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# ONcall

ready-to-use NEWS

## Your primer to using PR consultants When, why and how, plus do's and don'ts

Ever wonder why folks “just don't understand and support us these days?” You're posting on social media, keeping your website current, sending emails, robocalls or using text messaging to reach parents — all the right stuff.

Or maybe you're facing a crisis — or just want to introduce your new superintendent and feel unsure about being effective in today's sadly familiar “fake news” environment.

A consultant can help — not only with great solutions, but in using those scarce “outside vendor” resources wisely, often in unexpected ways with benefits lasting far beyond the life of the contract.

### **A consultant is not a silver bullet — but they come to the rescue**

These experts offer deep levels of expertise in specific areas, or they can provide an overall view of what you should be doing to communicate and build support. They can deliver a short-term project like a focus group, help you ease the pain of closing a school, or transition your “brand” with a new logo and presence in social media.

### **When should you hire one?**

- If you already have a good PR plan and know what you need, contractors can fill in the gaps for things needing a professional touch, such as videos, writing features/speeches or web content.
- If you don't have a plan, and find yourself “needing a brochure” (red flag!) a good expert won't simply do what you ask — he or she will help you dig deeper to learn what need or problem you need to fix.
- A good consultant should also give “value-added” benefits such as new tools and ideas the staff can continue on their own.

### **When not to hire**

- If you already have a good two-way, systematic PR program in place, you've passed a recent finance measure, you have feedback tools suited to each audience and are proactive when issues emerge. However, consider just an audit, or an hour or two of a consultant's time to “brush up” your efforts with new ideas. Check the NSPRA website ([www.nspr.org](http://www.nspr.org)) for resources.

### **What is the MOST important thing a consultant can do for you?**

- Provide insight or tools you haven't thought of. They should recommend system improvements (even if they are doing a very small project), in a neutral and unbiased way.
- Consultants should leave behind tools/templates that make the project easily repeatable.

For subscription information, contact WSSDA at (800) 562-8927 or (360) 493-9231.

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### **How do they work?**

- Some contracts are long-term, or cyclic in nature. Most contracts are time-limited, should have a termination date and be very specific to an organizational need — preferably one based on research (or the need for it, since consultants are experts in that area.)
- Meet with a prospective consultant, or buy an hour of their time (or ask if they would do this pro bono) to discuss whether your needs fit into a short-time service, or something cyclical. A good contractor will be honest — and would welcome the opportunity to meet again!
- Most long-term large contracts (over \$10,000) are conducted through formal requests for proposals (RFPs) and are conducted through a formal bidding process. Work with your business staff on setting these up.

### **What do they cost?**

Consultants often charge up to three times above what their salaried peers make per hour. That's because they do not cost overhead, benefits and are legally responsible for their own equipment and all operating costs, from insurance to taxes. That is why it is important to ask for documentation of legal status. The higher cost is also because they:

- Get things done quickly and on deadline and often have relationships with vendors that drive down some of the hard costs of a project (like catering or printing).
- Can get a unique or “solo” project done (a very special event or new program) because it may be their only focus, unlike what your busy staff face every day.
- Gain new insights into a situation, because they've already done these projects for others.
- Problem-solve new solutions to issues or barriers that may be currently affecting organizational performance. People tend to trust them because they're the “independent third party expert.”

### **Common contract options and terms**

Because of the open-ended nature of a scope of work, the client (you) and the consultant may agree to:

- An open, hourly billing system (depending on your location, most consultants bill at least \$175/hour),
- A project retainer, which may be subject to “change of work” orders if your organization alters or makes additions or changes to a scope of work.
- A flat project fee.
- Do not be put off by a high hourly rate. Savvy consultants should offer you audited hours along with their invoice. You may be surprised at how fast and cost-effect they are.
- Ask what they've charged for similar projects with other clients. <sup>[[</sup>SEP]

### **How do they manage their time?**

- It is the consultant's responsibility to monitor their time, define and, if necessary, refine the scope of work.
- Depending on your agreement, they log hours worked, although mileage costs should be part of the overall cost you agree to, unless otherwise noted. Contractors usually build those costs into the contract.
- Make regular “check-in” times, even by phone, text or email, part of your agreement to discuss progress.

### **What questions should you ask a consultant?**

- Consultants should be able to address how and why they bill.
- They must be able to document their legal status as a licensed independent contractor.
- Ask for references, especially from other districts or public organizations. They should have a list handy, or if they have a website, look for testimonials.

- Interview them much like you'd interview an employee candidate. They should treat this opportunity as a job interview.
- Ask to see their portfolio. If they're able to post some work online, that's a good sign, although realize their work is proprietary. Make sure they use a variety of tools, from social media to printed publications (your active senior voters still read those.)
- Judge their seriousness about learning your needs. They should ask for data, access to your communication tools, and they may even ask for a list of parents, businesses and other key communicators to contact, depending on the depth of the work you need.
- If they are providing photography, clarify how often you may use their photos, (i.e., who "owns" the photo?). Some photographers allow a one-time-only use since they own the rights to their work.
- Ask what they've charged for "similar work" with other clients.

#### **What questions should you expect the contractor to ask YOU?**

- The questions they ask will tell you whether they're a good choice. Don't let a consultant waste your time. Within a 60-minute interview, they may ask for everything from your organizational chart to your mission statement. That's okay. But don't overshare before a contract is signed.
- If the work is under a formal RFP, most of the questions about the scope of work should already be answered. However, the consultant should be entitled to ask questions about individuals or teams they may be working with and how the work is to be approved.
- The scope of work of the project may dictate that the consultant (after they are hired) will need to interview and speak to several other staff members.

#### **Where do you find them? Word of mouth? What qualifications should they have?**

- Consultants are typically listed on their professional association directory and have a strong online presence.
- Meet them at workshops, civic events, or through articles they've published.
- Ask colleagues and non-biased third parties for a referral.
- Consultants should have background information detailing education, experience any credentials and details about how they work.
- Do not choose a consultant exclusively on their LinkedIn account or website. Meet them face-to-face or on the phone. Many great consultancies are now virtual.

### **SIDEBAR**

#### **Consultant hiring checklist**

DO hire based on personality and past performance. There must be a good feeling of trust in a consultant.

DON'T expect them to meet with you or your team more than two times before you are able to either accept or decline their services.

DO expect the consultant to ask lots of questions about your organization before and during their work. It shows they're doing the research.

DON'T expect "lots of emails." Good consultants let their clients know what they are doing, but don't "nag" with too many email reports or phone calls.

DO use a formal RFP process for long-term or major work, including a time, before the RFP is due, when the consultant can ask how you think progress.

DON'T expect a consultant to know your organizational culture instantly. But DO expect them to pick up on these important internal realities very, very quickly.

DO rely on first impressions. The consultant's "vibe" should be revealed by a face-to-face interview followed up by calls to references.

DON'T sit on the bill. Most of us folks are very small businesses with big bills to pay.

DO ask for regular reporting, especially if the consultant does not offer this. Most will have several types of progress reporting tools in place to offer. Hint: professionals love to see results of their work, which encourages them even more. There's nothing more frustrating than to recommend a plan and not see progress being made.

DO expect accurate invoicing — no "sticker shock" when the consultant invoices your organization.

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*Contributed by Shannon Priem, APR, former public information director for the Oregon School Boards Association; senior content specialist for Salem Health.*