



June 2024

Advisory services resource pack for Organisations of Persons with Disabilities (OPDs): Resource 1: Reviewing new advisory opportunities



This resource covers the first step in the process of scoping potential advisory work: decision-making related to possible new opportunities.

Prepared by the Inclusion Advisory Group (IAG) of CBM Global Disability Inclusion, with input from the Pacific Disability Forum.

Introduction

Organisations of persons with disabilities (OPDs), like all organisations, have their own priorities and interests. These are usually determined by board members, staff, and members. When another organisation seeks to work with an OPD, then the OPD needs to work out its own interests and decide whether to proceed.

When deciding whether to take on a particular paid advisory opportunity, there are multiple things to investigate, to think about, and to decide upon. There are no 'right answers': each OPD will need to make its own decisions and work out how to manage the consequences, both positive and negative.

Some questions and criteria are suggested in Tool 1.1 to help OPDs to decide whether to go ahead with a new opportunity. Some organisations call this a "go" or "no go" decision.

The questions in [Tool 1.1](#) are divided into three categories:

- **Strategic questions** – related to whether the OPD thinks this potential work is the 'right thing to do.'



- **Organisational questions** – related to whether the OPD has the organisational strengths, interests, and capacity to do the work.



- **Task-related questions** – related to the nature of the actual task involved, timeframes and which approach might be required to deliver the work.



These questions are provided for guidance. They are not all necessary and each OPD might have different or additional questions to consider.

These or other questions could be turned into criteria by OPDs to enable them to make decisions about whether to proceed with an opportunity. Potentially, OPDs could then score opportunities against the criteria. For example, if an opportunity meets over 50% of the criteria, or scores highly against these criteria, then the OPD may choose to proceed, but if it falls below a set level, then the OPD may decline the opportunity.

Tool 1.1: Appraisal criteria for new advisory opportunities

The questions and criteria below may help OPDs to decide about whether to go ahead with a new advisory opportunity.

Strategic questions:

- Is the opportunity consistent with our core advocacy interests and goals in relation to disability inclusion in this country or region?
- Is the opportunity likely to enable us to achieve our current organisational objectives and priorities?
- Is the opportunity the best way for our OPD to achieve our objectives and priorities?
- Is the topic or subject area of major interest to us, or is it lower on our list of priorities?
- What options are there for us to work with this organisation – for example, in a collaborative partnership, as an unpaid adviser, or under a legal contract where services are provided for a negotiated fee?
- Could we ask the organisation to contribute to our core costs rather than contracting us to do specific work or give specific advice, so that we can work as collaborators rather than consultants?
- How will this opportunity add value to the advisory work of our OPD?
- How will our input and work be acknowledged by the organisation if our advice also contributes to project activities, written reports, research literature, articles, etc?

Organisational questions:

- Is this opportunity aligned with our organisational values and priorities?
- Is our organisation in a good position to take on these additional responsibilities?
- Do we have organisational systems (sound financial management, legal accreditation etc.) to be able to meet contractual requirements?
- Have we worked with this organisation before?
 - If so, how and on what themes have we collaborated with this organisation?
 - If so, did we have good and inclusive working relationships with the people in this organisation?

- If so, what did we learn about the process of advising the organisation?
- If not, what do we know of this organisation, its values and purpose, and its ability to work with OPDs?
- Do we know of other organisations that have worked with this organisation and what lessons can we learn from them to help us with our decision?
- Do we want to work in collaboration with this type of organisation or this particular organisation?
- If we want to work with another OPD or disability-specialist organisation or independent consultant, are we comfortable with the level of trust, the nature of the relationship and the shared values and arrangements?
- Do we have the capacity to undertake all the necessary processes to collaborate with this organisation, such as discussing and designing the terms of reference, maintaining regular communications and coordination, implementing the work to our own standards and those of the contracting organisation?
- Do we feel that we will be able to influence the other organisation, for example shaping the nature of the task and adjusting our role and capacity, or do they seem quite fixed in their ideas?

Task-related questions:

- Is this task of interest or relevance to our organisation and members?
- Is our team interested in undertaking this particular task or providing this advice?
- Do we have knowledge, experience and skills (inside or outside our OPD) that will enable us to undertake this task or provide this advice, successfully?
- Will we have to spend a lot of time (perhaps unpaid time) preparing for, researching and getting additional specific information, to be able to provide advice on this topic?
- Are we available, given our other core responsibilities and commitments, to provide the services requested, in terms of time and effort needed and the expected deadlines?
- Are we clear enough about how we would actually provide the advice (recognising that sometimes a task might not be really clear until after the work begins)?
- Is there another OPD or member in our network that we think/believe is more suitable than us to do this task?
- Is it possible to appoint paid personnel or volunteers to carry out the responsibilities on our organisation's behalf?