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Effective Consulting Partnerships to Philanthropy

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Introduction

The problems our society faces today are too great in number, depth, and complexity for any one organization to tackle alone. As a result, foundations, nonprofits, public agencies, and private entities are increasingly working together (Abramson, Soskis, & Toepler, 2014; Balderston, 2012; Brest, 2012; Gibson & Mackinnon, 2009; Hopkins, 2005; Hughes, 2005; Kasper & Marcoux, 2014; Natsios, 2009; Snibbe, 2007; Weed, 2013). These partnerships can take on many shapes and forms, including public-private partnerships, pooled and co-funding efforts, consortia, coalitions, associations, scaling initiatives, and nonprofit collaborations.

In our 16 years as strategic consultants to philanthropy, we – along with many other consultants – draw on a variety of tools to help our clients learn, improve, and enhance their impact. One such tool is partnerships. When done well, partnerships among consultants to support funders in grantmaking, strategy development, evaluation, grantee engagement, and other components of their work can maximize collective capacity and capitalize on complementary skills and expertise.

While there is a growing knowledge base about funder and nonprofit partnerships and increasing foundation interest in leveraging partnerships, there is very little documented on partnerships among consultants who are supporting philanthropy – what we are calling philanthropy-

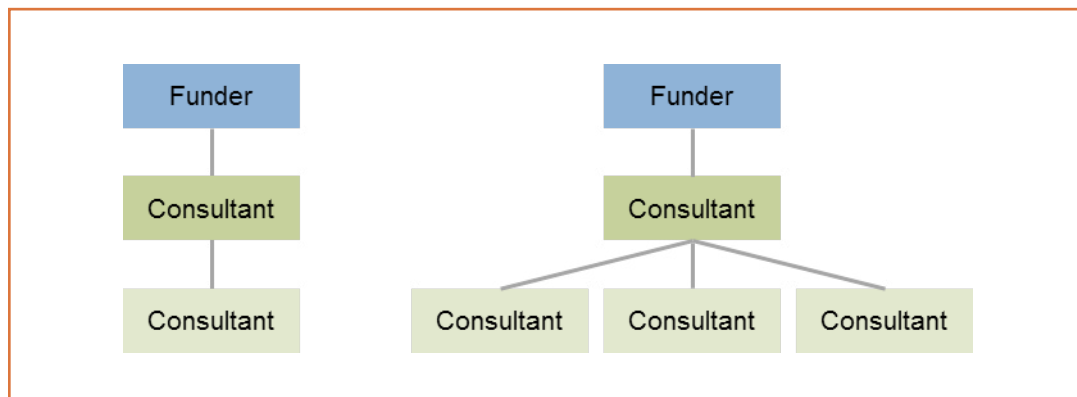
Key Points

- This article explores the realm of partnerships among consultants who are supporting philanthropy, surfaces the forms those philanthropy-consulting partnerships take, and describes their benefits and inherent challenges. It also describes what foundations most need to know about initiating and supporting philanthropy-consulting partnerships.
- Types of consulting partnerships are a function of the needs they address and the contexts in which they were initiated. A useful way of looking at consulting partnerships is according to their structure – whether the relationship with the client is primarily horizontal or vertical in nature. In a vertical structure, a client hires a consultant, who in turn subcontracts to one or more other consultants. Horizontal consulting partnerships occur when two or more consultants partner on a client project.
- Through the sharing of both good and difficult experiences with these partnerships, foundations will be better equipped to consider how they can or cannot help them further their mission-related work.

consulting partnerships. This is precisely what prompted us to write about this issue.

This article explores the realm of philanthropy-consulting partnerships, surfaces the forms they take, and describes their benefits and inherent challenges. Some of these features

FIGURE 1 Vertical Consulting Partnerships



are unique to partnerships particularly in the field of philanthropy, while others apply to consulting partnerships more broadly but are also important in philanthropy. We also describe what foundations most need to know about initiating and supporting philanthropy-consulting partnerships.

