



Guide to choosing consultants

Guide to choosing consultants

Further copies available from:

Email	general.enquiries@biglotteryfund.org.uk
Phone	0845 4 10 20 30
Textphone	0845 6 02 16 59 (this is for those with a hearing impairment)
Our website	www.biglotteryfund.org.uk

Accessibility

Please contact us to discuss any specific communication needs you may have.

Our equality principles

Promoting accessibility; valuing cultural diversity; promoting participation; promoting equality of opportunity; promoting inclusive communities; reducing disadvantage and exclusion. Please visit our website for more information.

We care about the environment

The Big Lottery Fund is working towards sustainable development and the use of sustainable resources.

Our mission

We are committed to bringing real improvements to communities and the lives of people most in need.

Our values

We have identified three values that underpin our work: making best use of Lottery money, using knowledge and evidence and being supportive and helpful.

You can find out more about us, our values and the funding programmes we run by visiting our website www.biglotteryfund.org.uk

The Big Lottery Fund is committed to valuing diversity and promoting equality of opportunity, both as a grantmaker and employer. The Big Lottery Fund will aim to adopt an inclusive approach to ensure grant applicants and recipients, stakeholders, job applicants and employees are treated fairly.

© Big Lottery Fund, December 2011

The Big Lottery Fund regularly makes grants that allow organisations to hire consultants to complete work that is beyond the capacity of their current resources and/or the scope of their expertise. This guide provides basic information to help you choose, appropriately brief and make best use of consultants.

Project Brief

It is important that you prepare a clear and concise brief which provides the necessary details of the project to ensure that you get the right person for the job and the job done properly. The brief should clearly set out objectives, project scope, timescales, constraints, cost and reporting procedure.

Objectives

Provide the consultant with a clear description of what it is you are trying to achieve. Clearly state the objectives of your overall project and the objectives of the piece of work you want done, and be clear about how you expect your organisation to benefit from this work. The project objectives for this piece of work should be SMART – Specific, Measurable, Achievable, Realistic and Timebound. For example, “We want to better understand the needs of young people in our area so that we can design a new project to help them feel more confident about their futures.”

Scope

Outline the work you want done and what you expect the consultant to produce for you (outputs). It could be a project that is focused on a particular geographical area, beneficiary group or looking into specific revenue streams, or focused on a particular timeframe. For example, “The feasibility study will provide a business plan which will outline what the group aims to deliver, including training for volunteers and education opportunities for local schools, as well as needs for a growing site and the operation and sustainability of the community garden. The study will also identify and assess the suitability of potential sites in the area.”

Constraints

Provide details of any constraints within which the project must operate, for example there may be constraints on the amount of resources available to the project or the location of the project team. The boundaries within which the project will eventually be delivered must be clearly laid out in the consultant’s brief. For example, “The consultant will be required to identify at least two suitable sites for our drop-in sessions. The sites will have to be accessible by public transport for beneficiaries in the town and surrounding villages, and be accessible for disabled people and the infirm.”

Timescales

Clearly state the expected timescales of the project, including details of when you want work to start and finish and provisional dates for submitting interim and/or final reports.

Cost

It is useful to give some indication of budget for the project and how and when you would like to pay for the work carried out. Talk to support organisations, such as your local interface, to get an understanding of likely costs if you are unsure.

Reporting Procedure

Outline the reporting procedure for the project the consultant is delivering, including how many reports/presentations you would like and when you want them delivered, what format you would like the reports/presentations to be in and what you want them to contain. As a guide you should ask for an update on a monthly basis, dependent on the length of time you expect the consultant’s work to last. The most important thing is knowing what you want to learn from the work and why. For example, if you are hiring a consultant to help you secure funding or win a contract, then it is imperative that you know what the funder or client will need and that you match this to what you are asking the consultant to do.

