

Thoughts on Becoming A Higher Education Consultant

While I'm not sure that higher education needs more consultants, I am certain that more of you should gain the experience of consulting. It's a great way to expand your higher education wisdom, while benefiting other organizations. Like many professions, there are too many old white men in it and too few others. I write this essay in the hope that others will be brave enough to give consulting a try.

I will also be defining consulting more broadly than is currently done. There is more to a good consultancy than presenting a technical solution to a known problem.

Arrogance You Don't Need

There is an old joke that a consultant is someone who steals your watch, then charges you for telling the time. Well, if you had a watch, why did you ask this guy for the time anyway? I think the joke is half true. Consultants often don't know more than you do, but they magically give authority to a technical solution they provide. That is perhaps the power of the myth of the invincibility of old white men.

In fact, when I took a job as the magical CFO who was to turn around a college on the precipice, the first thing I did was fire all the consultants. There is nothing they were doing that couldn't have been done by people in the organization. What I could never do as an insider, however, is show people what the institution looked like from the outside, all its strengths and flaws.

Thus, as a consultant, you should be humble about your technical skills. That humility, as I will discuss later, will allow you to maximize your assistance to the organization.

A Technical Proficiency

To begin, you will need to develop at least one technical proficiency that you can provide to another college. This may seem like a major roadblock, but it shouldn't be. You only must become very good at something you do as part of your job. I was a CFO. I became good at understanding budget systems. That became a consulting specialty for me.

Once, I needed to add several federal financial aid programs at a university. I hired a person who was a financial aid director and consultant. She did a wonderful job of setting up processes and getting the university through its first financial aid audit successfully. She was very good at her job, allowing her to add consulting on the side.

Perhaps you have been working on a new approach to academic counseling or managing residences during a pandemic. Perhaps you have tested and improved on a new way to assess distance education that someone else developed. Most of you have the drive to become excellent at what you do. The thought that you might provide your knowledge to others should push you even harder.

But your success at home is only a first step. The solution you have for your own institution will rarely work perfectly at another college. You must go to the literature and find other approaches. You must build an understanding of the strengths and weaknesses of each alternative. Even if your solution would work at another place, there will be powerful people at that other institution who have fallen in love with an alternative. You must be prepared to defend your design.

As a final preparatory step, you may be able to design a mini-internship. Is another college working on a problem in which you have developed expertise (and where you have a professional contact)? You can

offer to observe and help. It's a great way to develop sensitivity to how differences in size and culture affect solution design.

Exposure

I benefited greatly from the contacts I made at my national professional organization (in my case, NACUBO). These organizations are always looking for articles for their newsletters and magazines on successful approaches and lessons learned in their areas. Read the publications. Call them and find out what they are looking for. Read the guidelines they provide for articles. Write! Expect to be rejected. Write again!

Volunteer for committee work with your professional organizations. Convince your contacts at the professional organization that you have much to give. While experience is a wonderful teacher, not all good teachers are experienced. Sometimes those who are closer to youth see situations more clearly than their elders.

Professional organization staff can be your best cheerleaders. Even when NACUBO was unwilling to say, "Nate is good at this," they would let me know when an RFP was floating around. They were both helpful and encouraging.

Giving workshops provides the best exposure. The first step to gaining a foothold is to present at regional and national conferences. Don't just jump into that, however. Take a short course on giving presentations first. Practice at your college. A good workshop presentation is interactive and fun. Learn to do less with PowerPoint and more with small breakouts, games, and simulations.

Be active in your profession. Ask your peers questions. Sponsor local conferences. Be known!

Listen

You will find that it is rare that the solution you have in your pocket, that worked back home, will work at another place. Not only is this other institution different in its culture and processes, the real problem here might not be the same problem you faced back home.

In most cases you must not only listen, but you must teach them to listen to themselves. I was once called to an institution that wanted a new budget system. The old method was centralized and authoritarian. The provost convened a large committee from across the university. I sat with the committee and refrained from offering a solution. I just kept asking questions. As the day wore on, the people in the room began to realize that the budget system was not the problem. The problem was a larger one of clashing cultures between academic and administrative areas. There was no trust at all between the areas. The provost thanked me, said he learned a great deal and sent me on my way (and paid me). Listening means being open to finding that the problem is not one that you have a solution for.

While this may sound like the easy part of consulting, listening is not easy for some of us. As I got more deeply into consulting, I found that I had managed to be a vice president for many years without ever learning to listen. I was the big guy. I had the answers. Why should I listen?

Listening takes concentration and intensity. It requires that you reflect, not only the substance, but the hidden assumptions behind what you are hearing. You must constantly be asking, "Let me see if I

understand you? Did you say...?" Sometimes you will hear fear. You need to capture that. You can ask, "What would you say is the probability of that happening?" Help them clarify their thinking. Keep digging for the real problem.

To help an organization effectively, sometimes it is best to listen to everyone who thinks they will be affected by a solution. Choosing a solution and implementing it is a social process. The whole organization must be brought around. Our image of decision making is an individual making a choice. This is rarely the case. In most situations, decisions are slow social processes, like the diffusion of red dye into water.

