



FOUNDATION FOR CHURCH LEADERSHIP

## Resource paper No 3

### Using a Consultant or Mentor

Malcolm Grundy

#### Work consultancy and mentoring

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*. I was privileged to follow him as Director for a few years. 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 consultors and consultants 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)*

## Some definitions

I have scoured books and training papers by other people and have found these 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 to consultancy

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.

## Basic 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 have enough authority in themselves 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 will be given or are you buying?
- If you are agreeing individual consultations, how frequently will they be, for how long will they last and is this to one year, or how long?
- If the commitment is ongoing, how and when will it be reviewed?
- What will happen to any written documentation?

## Criteria for success

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

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?
- 2) When does the work need to be completed by?
- 3) What do you expect it 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?

### Training for would-be consultants

Training exists in many places for those who want to develop consultancy 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](http://www.cofe.anglican.org)

### Essential hints for consultants

- 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

One final comment which I always make to myself and frequently joke about to clients, '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) *Consultant, be your best . . . and beyond*. Anna Hipkiss, 2003, Q Learning, Hodder & Stoughton. ISBN 0-340-85623-8



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**Contact: Canon Malcolm Grundy, 4 Portal Road,  
York YO26 6BQ. 01904 787387**

**[director@churchleadershipfoundation.org](mailto:director@churchleadershipfoundation.org)**

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