Once the Project Brief is completed, it is a good time to ask “Do we really need a consultant, or can we do it ourselves or with other help that is available through the public, voluntary and community sector?” It is also worth checking that no-one has already carried out this or a similar piece of work. The SCVO’s Evidence Library and the Third Sector Research Centre’s Knowledge Portal (launching October 2011) are useful resources on issues concerning the Voluntary and Community Sector.

Choosing a Consultant

If you cannot complete the project using the skills and expertise of your own organisation or the support that is available from outside sources, then it may be appropriate to use the services of a consultant. Finding and choosing the right consultant for your project is the next step.

There are many different ways for you to identify consultants. You can ask people from similar organisations if they would recommend anyone. You can also openly tender for proposals through your own website and other local channels, trade press (e.g. Third Force News), procurement sites (e.g. www.tendermatch.co.uk) or relevant VCS websites (e.g. procurement pages of local interface organisation), depending on the tender.

You can then set out specific selection criteria to help you make your decision or you can invite proposals from specific consultants. If necessary, you can also shortlist the proposals and interview consultants.

It is important to talk to more than one consultant, and we recommend that you receive at least three quotes for the piece of work. However, remember that the cheapest quote will not necessarily provide the best quality of work and the costs of your preferred consultant may be negotiable. In addition to cost effectiveness, the consultant should demonstrate that they understand the brief, possess the skills you require and can deliver the end product within a realistic timescale.

We recommend that you check references for the preferred consultants, including an example of similar work they have carried out. Key things to look out for are:

- ▶ Did they honour the terms of the contract?
- ▶ Did they deliver on time and within budget?
- ▶ Were the end products useful?
- ▶ Was there a good relationship between the consultant and the client?

It is a good idea to meet the consultant in person and brief them well. This will give you an opportunity to go through the chosen proposal before making a final decision. Do not feel pressured into accepting the proposal if you have any concerns about it or if you do not feel that you or your colleagues could work well with the consultant you are meeting.

If you have a limited choice of consultants because of where you are based, or because of the nature of the work you need done, it is important that you follow an open process for recruiting consultants. It will allow you to demonstrate that you have acted fairly and ensure you get the best value for money. Remember that most consultants will travel as part of their work, and there are options for you to incorporate expenses into the project budget to ensure that you get the most appropriate and effective person for the job.

Agreeing Written Contract

Once you have made a final decision, it is important to review and agree a written contract before the project starts. The contract should clearly state who is responsible for what and reduce the risk of any surprises. Standard contracts are available online and can be adapted to suit your own situation, or you can hire a lawyer to draw up the contract. You can also contact your local interface organisation for further advice.

Below is a list of some of the basic items that the contract should include.

- ▶ Names and responsibilities of the client and consultant
- ▶ Fees and other payment schedules
- ▶ Other costs (including out of pocket expenses)
- ▶ Deadlines
- ▶ Details of what the consultant is expected to deliver
- ▶ Ownership of what is produced
- ▶ Details of who should receive the consultant's report or other material
- ▶ Confidentiality agreement
- ▶ If it is acceptable for the consultant to sub-contract

Paying the Consultant

There are many different ways in which you can pay consultants including hourly fees, daily rates, fixed price or lump sum, fixed price for fees with limit for expenses or the retainer method. It is important to agree in advance when and how payments will be made and to put appropriate systems in place internally to meet the agreed payment schedule, including how you will assure yourselves that the work delivered is of the expected standard.

Managing Consultants

Remember to keep in touch with the progress of the project and ensure that the consultant is sticking to the agreed programme.

To avoid any surprises in the consultant's final report, ask for a draft report and make sure that it is in a format which is beneficial to you and is written in a way that you and your staff can understand and use.

If you are unhappy with the work once completed, you should address this with the consultant as soon as possible. If the matter is not resolved, you can take legal action if you have a written contract that has not been fulfilled, and you should seek legal advice on how to proceed with this.

If you are happy with the final product, you should provide the consultant with positive feedback about how their work met your needs. The best consultants will be interested in following your progress and learning what you did as a result of their work. You can also end your contractual relationship on a positive note by offering to provide a reference for the consultant to use in future tender bids.