A community college asked me to help them decide whether to buy or build at home a complete administrative software system. They said they had spent seven years trying to decide this question and had not found a solution. I was bold enough to respond that I would spend five weeks with them listening to as many people as possible and would help them understand the decision and help them decide. They gave me the contract.

To get them to listen to each other, I got a link on their home page to connect to a blog I developed. Each day I posted a summary of what I had heard in my interviews without attribution. I wanted honesty.

There was a lot of fear regarding a home-grown solution, although the current software, while aging into inadequacy, was home grown and had served well over many years. My technical support consisted of showing them how to make decisions considering risk (something I'm sure that their business professors could also have done). I also contacted software suppliers and got estimates—also easy.

After five weeks, I was able to show them how several software solutions could be compared. The solution showed that the risks of home-grown software were quantifiably too great. One software solution was the most favorable. They, however, chose what was my second-best solution (not home-grown) and moved forward.

The lessons here are that my technical expertise was not unique, and, in fact, somewhat inadequate in that they chose another solution, but that helping them listen to each other allowed them to make a decision that had festered for seven years. A year later I got a report from them that they had a successful implementation and were very happy with the solution.

Active listening also means being able to hear the culture. A culture is a set of expectations of proper behavior. Two groups will be in conflict on a campus, because their expectations of behavior differ. Behaving normally within one group may be considered rude in the other.

At a university on one of the Caribbean islands, I led a discussion on the future of the institution. I noticed a fair amount of hesitation and, I thought, even tension during the discussion. Each time a transplanted New Yorker, a small group there, spoke, a person who was perhaps born on the island quickly took issue. Both groups had African heritage, but I sensed that the island culture resembled the culture I had seen at Historically Black Colleges and Universities in the south. I asked, "Did the northerners say 'good morning,' when they entered a room?" There was a murmur, and someone said, "Generally, no." I asked, "Was this considered rude?" "Yes," was the response.

The discussion that followed was a little rough, but necessary to clear the air before the future of the university could be discussed.

Learning the culture is part of good listening. Behaving in a way that respects that culture and the people there is also important. As a rule, say, “Good morning,” or “Good afternoon,” when you walk into a room, whether people expect it or not. Respect the culture.

Even if I am recording an interview session, I take notes. I want the person to know that I am actively interested in what they have to say. I admit, however, that when they are giving me a story I have heard many times before, I might be writing random words, but if I stop writing, then I won’t be listening when they move on to a new topic, and they will quickly pick up that I’m not interested in them.

Protect your sources. As you keep people updated on your progress and in your reports, never put others in a difficult position. Interviews should be confidential. Your report of the interviews should not allow others to identify your source. If, during an interview, they have negative comments about someone else, those should never be part of your reports.

Be transparent. If you prefer a solution, say so and why, but also admit that you are still learning about them and that this solution may not be appropriate for them.

Learn names. If someone gives you their name too quickly, don’t be afraid to ask them to repeat it. Make a mnemonic reminder, perhaps something about what they were wearing or where they sat at the table. Remembering a person’s name at the next encounter helps build trust, and it’s not that difficult.

You have already learned this in your current job: react to the substance of their comments, not their emotion. Active listening means *not* hearing that they don’t like you, as some on campus won’t—you have been brought there by their enemies. It means hearing only the substance of their comments. You do not have to say that their comment is good or bad, especially if you think that it is off the mark. While you may compliment an interesting insight, you should reflect back what you hear as the substance of the comment, making sure that you have understood the speaker’s concern.

Still, you need to be tough in your response. Demand data whenever possible. Has anyone tried to measure the problem that’s been brought up? Part of your integrity comes from your willingness to listen to opinions, while making them uncomfortable that you will discount these opinions until they can be supported with data.

Listening means doing your homework. If you are considering working for a Jesuit or Christian institution, for example, find out what that means to them. You need not take on those values, nor must you believe that the values are uniformly held, but being able to drag a discussion back to the center of a college’s mission is a good way to remind them of the shared values they can use to agree upon a course of action. Do your homework!

You have probably seen this on your own campus, I say, “So many hammers; so few nails.” Everyone has a solution, but no one has carefully defined the problem. They know the symptoms and want to treat those, but seldom know the causes.

The board of trustees thinks the university needs zero-based budgeting. This would solve all their problems. They bring in a budgeting system consultant. The consultant interviews many people. While

the current incremental budgeting system is clearly blocking strategic change, the problem seems to be that strategic change has never been on the administration's agenda. The consultant now must write a report that develops specifications for a new budgeting system, demonstrating the strengths and weaknesses of various systems against these specifications in a way that makes clear that the new system needs to be integrated into a systemic change system. The trustees read the report. Two days later, to the shock of the consultant, they fire the president. True story.

Still, there were no surprises in that report. The board and the people I interviewed understood the challenges that I was reflecting back to them. They were only guilty of thinking there was a "canned" solution. This is a good rule: no surprises. If you think you are on to something interesting, that others aren't talking about, get them talking about it before you pop it into a report. Consultants who deliver surprises are dimly viewed.

