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Considering Professional Consultation

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In community affairs there are occasions when it is advisable, or even necessary, for a government unit or a civic organization to use the services of professional consultants. Many of the decision-making issues are quite complex. To understand and appreciate what is involved, specialized and technical knowledge may have to be made available.

Professional consultants can serve as an important source of vital perceptions. At times, even in the same decision area, the counsel of several different types of experts is in order.

Consultation

A particular kind of service available from many of the professions is consultation. For example, accountants, attorneys, engineers, management specialists and planners are among the types of experts who customarily offer consultative services as part of their professional practice.

Professional consultation involves asking a qualified specialist to study a situation related to his or her area of expertise; to provide advice and to render opinions concerning appropriate actions for handling the matter. Often, it involves joint deliberations and conferring between the consultant and those who have the responsibility to make and implement the decisions.

In other kinds of professional services, the expert may be expected to make the necessary decisions or to carry out completely a particular operation. In consultation, however, his role is as an adviser rather than an operative. These two roles, in practice, are difficult to separate, but in attempting to effectively use professional services, it is important to recognize the distinctions between them. The relationship between the professional and the client is considerably different when he or she is employed as an operative than when he or she is a consultant.

Thus, an engineer or an architect who is hired to supervise a construction project has the responsibility to make the decisions necessary during the construction to build the facility in accordance with the plans and specifications. Unless a significant change of plans is involved, he or she is expected to make the required decision and not to burden the client with constant decision requests. In contrast, when an architect or engineer is employed to provide advice and counsel, the basic decision making is not the professional's prerogative, but the client's.

Whether there is one or several professional consultants involved with the same decision-making group, the service provided by them is help to develop the basis for decisions and to provide considered suggestions. It is not to decide for those responsible to make the choices.

Since professionals in consultative relationships do not take on the responsibility of decision making for their clients, it is difficult for some people to recognize the advantage in using consultants. However, objective information and thoughtful advice of the kind consultants ought to supply is of real practical value. Effective and appropriate professional consultants can aid those attempting to make decisions in a number of ways. These include such helps as:

- Improving the accuracy of the general view of the situation.
- Bringing attention to aspects that ought to be included in considerations that otherwise would have been overlooked.
- Helping clients think more sharply about their objectives and do a better job defining goals.
Expressing potentially practical alternatives.
- Working out some means to provide some testing to alternatives.
- Giving some basis on which to predict the consequences of certain actions and alternatives. Providing support to confront sensitive issues.
- Teaching about the things involved in the decisions.
- Expanding the resources available to the decision-making process.
Stimulating through new or different ideas.
- Saving time and energy in accumulating needed information.

There is no doubt that proper consultative services from qualified professionals can pay real dividends by enhancing the quality of decisions. But, as some people would question this, there are those who expect too much of consultants. It is not so much that they overestimate the consultants' value, as they misunderstand their function.

They expect that once the consultants render their report and make their recommendations, decision making becomes a simple matter of putting the yea or the nay on the suggestions submitted. In effect, they think the consultants decide and their clients merely sit in judgment to formally accept or reject. The productive use of consultants is improbable when clients are not prepared to do their share and simply deter to advisers. Effective consultation depends on a mutual relationship between consultant and client, with each doing their part.

Experience indicates that when difficult and complicated matters are the subject, the input of consultants sometimes make the process of coming to a decision more formidable. This should be expected, as it tends to bring the demands of decision making more in line with the demands of the actual situation. The fact is, quick and easy decisions are more likely when those making them are unaware of many of the factors actually involved.

Qualified consultants are likely to expose conditions, considerations and options previously left out. The effect of using an adviser in this case may not take away the hardship of reaching a decision. Rather, it provides added capacity to find and take into account all major features required for proper and effective decisions.

Note

The use of consultants should be viewed as a means to better, but not necessarily easier, decision making

As long as professionals are functioning in the consultant role, they do not bear responsibility for final decisions. This does not relieve them of heavy responsibility to perform to the best of their ability. In many ways, serving in an advisory capacity is more difficult than exercising decision-making authority. Advisers have to take into account more than their own feelings, thoughts and orientation concerning the issue. They must engage in concerns with the position, predilections and points of view of the client in mind. While aware that they must support the client in the effort toward quality decisions, consultants know their best information and recommendations are likely to run counter to the client's initial preferences and expectations.

Professional advising is not a matter of simply agreeing with the client and lending the consultants professional status to predetermined conclusions. When consultants enter the relationship with the clients, they can never be sure whether eventually their findings and suggestions will reinforce or challenge the thinking of those who employed them. At one level, they must make independent judgments and at another they have to make sure their work serves the needs of their clients and can be integrated with other aspects

of the decision-making process. Advisers are required to understand the predicament of their clients. They must know how to bring their special knowledge to bear for the benefit of those seeking their aid and how to productively communicate so their contribution is useful to the clients. Consultants must be responsive and flexible, while being completely honest and maintaining their professional integrity.