This article is informed by our extensive experience in philanthropic and nonprofit consulting, including participating in and observing an array of philanthropy-consulting partnerships. We also draw from the wisdom and experience of nine other consultants, former consultants, and philanthropic professionals, and their experience with dozens of these partnerships.

Our intention is that through the sharing of both good and difficult experiences with philanthropy-consulting partnerships, foundations will be better equipped to consider how consulting partnerships can or cannot help them further their mission-related work.

Types of Consulting Partnerships

Types of consulting partnerships are a function of the needs they address and the contexts in which they were initiated. A useful way of looking at consulting partnerships is according to their structure – whether the relationship with the client is primarily horizontal or vertical in nature. There are, of course, many variations of these primary forms, with some shades of grey.

Vertical Consulting Partnerships

In a vertical structure, a client hires a consultant, who in turn subcontracts to one or more other consultants. (See Figure 1.) This type of partnership is more frequently used when providing specific, targeted, time-bound support to a lead consultant or the project. Different from a pure vendor relationship, where a specific product is delivered for a fee, these partnerships have elements of collaboration. The funder – the client – has a primary relationship with the lead consultant and little or no interaction with the subcontractor.

One example of this type of partnership is outsourcing for a particular skill set that is beyond the core competency of the lead consultant, such as graphic design, meeting facilitation, communications, or videography. This skill set is needed to complete the assignment and requires a collaborative working relationship, but work can be effectively overseen and integrated into the project by the lead consultant.

Vertical partnerships can be used to make work more affordable when a particular task can be performed at a lower cost by another consultant. For example, if a funder is looking to convene a community of practice among a group of grantees, a higher-cost, experienced facilitator who designs and leads the learning sessions may work with a lower-cost event coordinator to handle scheduling and meeting logistics. The lead consultant can manage the event coordinator's

work without the client needing substantial involvement – hence the vertical relationship.

Implication for philanthropy: Funders are advised to clarify for their consultants whether subcontracting with others for any part of the work is permissible and for what purposes. This ensures that the funder knows who is performing the work, which helps ensure quality and any necessary precautions such as protecting confidential information about the funder, grantees, or service recipients.

Sometimes these partnerships are used to increase a consultant's capacity to meet a deadline or expand the ability to manage multiple client projects at one time. A research firm, for example, may partner with an independent consultant to conduct and analyze a group of interviews as part of a larger study to enable a large amount of data collection in a short period of time.

Example: We recently evaluated a long-term, large-scale initiative focused on improving patient safety in acute-care hospitals. While we have extensive health care experience and knowledge, we realized that this project would benefit from specialized knowledge from experts in each of the initiative's key content areas: hospital quality-improvement efforts, the nursing workforce, and transitional care. We solicited input from Knowledge Advisors at specific points during the consultancy – including the evaluation design and reviewing data-collection tools and evaluation products – to ensure that our approach, processes, and products took into account the nuance and depth of these particular streams within the field.

Another example seen in philanthropy consulting is when expert advisors with deep content knowledge, technical expertise, or community perspective provide targeted guidance to the consulting project.¹ Consultants may enlist one or more expert advisors – either at their own initiation or at the request of the funder – at strategic points in an engagement to provide nuanced or contextualized understanding of an issue, rather than serving as part of a team for the duration of the project. For a consultant with limited experience working with philanthropy, for example, an advisor knowledgeable about

