both sides to do their best work.*

***How to use the Bill of Rights:** This can be used as a basis for discussion by nonprofit clients and their consultants **before they begin** their work together. Then, if they wish to, consultants and clients could include it in their documentation for the engagement:*

1. *As a stand-alone document: the nonprofit client and consultant review, discuss, and agree to these as **ground rules** and sign to acknowledge their agreement; or*
2. *As **part of the written contract or agreement** for the consulting engagement: it can be adapted and customized and included in the scope of work or other written agreements.*

***This is a living document**: feedback and edits are welcome, and the hope is that it will be adopted, adapted, and shared broadly.*

Consultants and their nonprofit clients have both the right to expect and the responsibility to ensure:

#1: An explicit agreement of what a successful engagement looks like from the perspective of both the client and the consultant. For example, both sides should be able to complete the same sentence starting, "Our work together will have been successful if…" This should include how the engagement will advance equity within the organization.

Key questions to answer:
- *What do you think are markers of success?*
- *How much change do you want/expect?*
- *What is your level of flexibility in what the outcome looks like?*
- *Do you have the infrastructure to handle this type of change?*
- *How far in implementation do we want to go?*

#2: An upfront discussion on how justice, equity, diversity, and inclusion impact and will be addressed in the engagement. For all engagements (not just those explicitly focused on DEI), the client and the consultant create a shared agreement around how they will approach issues of equity, power, and privilege in practice. This should include an accountability process for addressing harm.

This conversation may include naming existing dynamics and challenges around power and privilege within the organization. It could also include developing some standard questions to ask throughout the engagement (For example: Who is going to be in the room? Whose input will be included? Who is part of the decision-making process? How does this advance equity within the organization?)

Harm includes repeated microaggressions, blatant disrespect, and perpetuation of inequitable systems and structures. As humans, we all harm others, whether intentional or not. We invite consultants and clients to commit to a process of acknowledging and addressing harm when it happens and learning collectively in relationship with one another.

#3: A written agreement on the scope of work that includes a timeline, benchmarks for success, budget, expectations, and key activities and deliverables. Expectations should include how the work will be done with and create more equitable processes. The agreement should also spell out how and when the scope of work will be reviewed and revised as needed.

Good scopes of work should include a timeline, benchmarks for success, budget, expectations, deliverables/major outcomes, resourcing (i.e. who does the scheduling). Examples of good scopes of work can be found here.

#4: An agreed-upon process for evaluating progress throughout the engagement and at the end. This includes evaluating the process itself as well as providing an opportunity for both the client and the consultant to solicit and give feedback to the other party.

Do not assume that your partner is a mind reader—it is important to set up a relationship where there is a continuous feedback cycle—both for the client to give feedback to the consultant, but also for the consultant to help coach a client on how to be a good consumer of consulting.

Consultants should get feedback and should share with clients how they learn and evaluate their own work—and have a way to share that information that goes beyond positive references. Evaluation can look different for different kinds of engagements and clients—it can include a continuous feedback loop throughout, 360 surveys at the beginning and end of an engagement, periodic anonymous surveys, interviews with key people, etc. The client and consultant should establish how evaluation will be done throughout the engagement.

Think of the consultant engagement as a learning community or circle for all of those involved, both consultants and clients—it's a safe place for conversations and doesn't have to be formal.

#5: A commitment to learn, explore, and share together in an open environment. Both the consultant and the client should be willing to speak up, ask questions, and say what's on their mind.

Rather than reinforcing the idea of an "expert" on one side and a "recipient or learner" on the other, we encourage each side to bring a transformative approach, and not just replicate the status quo. It can be easy to let past experiences influence the way you interact with a new client—instead, let go of those experiences and start fresh with an open mind and positive attitude.

#6: A commitment to full disclosure of all information that is relevant to the work and agreement around confidentiality. Relevant information can include (for consultants) any connection, relationships, or prior work and (for clients) community, political, or organizational issues that impact the work. Both sides should agree what is or isn't confidential, how they will share information within and outside the organization, and how to handle any conflicts of interest.

Both sides should have access to the information that they need to do their best work. This requires that both can trust that sensitive information will not be shared further.

#7: A shared agreement on communication methods, systems and terminology. Organizations and consultants have their own norms about how they communicate and about the terms, concepts and language they use. The client and consultant should determine how that communication happens, who is communicating with whom and when, and how to be attentive to ensuring that they understand each other.

A few topics to discuss around communications include:

- The best means of communications and how quickly to expect a response (Are you more responsive to emails or phone calls? Will emails be responded to within a day? Two days?)
- How frequently communications are expected to happen and on what topics (i.e. monthly phone check-ins on major deliverables with weekly email updates)
- Terms, concepts and language that are used by either the organization or the consultant that might not be familiar to the other. One way to address any gaps in language/lingo is to create a "glossary of terms" or "style sheet" to help the consultant translate their work into the client's language.

#8: A commitment to value and uphold #1-7, irrespective of how the engagement is being paid for and by whom. For example, when a consultant is working pro bono or at reduced cost, both the consultant and client should expect the same high level of timeliness and engagement from each other as in a full cost engagement. Also, when a consultant is recommended or provided by a foundation or other source, the client should still be able and comfortable to inform the design of the engagement to meet their needs and revise or cancel the engagement if necessary.

Identify any potential power dynamics related to the cost of the engagement or how it is paid for, and avoid any unspoken assumptions on either side about expectations for the work or the ability to change or cancel the engagement if needed.