



Live-Wires

Information Sheet No 3

Using or Being a Consultant, Mentor or Coach

One of the most helpful developments of recent times is the use of an outside person or group who can work with you to help you gain an understanding of what is going on in your work. Many groups will invite a person in to do a review of where they are. Even more individuals use what is called a work consultant. This is different from a spiritual director. The focus of consultancy is on a person or group in relation to the work they are doing and the tasks they are expected to achieve. Many groups or teams think it essential that they have an outside consultant if they are to be effective, professional and accountable.

A helpful definition of consultancy has been given by the Rev Dr George Lovell. Through many years he has developed sophisticated methods of analysing work situations. With Catherine Widdicombe he founded the training and consultancy agency *AVEC*. He has put together much of his consultancy experience in a comprehensive book ***Consultancy, ministry and mission*** (i). His definition of consultancy work is this:

Consultancy is a process of seeking, giving and receiving help aimed at aiding a person, group, church or organization to achieve their purposes in specific situations and circumstances. Analyses and designs are produced through the creative interplay between consultants and consultees as they focus on their work, the what and why and how of what they want to achieve in the circumstances in which they operate. (p23)

A description of the *purpose* of consultancy could be:

To offer the client focussed conversations about their work with the aim of increasing their capacity for reflection and action.

Some definitions

Consultant: someone or group completely independent of you or your organisation who is asked to come in and listen review and analyse your work or your organisation and make suggestions of recommendations.

Work consultancy: a process of thinking through issues with a trained consultant as they relate specifically to you and your work/ministry.

Work consultant: a trained and experienced person who helps you to analyse, understand and develop the work which you have been asked to do.

Organisational consultant: a trained and experienced person or group who are asked to analyse and make recommendations about your organisation.

Mentor: someone with an understanding of your area of work or specialism who, through their knowledge, experience, expertise and enthusiasm can accompany you through a task to an agreed series of outcomes.

Coach: someone who can keep boundaries, set objectives and who can work with you to progress a task, understand a situation or achieve outcomes.

Some of these titles seem to be interchangeable in a rather loose way. That is why it is essential to know what you want when any one of these people or groups is hired. If there is a lack of clarity then you may feel deeply disappointed and the person asked to do the work let down and frustrated. An enormous amount of time can be wasted and, on occasions, money not spent well.

Basic approaches

Trained consultants and mentors will have approaches which come from the way in which their own development has occurred. It will be important to explore these in an initial meeting. Some will have a pragmatic and practical approach drawn from years of experience in a particular area of work. Others will have as a part of their professional approach skills which may include training in organisational or group analysis, psychological profile skills or some other specialised form of analysis. Whatever the background of a consultant they will be bringing ideas and assumptions to bear on your situation and their analysis of it. You will be helped enormously if you can get those you are considering for your work to explain the approach which they will be using. Some excellent people with great qualities and skills will fit what you are looking for while other approaches may not. You may also want to ask if you can approach others they have worked with to gain some feed-back about their work.

Hiring a consultant

This section is designed to give advice for those individuals or teams who are considering hiring a consultant, coach or mentor. (These follow some of the guidelines offered by the Institute of Directors. See note iii)

What is the end result you are looking for?

- Is the output you are looking for describable and a development of what you have now?
- Are you asking to be guided towards developing a set of new ideas?
- Who will ensure the delivery of the end result – the consultant or your own team?

Be clear about *why* you need external advice and support to achieve your objectives.

- Consider which tasks are better done in house, and which are best done by a consultant
- Consider the alternatives
- Do not expect a consultant to solve your internal problems *for* you. Expect them to work *with* you on them.

Qualities to look for

- **Integrity** – if you feel that you cannot trust a person for any reason, not least confidentiality, then they are not to be used.
- **Reliability** – however good they are and have the skills you are looking for if they cannot deliver what they promise then they cannot support you.
- **Credibility** – will what a consultant says give enough authority in the person and in the way they work to persuade you, and others, to listen to their views?
- **Technical expertise** – how is ability to do the job conveyed? If it is so jargon-filled that you cannot understand what will happen be suspicious.

Basic questions

- Will they be doing the work themselves or will it be a colleague?
- What are the charges and what do they include?
- When do the charges begin?
- Where has work been done before and can other clients be approached for a reference?
- How much time are you contracting for?
- If you are agreeing individual consultations, how frequently will they be, how long will they last and are they for a fixed length of time?
- If the commitment is ongoing, how and when will it be reviewed?
- What will happen to any written documentation?

Briefing a consultant

- 1) Summarise the situation to be improved or the problem to be solved.
- 2) List your objectives. Describe the place the consultant could have in achieving them. Remember that consultants are willing to give advice which will put them out of a job.

Criteria for success

The acronym SMART is an easy way to examine if consultancy is what you want. (ii)

Is the work:

Specific

Measurable

Achievement focused

Realistic
Time bounded

Questions to ask yourself

Before you, your team, your church council or whoever approaches a consultant, ask yourself these questions:

- 1) What is the objective and has it been agreed by the appropriate group?
- 2) When does the work need to be completed by?
- 3) What do you expect the work or the consultancy to 'look like' when it is finished?
- 4) How will you know if the work has been successful?
- 5) What could go wrong?
- 6) Are any payments going to be made?
- 7) Are written reports and reviews expected?
- 8) How do you want to feel when the work is completed?