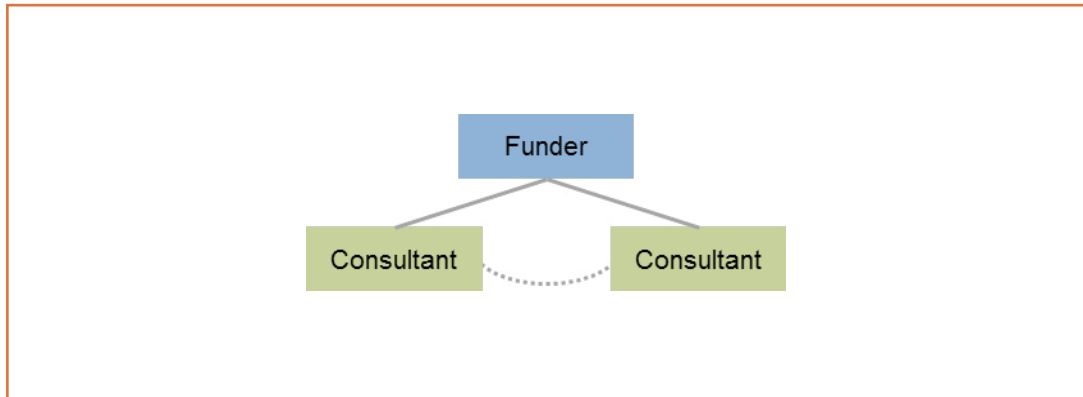
Consultants may enlist one or more expert advisors – either at their own initiation or at the request of the funder – at strategic points in an engagement to provide nuanced or contextualized understanding of an issue, rather than serving as part of a team for the duration of the project.

the funding environment can help bring the consultant up to speed on philanthropy and grantmaking and help focus the consultant's work on the client's needs. Advisors' contributions can augment the knowledge, perspective, and sensitivity of the lead consultant, thereby validating, deepening, and enhancing the quality of the work.

Expert advisors can help ensure that the voice and needs of diverse communities are appropriately understood and incorporated into a consultancy, such as in a community planning or visioning process. Targeted contributions from expert advisors in research and evaluation consultancies can guide lead consultants in asking the right questions during data collection and including appropriate context and nuance in analysis and writing. A project implemented in many local sites can also benefit from expert advisors who bring local knowledge, context, and culture.

¹ This is different from a funder-initiated advisory committee that provides guidance to a funder, which might include providing feedback around a consultant's work but may also extend beyond that. With funder-initiated advisory committees, the funder and advisors have a direct relationship, so we do not consider them to be consulting partnerships and do not address them here.

FIGURE 2 Horizontal Consulting Partnerships



Sometimes expert advisors connect consultants to other leading thinkers, which can add credibility or legitimacy to a project. By leveraging existing knowledge, expert advisors can sometimes create financial efficiencies by helping consultants dive into a project, reducing the need for consultants to quickly learn on their own about a topic.

Implications for philanthropy: Funders should be aware of a few common challenges when their consultants partner with advisors.

First, advisors who are thought leaders in their fields can be busy and costly. Consultants and foundations must consider the best use of their time, based on their expertise, availability and evolving project needs. Consultants who work with expert advisors occasionally lament that, despite best intentions, scheduling limitations have resulted in advisors not being available when needed. Unlike grantees, who may be willing to “drop everything” to meet a funder request, funders and consultants may have to work around experts’ schedules.

Second, advisors who represent various community perspectives may have a particular stance about what is needed. While this perspective is exactly why their advice is being sought, it is also important for advisors to understand their role, which in this situation is to guide and provide input but not to make decisions.

Given these issues, proactive planning and clear communication about the time commitment and expectations – specifically around the type and level of advisor input – is crucial.

To maximize the benefit of an expert advisor partnership and to keep it financially beneficial, the lead consultant and the advisor must find an appropriate level of involvement in the project such that the advisor can provide relevant guidance without becoming involved beyond the scope of the agreement.

Horizontal Consulting Partnerships

Horizontal consulting partnerships occur when two or more consultants partner on a client project.² (See Figure 2.) Both consultants have a direct relationship with the funder and have substantial involvement in the project. A foundation may contract separately with each partner or with one consultant who then subcontracts to the other. What distinguishes the latter arrangement from a vertical partnership, however, is that both consultants have a clear and important relationship with the client.

Horizontal consulting partnerships can vary in structure and substance:

- *Who leads?* Leadership in horizontal consulting partnerships falls along a spectrum from one lead consultant with another in a secondary role to co-leadership. Leadership can also shift back and forth between the consultants over the course of a project as the work enters different

² For brevity, we talk about these relationships in this article as involving two consultants or consulting firms, but they may involve multiple firms, multiple independent consultants, or some combination thereof.

phases that require more from one or the other. The ratio of work between the two can vary from an even split to more or less with each consultant. The question of who leads carries logistical, legal, and practical implications that are addressed in individual engagements.

