

*The David and Lucile Packard Foundation
Organizational Effectiveness Program*

Elements of a Good Consultant Workplan

<i>A good workplan:</i>	<i>for client/grantee:</i>
gives brief summary of the background of the organization and its work, and the issues and/or challenges it is facing at present	demonstrates consultant’s understanding of the client's issues and needs; provides an opportunity to raise additional concerns/needs
states the specific objectives to be achieved by the consultancy	able to see that their objectives for the project and the consultant’s objectives are in good alignment, and if not, provides an opportunity for clarification before the consultancy begins
explains the consultant’s “theory of practice” and/or methods to be used to achieve the project goals	educates the client on the consultant’s approach so that they are able to understand and supervise the work
provides a timeline that (a) shows when major tasks will be undertaken and articulates clear achievement milestones, and (b) describes how time is allocated to the various activities described in the workplan	(a) able to better understand sequencing of work within project and how it will fit into the other work of the organization; (b) allows an opportunity to negotiate with consultant on how time is allocated to key activities, if needed.
lists major work products or deliverables , and incorporates a budget that keys payments to specific tasks, objectives, or deliverables	helps client to see and understand exactly “what they’re buying” and to expend grant funds responsibly
specifies what the client’s roles and responsibilities are during the project (in addition, of course, to the consultant’s)	establishes realistic expectations regarding the level of involvement that will be required of organization staff
states what will be different as a result of the consultancy, in terms of staff learning and the organization’s effectiveness	makes explicit how the project relates directly to the grantee organization’s overall objectives re: effectiveness
describes consultant’s relevant experience and provides a list of clients and specific projects related to the proposed work	enables client to evaluate the consultant’s expertise and to make a well-informed choice about an appropriate consultant