Making the agreement

Get the consultant to submit a proposal based on the outline brief. With some clarification you can work out a detailed agreement. This will avoid ambiguities and misunderstandings.

- i. Define what you understand by project completion. Does this include your team meeting certain targets?
- ii. Specify who is responsible for achieving what.
- iii. Set out either an outline or a detailed project schedule, depending on the work which you are asking to be done. Milestones are vital and keep the work moving towards its final targets.
- iv. Agree the fees and when they will be paid. (There can be a fixed fee, a daily fee and even a success fee)
- v. Some agreements include a disputes procedure if you fall out with the person or company you hire.
- vi.

Guidelines for Consultants, Mentors or Coaches

Training

Training exists in many places for those who want to develop consultancy, mentoring or coaching skills. Many would say that no kind of consulting should be undertaken without some basic training and that a consultant should first be receiving consultancy themselves. One good place to gain more information about consultancy training and the professional networks which exist is from the Church of England's Board of Education Website www.cofe.anglican.org . The European Mentoring and Coaching Council (EMCC) have produced an important Ethical Code. See end note (iv)

Essential guidelines:

- Make a clear agreement before you begin
- Build relationships at every contact level
- Review and revise the agreement if any part of the situation changes
- Identify lack of client commitment and act quickly
- Keep reminding the client if an end has been agreed and that this gives a time deadline for everyone to complete work.
- Continue with your own inservice training and review

The EMCC Ethical Code states competences and expectations in an extremely professional way:

The primary responsibility of the coach, mentor or consultant is to provide the best possible service to the client and to act in such a way as to cause no harm to the client or sponsor.

The coach, mentor or consultant is committed to functioning from a position of dignity, autonomy and personal responsibility.

Competence

The coach, mentor or consultant will:

- i. Ensure that their level of experience and knowledge is sufficient to meet the needs of the client.
- ii. Ensure that their capability is sufficient to enable them to operate according to their professional code of ethics and any standards that their organisation or network requires.
- iii. Continue with relevant training and professional development.
- iv. Maintain a relationship with a suitably qualified professional supervisor.

Context

The coach, mentor or consultant will:

- i. Ensure that the professional relationship reflects the context in which the work is taking place.
- ii. Ensure that they themselves understand how it is agreed that the expectations of the client will be met.
- iii. Seek to create an environment in which all concerned are focussed on creating an environment in which learning can take place.

Boundary management

The coach, mentor or consultant will:

- i. At all times operate within the limits of their own competence and recognise that where that competence is likely to be exceeded, that they will seek advice or refer the client to another professional.
- ii. Be aware of the potential conflicts of interest which can emerge either of a commercial, or personal nature and seek to deal with these in an appropriate and professional way.

Integrity

The coach, mentor or consultant will:

- i. Maintain throughout a level of confidentiality which is agreed and appropriate to the work.
- ii. Disclose information only when specifically agreed with the client.
- iii. Act within the law and not collude with anything which is dishonest, unlawful, unprofessional or discriminatory.
- iv. Demonstrate respect for the variety of different approaches there are to this work and not denigrate the approach and training of colleagues.
- v. Never represent the work and views of others as their own.
- vi. Ensure that any claim to professional competence is explained and that no false or misleading claims as to training or professional qualifications are made.

Working with the churches

There is a growing view that if a consultant, coach or mentor is coming from an 'outside' situation to work with a Christian group, there is some advantage in being equipped with a broad understanding of the context of the church group with which they are working.

It might be helpful to:

- 1) Gain an understanding of the history and values of the particular denomination.**
- 2) Find out something about the national and international issues facing that denomination.**
- 3) Seek an objective, external, briefing about the parish, congregation, diocese, district etc. before the first formal meeting.**
- 4) Visit the area to get an understanding of the context.**
- 5) Look at any national or local websites for the congregation and its denomination.**
- 6) Be familiar with how to access information about legislation affecting a denomination or congregation.**
- 7) Gain an understanding about where the person or group fits into the structure of a denomination.**
- 8) Explore the person or group's previous experience, or lack of it, when using a consultant.**

Malcolm Grundy, the Director of FCL says; one final comment which I always make to myself and frequently joke about to clients is, 'Remember they always have another meeting after you have gone!'

Notes

(i) *Consultancy, ministry and mission, a handbook for practitioners and work consultants in Christian organizations*, George Lovell, Burns & Oates, 2000, ISBN 0-86012-312-X

(ii) Taken from *Consultant, be your best and beyond*. Anna Hipkiss, 2003, Q Learning, Hodder & Stoughton. ISBN 0-340-85623-8

(ii) Institute of Director's Briefing: Human Resources Management: Using a Consultant, www.iod.com

(iv) European Mentoring and Coaching Council, Sherwood House, 7 Oxhey Road, Watford, Herts WD19 4QF. www.emccouncil.org

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www.live-wires.org