- *Who originates?* Collaborative consultancies can be initiated by consultants themselves when they see the benefit of working together, or they can be initiated at the request of a foundation. Also, not all partnerships are deliberate. Foundations sometimes hire two consultants for separate projects and, later, either the funder or the consultants realize that because there is a connection or even some overlap between the pieces of work, a partnership – or at least ongoing coordination – is needed to do the work well.

There are many reasons for these variations in origin. For example, a foundation working with a website consultant may see the need to coordinate with a consultant on grant applications and reporting, since these tools are integrated into the website. Sometimes foundations initiate partnerships because they are attracted to components of proposals from two different consultants – one brings an element of desired credibility, while the other has greater capacity or particular content expertise. A foundation may also have experience working with each firm individually and believe that each one has something unique to offer in a consultancy.

A Note On Foundation-Initiated Consulting Partnerships: While there are many good reasons why foundations ask consultants to partner with one another, some consultants believe that where a partnership is warranted, the consultants themselves should determine the partners. Difficult or ineffective working relationships can compromise the process and product. The consultants themselves are in the best position to understand whether their processes and approach are complementary – and it may not be appropriate to discuss some of these issues with the potential client – and thus assess the viability of a particular partnership.

When done well, consulting partnerships can provide foundations with better services, guidance, and products by augmenting expertise and capacity, deepening the legitimacy of work and improving affordability.

“It is one thing for a firm to tell a funder, ‘We have the expertise but we want to bring someone in to round it out,’ and another thing entirely for a funder to come to a consulting firm and say, ‘We want to hire you, but not just you.’” – Consultant

Benefits of Consulting Partnerships

Not all philanthropy-consulting partnerships are successful, and they are by no means always necessary. When done well, however, consulting partnerships can provide foundations with better services, guidance, and products by augmenting expertise and capacity, deepening the legitimacy of work and improving affordability. As one consultant remarked:

There’s a type of strategic alliance between consultants when they proactively reach out to each other and decide to do something bigger than either one of them can do on their own. They say, “I need to augment. I have a project that I can’t do on my own. I don’t have the bandwidth or the specific expertise and I want to tap into your expertise in a partnership.” In one I’m doing now, we weren’t credible alone and weren’t going to provide the best service to the client alone, so we entered into a complementary partnership.

Consulting partnerships in philanthropy can provide benefits to three stakeholder groups.

At their best, consulting partnerships compound the individual value of each consultant to the funders. ... the very nature of consulting partnerships – providing multiple minds and perspectives – uniquely positions the consultants as strategic resources and thought partners to foundations that can enhance learning and effectiveness.

Consultant Benefits

It is not uncommon for consultants to proactively reach out to one another to compose a more competitive bid. Consultants also report deep satisfaction from partnerships that are based on trust and shared values. These partnerships can provide effective opportunities for shared learning, ultimately making both more effective consultants. As one consultant observed, “The collaborative process makes the work better. Different parties bring different knowledge bases, and I find that really rich for the work and on a personal level.”

Foundation Benefits

The integrated skills, expertise, knowledge, and perspectives offered in consulting partnerships can provide funders with higher-quality, more nuanced and perceptive processes and products than they could “buy” from a single consultant. A foundation can benefit from the best and brightest thinking in a border-crossing consulting partnership. Said one consultant,

I think foundations should be able to construct work teams, talent, processes, and methodologies

that are custom-fit to their needs and not based on anachronistic boundaries of how talent is tilled or shared. I would hope that nonprofits, funders, and consultants would see more freedom in the approach of open border and knowledge sharing.

