CONSULTANTS
DEVELOPMENT
INSTITUTE

Syllabus for
Organizational Consulting in Nonprofits

- Program includes seven virtual Modules that participants and faculty schedule ahead of time
- Each module includes:
  1. 1-2 hours of assigned readings from the text and other supplemental materials
  2. 90-minute virtual seminar with faculty and learners to discuss highlights from the readings and to address questions from learners
  3. 90-minute virtual peer coaching with faculty and learners to a) reflect on learners' past applications of program materials, and b) help each learner plan how to apply this module's materials in life and work
- Each learner participates in an ongoing private email exchange with faculty and fellow participants
- Each learner documents ongoing learning and actions in the learner's Learning and Development Journal
- Program meets part of the requirements for "Certification in Organizational Consulting in Nonprofits"
- For more information about this program and certifications, see ConsultantsDevelopmentInstitute.org
- Each of the following topics is presented in the context of consulting in a nonprofit organization

Module #1 – Intro to Program

Pre-Readings and Reflections

Overview of Program
Overview of Peer Coaching Process

Meeting Activities

Introductions to faculty and learners
Team building among learners (as required)
Review of program agenda and materials
Overview and practice of peer coaching groups
Description of pre-reading before Module #2
Schedule all future seminars and peer meetings

Module #2 – Startup and Contracting

Phase 1: Client's Start-Up

Understand How Client Saw Need for Help
Understand Client's First Efforts to Change
Understand Client's Decision to Get Help
Understand How Client Selected Consultant

Phase 2: Engagement and Agreement

Arrange First Meeting with Client
Understand Client's Current Perceptions of Need
Clarify Desired Project Outcomes and Timing
Decide How Project Should Be Administered
Help Client Understand and Accept Evaluation
Learn Client's Style and Organization
Assess Client's Readiness for Project
Decide If You and Client Should Work Together
Develop Powerful Proposal and Contract

Module #3 – Discovery

Phase 3: Discovery and Feedback

Establish Focused and Aligned Project Team
Select Most Appropriate Diagnostic Model
Plan Useful Data Collection Around Client's Issue
Consider What's Unique About Client's Situation
Quickly Collect Relevant and Useful Data
Identify Useful Findings and Recommendations
Share Action-Oriented Feedback with Client
Ensure Client's Commitment and Buy-In

Module #4 – Action Planning

Phase 4: Action Planning

Ensure Collaborative Planning With Client
Develop Grand and Strategic Visions for Change
Develop Relevant and Specific Action Plans
Align, Integrate and Reality-Check Actions
Identify Specific Indicators of Project Success
Develop Plan to Evaluate Process and Results
Develop Plan to Identify and Collect Learnings
Develop Plan to Recognize and Celebrate Success
Develop Plan to Communicate Status and Results
Develop Overall Change Management Plan

Module #5 – Implementation & Change

Phase 5: Implementation and Change

Integrate Change Throughout Organization
Focus on Critical Ingredients to Maintain Change
Coach Client for Motivation and Momentum
Guide Client to Delegate for Ongoing Momentum
Use Tools to Track Status of Implementation
Systematically Adjust Plans If Really Needed

Dealing With Resistance During Change

What is Resistance?
Recognize Another Individual's Resistance
Respond to Another Individual's Resistance
Manage Your Own Resistance
Manage Interpersonal Conflicts

Although all learners should read all topics, different learners might choose to be coached on different topics in their peer coaching groups. Learners might choose topics that are currently very interesting to them or that they are applying in their consulting activities – *this is the essence of just-in-time learning*.

Module #6 – Adoption and Termination

Phase 6: Client's Adoption and Evaluation

Overcome Common Barriers to Implementation
Assess If Client Has Adopted New Systems
Evaluate If Project Achieved Desired Results

Phase 7: Project Termination

Understand Reasons Projects Are Terminated
Avoid Dependency and "Project Creep"
Identify Next Steps for You and Client
Formalize Termination of Project

Module #7 – Closing and Celebration

Prepare for Closing and Celebration

Reflect on program content and learning

Meeting Activities

Reflection from each learner
Sharing feedback about overall program
Acknowledgement and celebrating each member
Presentation of certificates of completion
(Learners might choose to pursue certification)