

Office of Community Action (OCA)

CAA Best Practices/ Lessons Learned from a Consultancy Experience

Recently, the National Executive Service Corps (NESC) completed consultant work with a Community Action Agency in New Jersey. This report summarizes some of the best practices and lessons learned from the experience.

Both the agency and NESC gained insights into the problems of working with small, less-well-funded agencies which have not had a formal marketing plan or personnel with a marketing background. The several problem areas, and their solutions, follow:

1. Be sure that there is a complete understanding of the end product needed and desired by the agency.

The difference in cultures between the consultant and client often leads to a misunderstanding as to the end product desired by the client. This is sometimes more difficult than apparent, since the agency individuals may not fully understand what is needed to achieve the ends sought. The initial meetings should stress the importance of obtaining, as specifically as possible, an agreement of what is desired by the client. There must be a clear definition of what will be the end product of the consultancy. If possible, the consultants should give an example of the end result to the client to avoid confusion.

2. Illustrate the end product -- in this case a market plan. The basic components of a market plan are:

A. Introduction

Why is the plan to be produced? Who is asking for it, and why?

B. Current Situation

Included here are such items as: Who and what the agency is. What it does. What are its strong and weak areas. What changes have taken place in the agency and the areas in which it operates. Whether the agency is meeting the requirements of the community.

C. Market Plan Objectives

What does the agency want to accomplish within the stated period of time (usually one year)? The objectives should be as specific as possible, and desired quantitative results should be shown.

D. Action Plans

What needs to be done to meet the objectives? This includes projects to be undertaken, staff to be hired to do the projects, where monies for the projects will come from, etc. Details should be given to show who will be responsible for each task, how long it will take, and how much it will cost.

E. Plan Review and Evaluation

Since we live in an ever-changing world, the plan should be subject to periodic review by the Board and client, not only to be sure that the projects are proceeding as planned, but to determine whether changes must be made in the plan to meet a changing situation.

3. Obtain agreement, at the outset, regarding the extent of the consultancy; specifically, who will develop the final product?

The key to a successful conclusion to a consultancy is an understanding, by both the client and consultant, of the ability of the client's personnel to develop the end product. In agencies where the personnel is not able (by training or time constraints) to develop the end product, the consultant must be able and willing to assist in "fleshing out" the plan or program, and even aid in at least starting its implementation. This realization early in the project can also help establish a realistic time frame.

4. Allow more time for the consultancy.

The need for enough time to complete the consultancy should be a primary consideration. A serious problem with these consultancies is that the agency has a multitude of internal projects and the issue being addressed by the consultancy cannot always have top priority. This results in a lack of agency staff available to work on the project and delays in completing its various stages. In addition, because the personnel available are not trained in the discipline needed for the project, more time is needed to either provide training or find other resources. This is not to cast aspersions on the client personnel. It is merely the observation that the background needed for successfully running a social service agency is not necessarily that needed, for example, to create a business, strategic or marketing plan. After the contract has been signed and in progress, provide for the consultant and the client to review the end point and to recommend a change or an extension to ensure that all the goals of the contract are completed.