At their best, consulting partnerships compound the individual value of each consultant to the funders. Particularly in horizontal consulting partnerships, the consultant team can serve as thought partners to their clients. This is not always the case, though; sometimes funders relate to consultants more as grantees. However, the very nature of consulting partnerships – providing multiple minds and perspectives – uniquely positions the consultants as strategic resources and thought partners to foundations that can enhance learning and effectiveness.

Field-Level Benefits

When done well, consulting partnerships are an opportunity for philanthropy to strengthen consultants’ field-level contributions. By their very nature, consulting partnerships facilitate connections and bring people together. They can also create knowledge and better practices that go beyond a single foundation and can help to enhance impact in the philanthropic sector and various nonprofit fields (e.g., arts, health, education). Multiple minds that cross experience, communities, age, gender, race and/or ethnicity, and other factors can spur insights with broad application and the potential to bring about important change.

Potential Challenges in Consulting Partnerships

In addition to the benefits of consulting partnerships, there are some unique challenges that consultants and foundations should be aware of as they consider and engage in these partnerships. A few of these challenges are specific to the practice of philanthropy itself, while many others relate to consulting partnerships for any type of client, including philanthropy. These types of challenges are often heightened in horizontal-partnership structures, where both consultants are in active relationships with the client. As with any consultancy, there ought to be very good reasons

to form a partnership – reasons that outweigh the potential challenges.

The Funder/Grantee Relationship

The nature of grantmaking creates a particular power dynamic between funders and their grantees. Consultants supporting philanthropy add another dimension, and multiple consultants put another wrinkle in the fabric of these relationships.

Grantees may see consultants as an arm of the funder, or even confuse the consultant with the funder. At times this is appropriate – when the funder has given the consultant team the authority to speak on its behalf. But it must not be assumed that each consultant in the partnership has this same level of authority. Consultants may also have preexisting relationships with particular grantees, or they may have more experience working with funders or with nonprofits. A funder should not assume that each consultant has the same experience, relationships, and allegiances. Existing relationships can affect how consultants operate with grantees, whether explicitly or implicitly.

In addition, the nature of the consultancy may put the team more clearly working on behalf of the funder (e.g., supporting the grantmaking process) or as an intermediary between funders and their grantees (e.g., convening a learning community). In either case, though, the consultants are ultimately accountable to their client: the funder.

In all of these situations, the key is to clearly articulate roles and relationships across all parties. It is important not to assume that the consultant team is one and the same entity. The consultants enter the consultancy from different vantage points and they may also have distinct roles. It is important to take into account the nature of the funder/grantee relationship and to reflect the foundation's intentions.

The Field-Level View of Philanthropy

One of the unique opportunities afforded to philanthropy is an expansive, field-level view of complex social issues. Therefore, funders sometimes initiate horizontal consulting

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partnerships because they see each partner as providing a particular understanding of that broad landscape. Together, the partnership helps the funder piece together a picture that cannot be seen from any one vantage point. It is important for each consultant in this type of partnership, therefore, to understand how the funder sees their role and how it complements the perspectives of others, so that they can better deliver on their unique contribution to the work.

Differing Styles and Structures

Consulting teams may differ, for example, on how often and through which medium to communicate with the client, the formality of reporting, product design, and more. These types of differences are more important in horizontal than in vertical consulting structures, where both consultants have a direct relationship with the client.

To navigate these differences, consulting partnerships require additional time for project coordination across two or more entities, a greater level of communication over the course of the project, and more attention to involving and supporting each other (e.g., internal planning meetings, multiple consultants on client calls). While foundations have every right to expect high-quality work at a price commensurate with its value, an expectation of minimal

administrative process may not be feasible in these situations. So while vertical consulting partnerships may be considered for their potential cost efficiencies, in horizontal partnerships there is likely an additional cost associated with the added benefit of the multiple perspectives precisely because they require more time. A push for faster and cheaper processes can stymie successful collaborations.

