1. Know the Foundation’s Life-Cycle Stage
   *Use this checklist to identify the stage that best describes your foundation.*

2. Agree Upon the Foundation’s Needs
   *Discuss common consultant engagement points.*

3. Find the Right Fit
   *Identify key consultant attributes.*

4. Establish Clear Goals for the project and for the future

**SKILLS**
- Background and expertise

**EXPERIENCE**
- Prior related work and reference checks

**PERSONALITY**
- Personal and professional style; “chemistry”