

Steps in Consulting

Step 1: Entry and Contracting

Initial Contact: Learning about the church and identifying the group for possible work, which could use my skills.

Hints:

- ! Being aware of my own goals.
- ! Work with potential rather than failure.
- ! Initial assessment of readiness.

Entry: Beginning to establish a relationship with the church to explore possibility of a contract, building a climate of mutual confidence, beginning of your role as educator to teach change skills.

Hints:

- ! Begin to establish norm that consultant complements the work of the church, rather than doing it for him or her.
- ! Begin to build team in which consultant is seen as peer, not miracle worker or flunky.
- ! Making contact – not presenting facades to each other.
- ! Defining boundaries – what I will and will not do.
- ! Developing mutual understanding that consultant is a temporary part of the system.

Contracting: Negotiating expectations, time, financial cost, goals, boundaries of the work.

Hints:

- ! Be clear – who is the client?
- ! In writing, if possible.
- ! Get clear definition of the problem, situation, issue from the church.
- ! Explore the implication of change – begin to build awareness of the process of change.
- ! Be clear – to whom are you accountable?
- ! How will you know when you are done?
- ! Contracting and recontracting – an ongoing process; when the contract has changed, openly “name” it.

Step 2: Data Collection and Diagnosis

Mutually working out where the church is and where the organization wants to be.

Mutually define the data needed, gather data, discuss implications; analyze and interpret, discuss deeper concerns.

Hints:

- ! Don't overload.
- ! Use theoretical frameworks to analyze.
- ! Be specific about the problem, situation, or issue.
- ! Enable the church to do their (or the organization's) own diagnosis.

Step 3: Feedback and Decision To Act

Working on the problem and collecting facts (also part of diagnosis above), posing alternative solutions, selecting a course of action.

Hints:

- ! Build more than one action plan.
- ! Test the possible consequences of alternatives.
- ! Be clear about accountabilities (who is responsible for what?).
- ! Remember who owns the problem (the church must own the solution).
- ! Descriptors (knowing when task is done)

Step 4: Implementation

The plan in operation.

Hints:

- ! Needs to be monitored – evaluate and adjust.
- ! Watch (out) for effect on other parts of the system.
- ! Consultant may need to provide support during this risk-taking stage.
- ! If it is failing – STOP! Move to an alternative – be flexible about plan.

Step 5: Extension, Recycle, or Termination

Evaluation: Checking results with desired goals.

Hints:

- ! Evaluation is part of the process every step of the way.
- ! Evaluation is beginning to diagnose again (cycles back).
- ! A well-written goal statement lets you know if it is accomplished or not.
- ! Consultants often want to avoid evaluation (church may collude in this).

Exiting: Dealing with termination.

Hints:

- ! You are temporary and your value is in being an outsider.
- ! To the extent that you built the confidence and competence of the church, this will be easy.
- ! You discover the advantage of having your own support group.
- ! Arrange to check back in six months for further evaluation.
- ! Final report can bring explicit closure.
- ! The point of exit should be clear early in the process.
- ! Help the church find a way to celebrate the work which has been accomplished.