Promoting Effective Consulting Partnerships

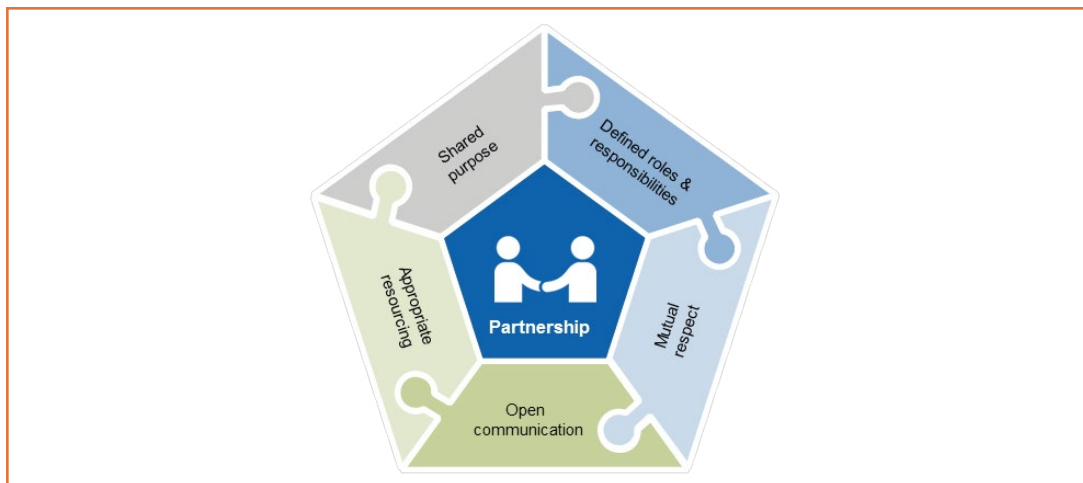
Key Ingredients of Success

“Happy families are all alike; every unhappy family is unhappy in its own way.” – Leo Tolstoy, Anna Karenina

There is no blueprint for effective philanthropy-consulting partnerships. Despite their variation, effective partnerships share some basic qualities, some of which are unique to working with philanthropy and others which are qualities for any successful collaboration. (See Figure 3.) Following these good practices will not necessarily make partnerships easy, but doing so can set the stage for healthy partnerships and provide foundations and consultants with ways to surface and address the accompanying challenges.

- **Shared purpose:** Just as every consultancy has a purpose – whether developing a grantmaking strategy, reorganizing a foundation’s operational model, planning staff/board retreats, or creating a communications campaign – a consulting partnership must have a clear purpose. All players need to understand why the work is best suited to collaboration: where the content expertise lies, what skills are needed, and how they dovetail.
- **Defined roles and responsibilities:** With multiple consultants involved, it can be easy to have too many cooks in the kitchen. Considering the importance of efficiently utilizing client resources, stakeholders must clarify who does what and, with regard to decision-making, who has the final say. What is the responsibility of one or the other consultant, and what is strictly the funder’s purview? And who decides these roles? Answers to these questions need to be clarified for the consultants, the funder or client, and any grantees or others interacting with the consultants.
- **Mutual respect:** Partnerships are most successful when each party respects the knowledge and expertise of the other, is open to feedback, and demonstrates flexibility when needed. A recent article about donor-grantee partnerships noted,

FIGURE 3 Puzzle Pieces of Successful Philanthropy-consulting Partnerships



“We are convinced that the best way to navigate these partnerships and deliver maximum impact is to anchor the relationship in empathy” (Stumpf & Rogers, 2014). We believe this claim is true for consulting partnerships as well.

- *Open communication:* Channels for timely, consistent, useful, and comfortable communication provide the structure needed to address the challenges that will inherently arise in any philanthropy-consulting partnership. Also, transparent communication is critical for surfacing and navigating the relationships and dynamics with and between funders and grantees.
- *Appropriate resourcing:* More than other consultancies, horizontal consulting partnerships require ongoing communication and coordination. If partners have not worked together before, they may have a steep learning curve. Time, as the unit of income in the business model of consultants, comes at a cost. A consulting partnership should provide greater value than if there was not a partnership. Appropriate resources and time should be dedicated to forming a healthy, effective consulting partnership.

