

How to Select a Professional Resource



Trust in the LORD with all your heart, and do not rely on your own insight. In all your ways acknowledge him, and he will make straight your paths.
—PROVERBS 3:5-6

Introduction

Now that your congregation has determined its needs, you may want a professional resource to assist you in reaching your goals. Here is a checklist for selecting a professional resource, including:

- *Scope of Work*
- *Selection Process*
- *Service Agreement*
- *Evaluation*

We encourage you to enter this process deliberately, with “an inquiring and discerning heart.” Your congregation’s vision and commitment, combined with professional expertise, often enhances the success of a project. You will need to create a budget, hire the best professional you can within that budget, and invest your time and energy into building a successful working relationship to achieve your goals.

Scope of Work

Describe your project and the role of the professional. Often this is called a “Request for Proposal (RFP).” It might include the following elements:

- *Description of congregation’s context, needs, and goals relating to this project.*
- *Why you are seeking professional assistance for this project.*
- *Timeline or key dates to complete the work.*



- *Specific deliverables expected from the professional (i.e., a written report, architectural drafts, cost estimates, etc.).*
- *Leadership person or group to whom the professional will report.*

Depending on the specificity of your needs, or the type of assistance you want, you might also ask targeted questions of professionals:

- *Can you provide references for recent clients you've worked with?*
- *How do you determine your fees/costs? (i.e., hourly rate or cost per project)*
- *Can you provide examples of organizations like ours with whom you've worked? (i.e., have they worked with churches, or with an organization of your size/needs)*
- *Who would be our primary contact? (With some firms, this may be a different person than the one who responds to your request/interview.)*
- *Why are you interested in serving our congregation/project? Do you think you would bring a specific talent/expertise to this situation?*

Selection Process

The selection process takes time. Plan ahead, knowing that it might take weeks or even months. Consider the following steps in managing the process and making your decision:

- *Determine who has authority to look for and select professional assistance (who gets recommendations, who interviews candidates, who can make an offer and sign a service agreement, etc.). Typically the rector signs such contracts.*
- *Determine lines of communication during the process (i.e., when to update the vestry or rector).*
- *Ask for recommendations from people you trust (ask within the congregation, call your diocese, ask neighboring congregations, check listings in professional associations).*
- *Consider the limitations and possible conflict of interest of asking members or friends of the congregation to perform professional services, or to receive services pro-bono. Should anything go wrong, it is difficult to "fire" a volunteer who is part of the church family. Pro-bono services may not give enough time and support to your project.*
- *Give your description to appropriate prospects. Set a deadline for responding.*



- *Review the responses. Consider who seems to be the best match in experience and style. Consider their level of interest and understanding of your situation. Give yourself choices—determine two or three that merit further consideration.*
- *Do reference checks.*
- *Interview your top choices.*
- *Prayerfully make a decision. Being a good steward does not always mean taking the lowest bid. Make sure they are a match for your congregation's culture and needs. Also consider their organizational ethics (i.e., labor practices, socially/environmentally responsible policies).*
- *Make an offer; provide a service agreement, or ask the professional to provide a draft agreement for your review.*
- *Discuss the service agreement to make sure both parties needs and expectations are mutually articulated and understood. Negotiate as necessary to arrive at an acceptable agreement.*

Service Agreement

The service agreement should cover many of the elements listed in the “Scope of Work” on page one. Depending on the type of professional assistance you’ve selected, the agreement may need to conform to professional standards in that field. It might include areas such as:

- *Professional services to be provided*
- *Congregation's responsibilities/participation*
- *Timeline/deadlines*
- *Deliverables*
- *Fees, expenses, and payment procedure*
- *Early termination*
- *Principal people involved*

When writing a service agreement, consider:

- *Examples from others who have written agreements for similar services.*
- *Asking a lawyer to review the agreement.*
- *Reviewing compliance with policies or laws for your congregation, diocese, or state.*

Evaluation

When your project is finished, it is often valuable to evaluate the experience. Two types of evaluation may be useful – the project itself and the relationship with the professional. Conducting an evaluation together with the professional will give you both insights.

Project:

- *Did it achieve your goals? Why or why not?*
- *Did it unfold according to the timeline? Why or why not?*
- *Did it stay within budget? Why or why not?*
- *What unexpected outcomes arose from the project (positive or negative)? How were they handled?*

Relationship/Process:

- *Did both parties communicate well with each other? Why or why not?*
- *If changes occurred in the project, how well did you resolve them together?*
- *Did the professional live up to your expectations? Why or why not?*
- *Would you use this professional again or refer them to someone else? If yes, decide if you would act as a reference for the professional.*

In providing this worksheet on How to Select a Professional Resource the Episcopal Church Foundation is not providing any legal, financial or other professional advice. Please consult your own attorney or diocesan chancellor if you have any questions or concerns about applicable canons or state and federal regulations as they relate to your own congregation or particular situation.