OTERO CONSULTING GROUP
Empowering Schools One Mind at a Time

Not All Consultants Are Created Equal

ADAPTATION TO THE NEW NORM

While many institutions continue to successfully adapt through innovation and strategic leadership, others encountered significant challenges, including declining enrollment, operational instability, compliance concerns, and, in some cases, closure.

During this period of uncertainty, educational organizations increasingly turned to consultants for guidance and specialized expertise.

Although qualified consultants can provide substantial value, the growing demand for consulting services has also created opportunities for individuals whose credentials, experience, and expertise may not be easily verified. As a result, educational institutions must exercise greater diligence when selecting consulting partners.

THE CATALYST FOR CHANGE

The educational sector underwent a period of extraordinary transformation during and following the COVID-19 pandemic. Institutions were required to rapidly implement remote learning solutions, adopt innovative technologies, maintain compliance with evolving regulations, and respond to changing student expectations.

To address these challenges, many institutions sought the assistance of external consultants with expertise in accreditation, regulatory compliance, strategic planning, enrollment management, and financial sustainability.

When properly qualified, consultants can bring valuable perspectives and specialized knowledge that support institutional success. However, the effectiveness of consulting services depends largely on the consultant's experience, professional integrity, and demonstrated competency.

CREDENTIAL VERIFICATION

One challenge facing organizations across all industries is the growing prevalence of credential misrepresentation. Numerous studies suggest that resume embellishment and inaccurate representations of professional experience remain common among job applicants and independent

contractors. While most educational institutions employ rigorous screening procedures when hiring full-time personnel, consultants are often engaged through less formal evaluation processes.

This distinction creates additional risk. Because consultants frequently influence strategic decisions affecting compliance, accreditation, finances, and governance, their qualifications should be evaluated with the same level of scrutiny applied to senior executive hires.
Verification should extend beyond academic credentials and include professional experience, documented accomplishments, references, certifications, and evidence of successful project outcomes.

RELEVANT CONSULTING EXPERIENCE

Educational consulting is a specialized profession that requires expertise in institutional operations, accreditation standards, regulatory compliance, fiscal management, governance, strategic planning, and organizational leadership.

Experience alone should not be the sole measure of competence. Institutions must also evaluate the quality, relevance, and scope of that experience.

Consultants who have held senior leadership roles with profit-and-loss responsibility and accountability to governing boards, investors, or executive stakeholders often possess a comprehensive understanding of institutional challenges. Their experience managing operational performance, budgeting, compliance obligations, enrollment strategies, and organizational growth provides valuable insight for real-world consequences of leadership decisions.

Such experience frequently enables consultants to provide practical solutions that balance regulatory requirements with operational effectiveness and financial sustainability. Conversely, consultants lacking sufficient expertise may unintentionally provide recommendations that increase compliance exposure, jeopardize accreditation status, delay institutional initiatives, or contribute to unnecessary financial losses.

In many cases, the cost of correcting poor guidance far exceeds the cost of conducting proper due diligence before engagement.

RISKS ASSOCIATED WITH INADEQUATE CONSULTANT VETTING

As demand for consulting services continues to grow, educational institutions face an increasingly complex marketplace of independent advisors, consulting firms, and subject matter experts.

Postsecondary institutions routinely make high-stakes decisions involving:

- Accreditation and reaccreditation
- State authorization and licensure
- Federal financial aid compliance
- Institutional effectiveness
- Governance and organizational restructuring
- Strategic enrollment management
- Financial planning and sustainability
- Trust should be supported by evidence.

While marketing may communicate competence, institutions should conduct independent verification of credentials, employment history, accomplishments, references, and industry reputation. Errors in any of these areas may result in regulatory sanctions, loss of funding eligibility, accreditation concerns, reputational damage, or institutional closure.

THE NEED FOR GREATER TRANSPARENCY

Transparency is one of the most effective safeguards against unqualified or unethical consulting practices.

Educational institutions should have access to reliable information that enables informed decision-making when evaluating consulting providers. Increased transparency benefits not only institutions but also qualified consultants whose expertise can be independently verified.

Several practices may strengthen accountability within the consulting profession:

- Public verification of educational credentials and professional experience.
- Clear disclosure of consultant status, including whether services are provided independently, through a corporation, or as part of an institution-affiliated organization.
- Transparency regarding professional affiliations and potential conflicts of interest.
- Publication of relevant certifications, licenses, and professional memberships.
- Evidence of professional liability insurance and established business operations.

- Demonstrated staffing capacity and organizational infrastructure to support client needs.
- Multilingual capabilities when serving diverse educational communities.

These measures allow institutions to make informed decisions and differentiate between consultants with proven expertise and those whose qualifications may be difficult to substantiate.

UNDERSTANDING THE BUSINESS OF EDUCATION

Institutions should evaluate whether prospective consultants possess practical experience in the broader business of education, including fiscal management, enrollment growth, organizational development, operational efficiency, and long-term sustainability.

Due diligence should help determine whether a consultant has the experience, resources, staffing capacity, and strategic expertise necessary to support organizational growth. While many professionals possess strong academic or administrative backgrounds, fewer have demonstrated experience managing the financial realities of educational operations. Institutions often benefit most from advisors who can help transform organizational challenges into sustainable opportunities through proven business strategies.

IN CONCLUSION

As the Education Compliance industry continues to become more complex and diverse, institutions must place greater emphasis on comprehensive due diligence and credential verification before engaging external advisors.

About the Author

Dr. Jose Otero is the President of **Otero Consulting Group®**, a Florida-based education regulatory compliance, accreditation, and licensure consulting firm. With his worldwide experience spanning more than 30 years in the education sector, he has worked extensively with colleges, universities, medical and nursing institutions, technical schools, and professional training organizations. His expertise includes regulatory compliance, institutional licensure, accreditation, strategic planning, special projects and innovative operational development.