The Role of Consultants

There are a number of things consultants can do to set themselves up for success, before and throughout the duration of the partnership. Prior to beginning work, consultants must answer these questions:

1. Is a consulting partnership appropriate for the task?
2. Are the potential partners the right choice for the needs of this engagement?
3. Will the partners be able to work together effectively?

To answer these questions, consultants must understand the client’s needs and assess the following core components of “fit.”

A recent article about donor-grantee partnerships noted, “We are convinced that the best way to navigate these partnerships and deliver maximum impact is to anchor the relationship in empathy.”

- *Mutual need:* Interdependence, such that consultants need each other to accomplish the task, and a belief that the work will be enhanced by collaboration.
- *Shared vision:* A common understanding of how best to approach the work (e.g., whether to be more or less directive with the client, what constitutes high-quality work).
- *Culture and values:* Clearly articulated shared values, especially on the philosophy and business of consulting. In other words, do consultants speak the same language? Check for complementary skills, style, and approach and a mutual respect for each other’s work.
- *Skin in the game:* General willingness to negotiate and accommodate, including confirming that both parties can allocate sufficient time for logistics to accomplish the goal. This also includes an explicit commitment to transparency and information sharing. As one consultant observed,

Issues like how to divide fees, coordinate and ensure quality work are not the problem. They do pop up and you have to deal with them, but the real problems are when you don’t have value alignment. If you are truly interested in collaboration and mutual learning, I don’t think it is harder or more time consuming to [work] with another consultant than it is on your own.

Foundations are – and should be – primarily concerned with the quality of a consultant’s work and its utility to the foundation rather than the quality of a consulting partnership.

In addition to considering the key ingredients for successful partnerships, consultants have the following responsibilities to set projects up for success:

- *Define structure and management.* Build a process to determine who makes decisions and when. Develop contingency plans that help partners manage shifting project scopes and timelines. Especially when there is some duplication of skills and expertise between partners, it is important to clarify who does what and for partners to lead in their areas of strength. It may be helpful to document these agreements in writing.
- *Acknowledge relationships and dynamics.* Take time to discuss how past experiences and relationships inform how the different consultants approach the work or influence their perspectives about the funder, grantees, or other stakeholders. Is there experience primarily with one side of the funder/grantee relationships or both? Have they worked with the funder, grantees, or other stakeholders before? If so, how might that impact their participation in and contribution to the partnership?
- *Monitor, and adjust as needed.* Keep an eye out for signs of incompatibility, tension, competition, or conflict to ensure that consultants are on the same page.

The Role of Foundations

Foundations are – and should be – primarily

concerned with the quality of a consultant’s work and its utility to the foundation rather than the quality of a consulting partnership. However, given that the quality of the consulting partnership is a contributing factor to the quality of the work, there are a number of things that funders can do to bring value to the work and, potentially, the field through facilitating effective partnerships between consultants. Beyond considering the key ingredients for successful partnerships, foundations can:

- *Allocate appropriate resources.* Invest time and resources commensurate with the expected results of the consulting partnership, including the transactional coordination costs. In addition, clarify whether or not to invest in initial relationship-building between consultants to help them determine whether they wish to pursue a consultancy together. Alternatively, consider the opportunity cost of investing appropriately in a consulting partnership versus providing further resources directly to grantees.
- *Be flexible when possible.* Plan for some flexibility to accommodate changing project scopes and timelines, and ensure that any potential shifts in budget and timelines are acceptable to both consultant parties. Especially for complex projects, build in regular reflection time to review processes, refine work plans, and, if necessary, revise contracts.
- *Start small.* Anticipate the natural learning curve of working with consulting partnerships. To limit the risk of this first-time engagement, funders should aim to start with a contained project and embark on the work as an opportunity for ongoing learning and organizational development.

Conclusion

This article aims to provide a framework for thinking about and engaging in consulting partnerships in the field of philanthropy. Given that there is little documentation on the utility and effectiveness of these endeavors, we hope that this article sparks further conversation about philanthropy-consulting partnerships.

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