Be part of the solution

This is easier said than done, but I believe this will be part of the future of consulting. Build follow-up into the job. This might be as simple as adding monthly follow-up Zoom sessions with the implementation team.

People are disappointed when a consultant disappears after saddling them with a difficult implementation. If you have designed a solution with them, you should know more than they do about implementation. They may not be able to afford to bring you back for the implementation but will be happy to tell you about challenges and learn if you have suggestions.

Calling a client after a job and finding that implementation has been delayed can be disappointing, but remember, this is a learning experience for you too. Why has it been delayed? Could you have done something to prevent the delay?

Status

Colleges and universities, like hospitals, are status-intensive organizations. In your institution, your rank confers upon you a level of respect that carries over into the community. I have always believed that faculty could make more money as intelligent people in the for-profit economy but were partly attracted to academia because of the status they receive. Consultants, however, have no status. Most people on the client campus will be willing to politely listen, but don't expect the deference that you get on your own campus. You are equivalent to the dining hall beverage salesperson. You will be made to wait.

Professional tips

Dress professionally, well, but conservatively. You don't want your dress to create a distraction. You should always be more formal than your hosts.

You should charge a lot—more than you think you deserve. This works both ways. They will respect your advice more if it costs a lot, and you will work harder and think more creatively, if you value yourself more. Always make them aware of what you will be charging. If you charge by the hour, don't cheat. Charge only the hours you worked on their project. Don't charge less to win a job, unless it's something anyone could do. Then it's really not consulting. Consulting is work that they expect will solve a problem for them. They won't hire the low bid, if it won't solve the problem.

If you want to fly business, do not charge separately for your travel. Build the expense into your bid. This is advice only for those of us who are now “elderly” and really must avoid coach travel.

If you believe in the organization and think that your pay is a hardship for them, consider returning some of it as a gift. Do not lower your rates. You will find that this cements your relationship with them. Their word of mouth will be of benefit to you, as will the free tickets to hear their choir at Lincoln Center.

Involve your spouse or partner. I have been fortunate that my wife is a higher education administrator too and that we have some common interests. While it was rare, we did find that we could work on a job together and have fun. Not that there wasn't some tension but working through the challenges deepened our relationship. She greatly improved the quality of the final product.

Unless you can find a group to work with, for example, AACRAO (the national registrars and admissions officers' organization) Consulting, you should consider creating a limited liability corporation. The legal protections are minor (and professional liability insurance may also be a good idea), but the LLC registration makes it somewhat easier to be convincing that you have a business and need to write off business expenses for tax purposes.

Keep your eye out for partnership opportunities. I knew of others who were doing a little consulting. When an RFP appeared that might require more than just my expertise or where they had greater familiarity with the institution than I, I asked whether we might write a joint proposal. In other cases, we did “serial” consulting. They got the institution started and then turned it over to me to build a more specific solution. Partnerships expand your reach and facilitate your learning.

Be totally ethical. I was approaching middle age when an older, wiser friend challenged me on whether I was always ethical. I blustered, but slowly realized that I really had not thought carefully about how a professional must be constantly on guard against drifting into questionable practices.

Being an ethical professional means not taking advantage of someone, especially as a consultant, where you are working independently of oversight. While you can build into your hourly or daily rate a consideration for the overhead of marketing yourself and preparing for a job, you cannot charge days or hours spent before the contract starts, preparing a response to an RFP, for example.

If you fail in an attempt to build a solution, you must think hard about whether it is appropriate to charge for those hours. Perhaps you learned much, and the failure made the next attempt go more smoothly. Perhaps, some of the failure was a result of the client not providing sufficient information as well. You could then consider charging. If, however, the failure was a result of your inexperience, then perhaps you should not charge.

I have never been asked to do anything unethical by a client. I have, however, encountered unethical behavior at colleges where I was on accreditation visiting teams. I would never hire the consultants that those colleges employed. The lesson carries over to us. Do not become complicit in a client's unethical work, even if what you are doing seems ethical.

You should strive to go beyond ethical behavior and act with class. For me, this meant that when a client failed to pay me after two friendly reminders, I dropped the matter. Perhaps my work was not

satisfactory. Perhaps the invoice got lost in a management transition. I don't know, but I was not about to appear as anything other than enlightened.

Get feedback. You will find that you need to understand the experience from their point of view if you are to improve as a consultant. I have four basic questions that I ask in any assessment of an experience. 1) Did this experience meet your expectations, and, if not, why not? 2) Did you learn anything from this experience, and, if so, what did you learn? 3) Are you going to change the way you do anything because of this experience, and, if so, what will you change? 4) How can I improve the experience for others next time?

Teach what you learn. Consulting is a way for you to learn. Consider giving back by teaching. Teaching and writing consolidate what you have learned. Even the report for the trustees who wanted zero-based budgeting became a case in an MPA program.

Create space for vacations. Once you start consulting, you will find the experience addicting. I did. I had to go back to a regular job so that I could start having vacations. You should have more discipline than I.

Summary. You may not be a white man with a grey beard and an air of invincibility. You may be young, hard-working, and learning more than you thought possible. Consider sharing what you are learning. Higher education is going through changes. You could help.

Nathan Dickmeyer, July 2020