The challenge of administering Christian schools around the world continues to change and grow. Whether the challenges are governance issues, management problems, legal/compliance matters, or financial management, it seems that there has been a real growth in the level and complexity of issues faced by Christian school administrators and boards, regardless of the countries where the schools are located. In recent years, schools have handled these increasing demands in three main ways:

**Ignoring the Issue**

School boards or management can sometimes try to ignore developing issues through complacency, either believing that the status quo has always and will always work or praying that the problem will just go away. Such a lack of action will usually jeopardize the school’s operation in the medium to long term.

**Adding Staff**

A school may just employ more staff in an attempt to solve all its problems, often selecting highly qualified staff at higher salary levels. The net result is relatively highly paid staff who are doing lower-level jobs. The salary bill often starts to rise faster than increases in school fees, and eventually the staff structure becomes unaffordable for the school.

Using an external consultant as an advisor for a one-off project or as an ongoing advisor who journeys with the school over time and focuses on specific issues. In this scenario the school is actually bringing in expertise as and when required rather than paying for it all the time.

**Why Use an External Consultant?**

External consultants by their very nature can add value to the school and assist in making critical decisions. Schools are generally busy places, employing staff who are normally fully engaged in day-to-day operations—a situation that can make it difficult for the staff to pull back and get an objective perspective on how things are going, not to mention actually having time to complete special projects! Schools are also usually governed by volunteer board members who have limited time and sometimes limited experience in working through school issues. Therefore, many schools have a limited capacity to get critical things done.

An external consultant can bring his or her experiences in a specific field, often with far more detailed knowledge of an issue than a generalist has. In using a consultant, a school will often also be able to learn from the issues and experiences of other schools and organizations.
Getting External Help: Using Consultants Effectively

Consultants Making an Impact

There are a wide variety of services in which consultants can assist a school, including governance, planning, buildings, finances, marketing, legal matters, human resources, communications, and curriculum. Some of the areas in which I have seen consultants make the most significant positive impact in schools are the following:

- board training and governance restructures
- financial restructures, including staff reductions
- negotiation of property purchases or sales
- negotiation of loan terms with a bank
- development of an overall school image and marketing plan
- articulation of the school’s vision and mission, and development of a strategic plan
- performance evaluations of key management staff
- executive coaching or mentoring of senior staff
- management reviews and financial system reviews
- special development projects over and above day-to-day operational needs
- development of site plans and building master plans
- applications for government funding (where available)
- information technology planning, development, and maintenance

Case Studies

Many schools are not familiar with the use of an external consultant, and they may be a little unsure about using one. There are always horror stories about organizations spending lots of money for little real benefit. The following case studies are real-life examples that show what not to do or what to look out for in situations in which schools used consultants.

Waiting Too Long

A school had a number of tumultuous events take place in the school community, and those events resulted in a sharp fall in enrolment; at the same time, the management was engaged in out-of-control spending. The board began to recognize the problem but procrastinated for 6 months, hoping and praying that the financial issues would go away on their own. Finally, the board called in consultants to try to solve the problem, but the board had waited too long. The problems were actually far worse than the board had imagined, and the school’s financial shortfall was now very large. The school battled for the subsequent 18 months to make the necessary changes, which included the termination of a significant number of staff. But the efforts were always attempts to make up for the delay in initial decision making. As of today, the school has still not recovered, and it teeters on the edge of closure.

Adjusting Staffing Levels

A large school had an extensive ministry in a wide range of areas and paid relatively high salary levels to have the expertise it required on staff. As a consequence, the school became overstaffed, and its salary bill increased even further. The school ended up having too many chiefs and too many Indians! The required adjustments, when they finally came, were a major staff reduction and the closure of many key activities of the school, a closure that had a direct impact on the school’s ministry to students. It would have been more efficient and financially more sustainable to bring in the expertise as required at various times on a contract or consulting basis rather than to increase staffing levels.

Not Understanding the Mission and Culture of the Organization

A school that had grown rapidly in a relatively short time was having staffing and administrative system problems because of the rapid growth. The school’s board
recognized this challenge and sought advice from consultants in order to assist the school in its development and operation. Initially, the school engaged a management consultant who was a friend of one of the board members. The school received a report that provided recommendations that did not answer the issues the school was struggling with, and the board experienced difficulty in managing someone who was so closely connected to the school.

A school can experience significant benefit in using a consultant to help when things are going well, such as during expansion.

After 12 months, the school engaged a second consultant, and this time a team came from a large international consulting firm. A very expensive report resulted, providing a range of complex recommendations that conflicted with the school’s culture and ministry focus and that the school could not implement. At the end of the process, it was clear to the board that the consulting company did not really understand the school or its needs.

