

Individual Consultant Application



The Organizational Development and Learning Center has created the Consultant Referral Program as a means of ensuring that Yale managers have access to well-qualified organizational development consultants. The heart of the program is a pool of pre-qualified, external consultants that we believe can help meet the ongoing demand for training and consultation services at Yale University.

This program applies only to organizational development consultants, not consulting firms. If you are interested in training at the OD & Learning Center, please contact our Course Coordinator at 432-5660.

This application is for individual consultants. All questions should be answered in regard to the individual consultant, not the consulting firm (if applicable). Firms with multiple consultants need to have each consultant complete an application and submit the required documents.

Instructions:

- Complete this application about yourself by filling out all items and submitting all the proper attachments.

If the application is incomplete, there will be a delay in processing. Once your status is approved, the information from this application will be available to our clients through your application file, discussions, and the online directory.

Approval Process for the Consultant Referral Program

1. Complete the application and submit to the Yale OD & Learning Center.
2. Application is reviewed to ensure that all information is completed and attached.
3. Your references are contacted and other information verified.
4. A senior member of the Yale OD & Learning Center reviews the application and reference data.
5. Preliminary screening is made by the Yale OD & Learning Center. You will be contacted about our decision.
6. If warranted, you will be scheduled for a 20-30 minute presentation, followed by a brief interview with a senior member(s) of the Yale OD & Learning Center.
7. Final decision is made by the Yale OD & Learning Center. You are contacted by letter about our decision.
8. If approved, information displays on the consultant referral program website within one week of the final decision.

1. Individual Consultant Information:

Name: _____ Title: _____

Address: _____

Phone: _____ Fax: _____

E-mail: _____

Firm Name (if applicable): _____

2. Individual Consulting Rates:

\$_____ Hourly \$_____ Daily

Discounts available? _____ Yes _____ No Please explain: _____

3. Please list 5-10 past and current clients, including those at Yale University (Put an asterisk [*] next to Yale clients.) If a specific Yale department is listed, please include a signed letter of consent from the department stating permission to publish this information on our web site.

4. Please list three references, including organization and phone number. Additionally, please provide details on the type of work that you did for them.

Reference 1

Name: _____ *Title:* _____
Organization/Department: _____ *Phone:* () _____
Details: _____

Reference 2

Name: _____ *Title:* _____
Organization/Department: _____ *Phone:* () _____
Details: _____

Reference 3

Name: _____ *Title:* _____
Organization/Department: _____ *Phone:* () _____
Details: _____

5. Areas of Individual Specialization – To better match client needs with consultant expertise, please indicate your top three (3) specialties in each area of expertise. The information you provide will help clients identify consultants who specialize in an area they are seeking. For instance, if we are looking for a consultant specializing in diversity, a member of the ODLC staff, or our client, will first contact those who have ranked their expertise in category #1, that of a leading expert. We will then introduce candidates who have marked their expertise as extensive and knowledgeable, category #2. The same process will be continued for those individuals who have marked their expertise in category #3, some substantial experience and knowledge.

Instruction: Use the ranking scale below to identify your top three in EACH area of expertise/knowledge.

Ranking Definition

1 (Use with only three topics) ... You are seen as a **LEADING EXPERT** in this area

2 (Use with only three topics) ... You have **EXTENSIVE EXPERIENCE AND KNOWLEDGE** in this area

3 (Use with only three topics) ... You have **SUBSTANTIAL EXPERIENCE AND KNOWLEDGE** in this area

Example:

| | |
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| <u> 2 </u> Team building | <u> 1 </u> Customer Service |
| <u> 3 </u> Coaching and Feedback Systems | <u> 3 </u> Project Management |
| <u> 2 </u> Supervisory Skills | <u> 1 </u> Organizational Management |

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| <u> </u> Career development | <u> </u> Team building |
| <u> </u> Coaching and feedback systems | <u> </u> Review of internal controls |
| <u> </u> Communications | <u> </u> Compliance review |
| <u> </u> Competency modeling | <u> </u> Risk analysis |
| <u> </u> Customer service | <u> </u> Presentations |
| <u> </u> Diversity | <u> </u> Employee involvement |
| <u> </u> Executive coaching | <u> </u> Recognition programs |
| <u> </u> Interpersonal communications | <u> </u> Best practices benchmarking |
| <u> </u> Leadership | <u> </u> Idea programs |
| <u> </u> Organizational assessment | <u> </u> Quality initiatives |
| <u> </u> Performance management | <u> </u> Independent audits |
| <u> </u> Process consultation | <u> </u> Project management |
| <u> </u> Strategic planning | <u> </u> Supervisory skills |
| <u> </u> Other: _____ | |

Please note: *Failure to identify specializations will void your application.*

6. Publications, articles or books you have written:

7. Please include the following with the completed application:

1. Resume or curriculum vitae
2. Professional biography (100 words or less)
3. Any written referrals
4. Any articles or books that you may have written, writing samples
5. Brochures, marketing materials

8. E-mail/fax completed application(s) to:

Organizational Development and Learning Center
Yale University Attn: Consultant Referral Program
221 Whitney Avenue, Suite 104 New Haven, CT
06520-8354

203-432-5660 (Phone)
203-432-6267 (Fax)
learning@yale.edu (email)

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