

# Cardiff Third Sector Council

Your local county voluntary council



## 2. Running your organisation

### 2.14 Using freelance trainers and consultants

#### Introduction

The purpose of this information sheet is to help voluntary organisations and community groups use freelance trainers and consultants.

#### When do you need outside help?

Many voluntary sector organisations bring in the specialist expertise of outside trainers and consultants for anything from improving the quality of their services or the effectiveness of their management committee to fundraising and developing new projects. Sometimes you may not know what you want but would like an objective outsider to help you work out where you are going. If you do not have the time or the skills internally it might be time to engage some external assistance. Always consult your county voluntary council because they may be able to put you in touch with sources of free assistance.

#### Preparing to work with trainers and consultants

Discuss the training or consultancy with colleagues in your organisation to reach agreement on what you need and how people will be involved. Decide how you are going to go ahead:

- who will write the brief?
- do you need a subgroup for this piece of consultancy work?
- who will be responsible for the work and for monitoring and reporting progress?
- how will you pay for it?

Prepare a *brief* on what you want done and how – see below:

#### Training – the brief should include:

- the training aim, objectives and learning outcomes you wish to meet and the style and approach relevant to the course participants;
- information on any written materials you want produced by the trainer eg. training notes;
- the fee – either as a range or an upper limit and the expected date(s) and venue(s) and the estimated number of courses participants;
- reference to copyright (who owns it?) and future use of materials.

## Consultancy - the brief should include:

- relevant background details on the organisation and its objectives;
- the issue to be worked on and the expected outcomes of the consultancy – including any written materials you want produced eg. a consultancy report; any details on the approach to be taken eg. will there be a steering group, what consultation is involved?
- the fee, either as a range or an upper limit; the expected timescales and location of the consultancy;
- a person specification of the person required for the job, identifying relevant skills, abilities, experience, qualifications, etc.

## Danger areas

Think carefully about the brief because it is extremely easy to ask for the wrong job to be done by defining it badly or with not enough detail. You need to outline exactly what is needed. If you give vague or unclear instructions to the trainer or consultant, you will not be able to monitor their work. Your real needs may be difficult to pin down; if in doubt raise this with the consultant or trainer at the *discussion stage*.

## Selecting trainers and consultants:

Follow the guidance below to help you find the person who meets your needs. Where do you find consultants and trainers? Your organisation may already have its own contacts. You can access a database of trainers and consultants who have met a number of basic minimum criteria via the WCVA website. *WCVA does not give any guarantee or recommendation for any individual or organisation listed, and does not accept responsibility for the work they may do for your organisation.* It is important that you follow a number of key stages when selecting the right person for the job. Once you have your list of trainers or consultants, contact those who meet your criteria to see if they are interested in the work and available according to your timescale. Send the brief to those who are still on the list with a closing date for responses.

Ask them for the following details in their response:

### Trainers:

- their experience with similar organisations and training courses
- their rate per day and total fee
- their methods, approach and style
- the names of two or three referees who can provide feedback on their training

### Consultants:

- their experience with similar organisations and/or subject area
- the *unique selling points* of their work

- their rate per day, number of days work expected and total fee
- their methods, approach and style
- the names of two to three referees who can provide feedback on their work
- where they will work

## **Shortlisting and selection**

Shortlist trainers and consultants against the person specification and brief.

Selection may involve a formal interview or an informal discussion and may be conducted face to face or over the telephone. When using a consultancy firm speak to the person who will actually be carrying out the work or will be the main contact. The discussion should cover the following:

- who will be involved in the work
- clarify any points regarding the bid; provide an opportunity for them to ask about the work
- the fee and how it will be paid (eg. on completion of stages of the work)
- timescales

After the discussion compare strengths and weaknesses, timescales, their understanding of your work, sympathy with your core values and fees.

## **References**

Always ask for references before confirming a contract. Ask referees specific questions about the work you want done as well as about general issues such as range of experience, reliability, effectiveness and approach etc. For complex or substantial pieces of work you should include a copy of the brief with the reference request. A model reference request form is attached. You can include additional questions relevant to the nature of the particular training or consultancy.

## **Fees**

Always have fees quoted as daily rates so that you can make comparisons and find out exactly what the fee includes. For instance, does it include travel and accommodation? Is VAT included?

Be prepared to negotiate for a reduction. Don't be surprised at what appear to be high daily rates – most trainers and consultants who work in the voluntary sector charge at least £200 to £400 per day.

## **Funding**

If you need to raise money to pay for the training or consultancy, you may need further help. You can either contact your CVC or WCVA for information on funding sources. Since training and consultancy are two important parts of developing voluntary organisations, it is recommended that you plan ahead and include a sum for training (and possibly consultancy) in all your main grant applications.

## **Contracts**

Always establish a clear written contract with the trainer or consultant. You may need to ask for help with more complex contracts (for issues such as intellectual property). But in its simplest form, the contract can be a letter to the trainer or consultant which states:

- A summary of the work to be carried out, objectives and key milestones against timescales.
- For training – the dates, times and venues: for consultancy – the start and finish dates.
- The contract price and what is included.
- Your organisation's inputs. For training you will need to specify who will arrange the venue and photocopying etc? For a consultancy specify what information your organisation will provide, etc?

## **Managing the consultancy**

Once the trainer or consultant has been selected, refine the brief with them, agree any adjustments and the final brief. Monitor the programme against the objectives, milestones and outputs.

## **Evaluation**

Make sure that all training is evaluated and the information acted on. For consultancies, a simple system should be established to enable you to compare objectives in the brief with the outcomes of the consultancy. Use simple checklists and/or a discussion or debriefing session to establish:

- did the trainer or consultant do all the things which you asked them to do?
- did they do what was actually needed?
- did your organisation do what you agreed/needed to do to make the training or consultancy work?
- was the timetable effective?
- how would you arrange things differently next time?

## Implementation

The toughest part may be putting into practice the lessons and planning produced by your training or consultancy. A business plan can be useless without detailed information about how it can be achieved. You should always ensure that the consultant gives you guidance on the issue of implementation (i.e. taking action) and monitoring (checking on your progress).

## Further information

WCVA

Tel: 0300 111 0124

[help@wcva.org.uk](mailto:help@wcva.org.uk)

[www.wcva.org.uk](http://www.wcva.org.uk)

## Disclaimer

The information provided in this sheet is intended for guidance only. It is not a substitute for professional advice and we cannot accept any responsibility for loss occasioned as a result of any person acting or refraining from acting upon it.

### For further information contact

**Cardiff Third Sector Council**

*Baltic House, Mount Stuart Square, Cardiff, CF10 5FH*

**Registered Charity:** 1068623

**Tel:** 029 2048 5722

[enquiries@c3sc.org.uk](mailto:enquiries@c3sc.org.uk)

**Fax:** 029 2046 4196

[www.c3sc.org.uk](http://www.c3sc.org.uk)

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