Another 12 months later, the board engaged a third firm to undertake the same consulting assignment. This time the board carefully constructed the brief for the assignment and researched the firm to make sure it aligned with the school’s values. The result was an extensive report that provided practical solutions that fit the school’s Christian culture and solved the school’s problems.

Not Controlling Costs

A school of around 600 students wanted to freshen up its image and have a good presence on the Internet. The school brought in an external consultant to help with the design of a new website. The school had no previous experience with such a setup, and the exact deliverables and costs involved were not properly agreed to up front. The result was a website that was only partially functional, a reliance on the consultant for even the most minor change, and a final cost of over $40,000—well in excess of what the project should have cost the school.

The Process of Obtaining and Using a Consultant

Some cynics will say that consultants are people you pay a lot of money to tell you what you already know. Whilst there is sometimes an element of truth in that claim, sometimes we need to hear things from someone outside in order to make decisions and deal with issues. Sometimes when I recommend a course of action to a client, the client responds, “We could have thought of that.” But the reality is that these clients had not done anything about the issues regardless of having thought of possible solutions!

The way a school obtains and manages a consultant will often be key to the final outcome the school experiences. The following are some handy tips for working with a consultant:

1. Before you talk to anyone, write down in less than a half page what you think the issue or problem is.
2. Decide what your approximate budget is to engage someone to help you undertake the required work.
3. Decide what the broad outcome is you are trying to achieve in engaging a consultant.
4. Think about what your time frame is to have the work undertaken, when decisions need to be made, and how this time frame fits in with your school’s operations.
5. Have internal discussions and reach, in principle, agreement at the relevant level (board, management, or both) about the broad scope, costs, time, and other facets of the project before going into too much detail with a prospective consultant.
6. Find out whether there are any consultants who have handled the issue you are looking at. If you can, obtain feedback from their clients.
7. Ask your potential consultant(s) these simple initial questions:
   - What experience do you have in the area we are looking at?
   - Can you provide references for relevant work you have done?
   - How do you protect a school’s confidential information?
   - What is your contracting/proposal process?
8. Make sure you have a written proposal/consulting agreement in place and signed before work commences. This signed agreement is particularly important in large-scale, high-value, or extended-time-frame engagements.

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9. In reviewing the costs included in the proposal, ensure that the basis of the fees is clear. To avoid a cost explosion, be wary of open-ended hour-based fees that have
no cap. Similarly, make sure you understand how the consultant charges out-of-pocket costs and costs such as travel and photocopying.

10. Make sure your consultant carries the appropriate insurance. Unfortunately, from time to time things will go wrong in a consulting assignment, and it is important to know that the consultant you are working with is properly insured. Carrying such coverage as professional indemnity insurance can also be an indicator of quality operators who take their advice seriously and who are not likely to disappear on you.

11. Once the assignment is underway, check on the progress. Make sure things are going according to plan in terms of time, costs, and outcomes. It can often be helpful to ask the consultants if they are happy with their progress and whether they are obtaining all the information and assistance they require.

12. At the conclusion of the consulting assignment, when you have received the report and recommendations, ensure that you ask questions and seek clarification on the recommendations. To get the most out of the recommendations, you need to have a clear understanding of what the consultant is thinking in making those recommendations. If there are lots of recommendations, ask the consultant to prioritise them for you.

13. Look for potential opportunities to use the consultant’s knowledge of your school for other areas that you require assistance in or for the implementation of recommendations the consultant has given. This strategy maximizes the knowledge that you have paid the consultant to obtain about your school.

Make sure your consultant carries the appropriate insurance.

School boards and administrators cannot be expected to know everything and to be able to tackle every issue or problem that they have to deal with. The use of an appropriately skilled and experienced consultant can be of great benefit to a school, especially if the school engages the consultant to deal with an issue early on or to assist in making critical decisions at key points in the life of the school. The up-front cost of a consultant can actually be quite small in the overall scheme of governing and managing a Christian school in its quest to serve God and touch the lives of students.

What’s in a Proposal?

A clear proposal or consulting agreement helps the school and the consultant have a better outcome from an assignment. The proposal should include the following:

- **Scope** is a brief outline of the project or projects to be undertaken so that the school and the consultant understand and agree on what is to be covered and what the key issues are.
- **Deliverables** are details of what the school will receive from the consultancy, such as written materials, a report, advice, or a presentation.
- **Time frame** gives the date when the consultant is going to undertake the assignment, as well as a completion date and key milestones.
- **Fees** establish how much the consulting assignment is going to cost, what the basis is for the fees, and whether there will be out-of-pocket expenses.
- **Consulting team** is who will be undertaking the work. It is good to have a brief bio on the person or team who will be working on the project.
- **Info requirements** are the materials, information, or both that the consultant needs for the project. If a school meets those requirements up front, it can help make the consulting assignment run more smoothly and less expensively.

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