Consultants, then, have a demanding task. Some of the elements of their job that might be involved include:

- To accumulate or create accurate information.
- To determine and abstract from the information what is most relevant to the concerns of their clients.
- To arrange relevant information in a way most understandable and useful for the purposes of their clients. To communicate the information effectively.
- To explain the implications of the information in the context of the specific situation at hand. To outline any alternatives that appear feasible from their perspective.
- To clearly state insights, opinion and biases that they have developed in the study of the matter.
- To sufficiently acquaint clients with their points of view, methods of study and the limits of their professional competence so the clients can evaluate their contribution.
- To offer, overall, their best judgments and recommendations.
- To avoid allowing themselves to be drawn into making authoritative statements and recommendations beyond those warranted by their own specialized knowledge, training and experience.

Considerable controversy may surround the question of securing services of professional consultants. Anytime a government body or a civic group considers spending money, there are possibilities of conflict. When what they are attempting to buy is good advice and counsel, settling conflicts over it can be more trying. With items such as equipment, facilities and operational services, it is easier to see both the good and bad aspects of securing them. It is hard to judge, however, the exact value of advice beforehand when there is little indication of what that advice will be. Even so, as the complexity of issues on the public agenda increases and tends to involve larger technical components, specialized information and advice become more necessary.

At times, in the beginning stages of the development of an issue, it is even hard to see far enough ahead to know the various kinds of experts who should be sought out for counsel. The attempt to get competent advice is required for reasonable decision making in more and more cases. This is a condition of the present era that has to be faced.

Governments and civic bodies can no longer always get by without competent professional help. If their regular sources of technical assistance do not have the expertise to supply the required information and counsel in a particular matter, they have to seek it elsewhere. That use of outside consultants may be controversial and may complicate the decision-making process does not relieve officials and citizens of the duty to have available what is needed for making sensible decisions. Often the option, without paid professional consultation, is to make decisions without knowing very much about their consequences.

No relationship is going to work out perfectly right away. The adviser-client relationship will require learning on both sides.

Governments and civic organizations must learn how to use consultants to advantage.

Many professionals have to learn how to function as reliable and understanding advisers, rather than trying to completely take over decision making.

Officials and citizens are going to have to increase their respect for objective information and studied advice.

Consultants will have to improve their respect for the intelligence and capability of public bodies and citizens to deal with many-sided questions. Officials and citizens will have to get used to accepting realistic time requirements for making good decisions and reduce their expectation that experts should provide instant answers.

Consultants will have to do a better job in staging and pacing their work to more closely conform to the situation of their clients.

Officials and citizens have to learn not to insist consultants study issues and make authoritative recommendations beyond the scope of their specialty. Consultants will have to exercise increasing care not to present themselves as experts in things beyond their competence.

Selecting the consultant is extremely important. Professional consultation cannot be secured on a bid basis. There is a personal element in the talent of professionals demanded for a particular advising role with a particular decision-making group that cannot be reduced to standard specifications. The consultants' technical expertises, their comprehension of the clients position, and their facility in performance as an adviser have to be taken into account.

Unless the government unit or civic group has worked with the particular consultant before, they have to inquire before choosing. Even when they have had a rewarding experience with a particular consultant, care has to be taken not to use this adviser in a circumstance not appropriate to his or her professional proficiency and qualifications.

Selecting a consultant should be based on making judgments about:

- Skill in the role of adviser.
- Professional capabilities.
- Appropriateness of experience.
- Previous performance.

Initially, help can be obtained from professional associations or other service agencies concerning the scope of expertise that can be expected from particular types of professionals. Often, help is available on how to go about the process of making a choice of consultants from specific professions. It is almost always advisable to interview several consultants, all of whom are qualified on the basis of professional credentials. The general rules that apply to most cases are:

- Explain clearly to the professional to be interviewed exactly what your situation is.
- Be uninhibited in asking questions about any pertinent aspect, including fees.
- Respond honestly to questions posed by potential advisers.
- Be unafraid to require references, examples of work or take other steps to get some measure of previous professional performance in similar situations.
- Be willing to act on the information, suggestions and material developed in the inquiry and interviews.
- Do not be reluctant to learn from the process of selecting an adviser and change approach and expectations when it is indicated.

Note

Consultation often is used to refer to any services performed by professional personnel who are not regular employees of an organization who work by contract or are on a retainer. In this guide, consultation is used in a more restricted meaning of serving as an adviser.

For additional information, contact your MU Extension community development specialist through your local MU Extension center, or the Department of Community Development, MU, Clark Hall, Columbia.

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- DM404, The Study Committee and the Community
<http://extension.missouri.edu/p/DM404>
- DM460, A Plan for Small Group Discussion
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- DM463, Decision-Making Techniques for Community Groups
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