

catalyst:ed

The Consultant Roles

Who Does What and When to Call Them
A Guide to Getting the Right Support for Your Nonprofit



Getting the Right Help Starts with Knowing What You Need

In today's nonprofit landscape, external support can be a powerful accelerator - when it's the right kind of support.

But too often, organizations bring in consultants without a clear match to their actual needs.

The result? Frustration, wasted time, and missed chances. **This guidebook was created to help you avoid that.**

Inside, you'll find:

- 12 clearly defined consultant roles
- When to bring each one in
- What makes for a strong fit

Whether you're seeking help with strategy, funding, evaluation, internal alignment, or scaling your impact, this guide will help you pinpoint who can help and how.

12 Roles. 1 Goal.

Finding the Right Support at the Right Time

Consultants bring specialized expertise to help nonprofits navigate challenges and grow.

Not all consultants will be right for every project... and that's the point.

Use the following pages to dive deeper, understand each role's strengths, and discover when to bring them in.

In this guide, we break down 12 distinct consultant roles, grouped into four categories based on when and how they can help your organization.



**Understanding
the Situation**



**Developing
Solutions**



**Implementing
Change**



**Engaging
Stakeholders**

Start here when you need clarity before making decisions.



Understanding the Situation

RESEARCHER



Purpose: Brings in relevant data to guide your thinking.

- Investigates community needs, trends, policies, and funding landscapes.
- Helps inform key decisions and strategic planning

Bring them in when:

You need to understand the external environment or test assumptions.

EVALUATOR



Purpose: Measures what is working and needs to improve.

- Assesses impact, gathers feedback, and identifies areas for growth.
- Helps strengthen accountability and learning.

Bring them in when:

You want to assess a program's effectiveness or report outcomes to funders and stakeholders.

Use these experts when you're ready to move from insight to action.

Developing Solutions

STRATEGIST



Purpose: Helps set direction and long-term priorities.

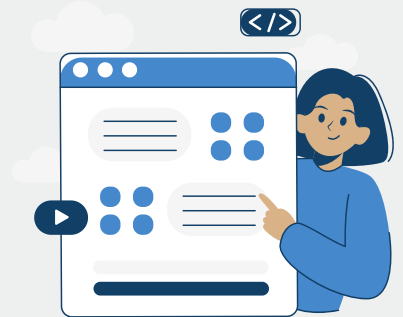
- Clarifies goals, builds plans, and aligns efforts with your mission.
- Often involved in growth or fundraising.

Bring them in when: You're shaping your next chapter or seeking clarity.

DESIGNER

Purpose: Builds programs & initiatives that meet real needs. Ensures your work is impactful, scalable, and community-aligned.

Bring them in when: You're launching or refining a program, process, or service.



FIXER



Purpose: Removes roadblocks and solves practical problems. Pinpoints barriers and applies tailored, mission-driven fixes.

Bring them in when: Something seems stuck or broken, and momentum matters.

These roles help you build capacity and make things work smoothly.

Implementing Change

BUILDER



Purpose: Strengthens the systems behind your mission. Improves operations, finances, HR, and tech infrastructure.

Bring them in when:

Your structure isn't supporting your growth.

INTEGRATOR



Purpose: Aligns people, processes, and priorities. Ensures teams, systems, and strategies work together.

Bring them in when:

Efforts are siloed or execution feels chaotic.

Focus here when your success depends on people + relationships.



Engaging Stakeholders



FACILITATOR

Purpose: Guides inclusive, productive conversations. Helps stakeholders align and take action together.

Bring them in when: You need buy-in, collaboration, or to have tough conversations.

ADVISOR

Purpose: Provides trusted, expert guidance. Supports leaders and boards with strategy, governance, and advocacy.

Bring them in when: You want perspective and support from someone who's been there.



CONNECTOR

Purpose: Opens doors and expands your reach. Builds relationships with funders, government agencies, and other grassroots organizations.

Bring them in when: You need new relationships or want to grow your visibility.



Sometimes the biggest breakthroughs happen from the inside out.

⊕ Other Key Roles

COACH/TRAINER



Purpose: Builds leadership & staff capacity.

- Offers coaching, workshops, and skill-building for individuals or teams.
- Focuses on areas like fundraising, management, DEI, and collaboration.

Bring them in when:

You want to invest in people and strengthen internal capabilities.

FUNDRAISER



Purpose: Secures and grows the resources you need to thrive.

- Develops fundraising strategies, grant approaches, and donor engagement plans.
- Can support specific campaigns or help diversify funding base.

Bring them in when:

You need sustainable funding or you're ready to grow.

WHY GETTING SPECIFIC MATTERS

Get the Right Support, the Right Way

When the problem is too broad, the solution will be too.

The more clearly you define your challenge, the better equipped you'll be to bring in the support that truly moves your mission forward.

This guide is a starting point to help you name what you need and take action with confidence.

Catalyst:Ed partners with nonprofits to:

- Clarify what kind of support is truly needed
- Refine project scope and priorities
- Connect organizations to expert, values-aligned consultants from our network of 900+

Whether you're planning, building, or scaling, we'll make sure you get the **right** kind of help, not just the available kind. Let's explore how we can collaborate on your next project.

**Schedule a Free Call
with Catalyst:Ed**



**You know what kind of support
your organization needs.**

**We'll help you find the right
provider to deliver it.**

[SCHEDULE A DISCOVERY CALL](#)

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Unlock Insights. Access Expert Support. **Drive Deeper Impact.**