

Working with Consultants – a good practice guide

What is this guide about?

This guide has been produced to help community and voluntary organisations considering the employment of a consultant. It has been written based on experience on both sides of the fence—as a senior officer in local government responsible for running numerous consultancy contracts and now as a self employed consultant. The guide is not intended to deal with employment of builders or similar contractors.

Preliminaries

1. What is the project?
 - a. Set out clear objectives
 - b. Define the limits of the project – what is covered and what isn't
 - c. Define your requirements for recommendations
 - d. Give explicit consideration to how you will use the recommendations within the organisation
2. Why are you considering use of consultants?
 - a. Common reasons include:
 - i. Lack of in-house skills
 - ii. Lack of staff resources
 - iii. Lack of time
 - iv. Need to validate work already carried out
 - b. Consider explicitly the in house capacity to deliver all or part of the work before taking a decision to employ outside consultants. Make sure all your reasoning is set out clearly in the context of the probable cost of a consultancy.
 - c. Consider your own costs
 - i. Project management
 - ii. Staff time
 - iii. Steering group
 - d. Can the consultancy be used to extend or add to in house skills?
 - e. Establish and agree a budget for the project—including your own staff/resource costs

Project Brief

3. Typically a project brief should include:
 - a. Background details about the organisation
 - b. The context for the project
 - c. Project objectives
 - d. Proposed project timetable—make it clear if this is open for amendment
 - e. Proposed budget/costings—it is in your own interests to tell consultants roughly how much money you have available
 - f. Specification of reporting arrangements—who, when and how

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- g. Details of any source documents available for inspection—consider carefully how much information consultants will need to prepare a tender that meets your requirements. If they have to gather it afterwards it could be you paying!
- h. Contact details for the project
- i. Any other requirements based on your own policies and practices.

Identification of consultants

- 4. Talk to other organisations in the same field as you. They may have had similar consultancy projects.
- 5. Is there a national body for your organisation from which you can get advice?
- 6. Is there a national body representing consultants in this area of work?
- 7. Consider talking to likely consultants to refine the brief before it is formally circulated, not to get them to write the brief for you but to test out your ideas on the scope and nature of the work. Don't expect to spend hours on the phone though!

Selection of consultants

- 8. Having identified a number of consultants you need to consider the selection process.
 - a. Are you going to interview them or rely on written submissions
 - b. Are you going to have as two stage or a single stage process?
 - i. Two stage process involves production of a long list of consultants who would be asked to make preliminary submissions. From these a short list would be produced who would either work them up in more detail (common in architectural and development projects) and/or present them to you before the final decision is taken.
 - ii. Single stage process is just that—fully detailed submissions are made and the selection is made either on that basis or more commonly at an interview.
 - c. Points to consider
 - i. Don't ask dozens of consultants to make submissions unless they are going to be **very** brief. Preparing submissions costs time and money that has to be paid for as an overhead. Too much time making excessively detailed submissions means consultancy rates go up—not something you want to see! It is reasonable to ask for an expression of interest and some information on past experience in the project area.
 - ii. If the project will involve close working with your own staff, it is probably advisable to meet the consultants and not rely on written submissions.
 - iii. If you interview **make sure the people you meet are those who would be doing the work.**
 - d. Specify the basis on which the tenders are sought—fixed price or daily rate. Fixed price is common. Even with a fixed price tender information on daily rates may be requested if the content of the project could vary after appointment.

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