



# Briefing a Consultant for the Terrified

## A brief guide to getting the best from a consultant

### Introduction

If you have never used a consultant before, the chances are you don't know where to start and are terrified at the prospect of engaging a professional without knowing how to go about it. The good news is that you are not alone. "How do I brief a consultant? It is one of the most frequently asked questions by Forth Sector Development clients. We have compiled the following guide to help you through the process. It doesn't aim to be the definitive guide for every organisation and you will have to adapt it to suit your own circumstances, but hopefully it will start by ring a few bells in the right places.

### Before You Start – What do you need?



Why do you need a consultant? Because

- a) You want an objective/expert opinion
- b) You don't really know, and you're hoping a consultant will wave a magic wand
- c) Your organisation doesn't have the time/resources/expertise to do the work



What do you want the consultant to do?

Be clear about what you do want them to do and just as clear about what you don't want them to do.



Who will the report be aimed at? The Board, management, funding bodies? How will it be used and where do you want it to take the organisation?



Why do you think using a consultant will improve the quality of the work you are doing? What in-house resources do you have and what expert input do you need that you do not have in-house?



How much preparation work do you need to do? A good consultant will work with you not for you and the more work you do yourself, the better equipped you will be to work with the consultant.



How will you know if the consultant has produced a worthwhile piece of work? What outcomes are you hoping to achieve and what will the indicators be that will tell you if this has happened?

- a) Action points
- b) A report
- c) An evaluation
- d) Another measurement tool that you have devised yourself

## ***Writing a clear brief***

The consultant's brief will be a working document. This should guide them in the process of producing something that is meaningful and useful to you, not just a report that you either don't understand, or is so vague that it doesn't really get you any further. A vague brief will produce a vague outcome, so be clear about what you want to get the best results.

Include everything that has some bearing on the nature of your proposed venture, even if it appears to be minor or trivial. Be precise about what you want. If you need premises for instance, be clear about your needs; location, facilities such as disabled access, cost breakdown. There is no point looking at schedules for city centre premises with lots of hidden extra charges if you have a tiny budget.

Don't be afraid to change the brief as you go through the process of selection, but be aware that unless you propose a process for review, you will be bound by the brief once you have chosen your consultant and the contract has been drawn up and signed.

### **Things to Include in the Brief**



Description of your organisation; purpose, motivation, values, size, structure, finances



Personnel



Authority, reporting and reviewing



Executive summary of the venture



Consultancy objective; need, problem or opportunity or reason you need consultancy



An indication of the format and deadline for proposals, tenders or expressions of interest. Remember to ask

- what is their understanding of the brief?
- How they would approach the work
- References
- Timescales
- contact details
- payment terms, VAT, insurances etc



What you want them to do and role you want them to perform, facilitator, coach, mentor, implementation support)



Special competencies ie market or sector specialism



Budget and finance implications; ie VAT included, is it a fixed price tender?



Timescales, milestones, start and finish dates



Evaluation, follow up and signing off (prior to paying fees)

## What to do next

Don't send your brief out to every name you come across. Do some homework and find out which consultants are familiar with the subject, sector or complexities of the job you want them to do. Do this by checking their past client list and type of work they specialise in.

Once the deadline for tenders has passed, draw up a short list of the consultants you would like to talk to. Decide upon the process and form this will take and collect all the documentation you will require for a meeting. This should include some sort of scoring system so that you can compare like with like after the meetings. Most of all you need to be comfortable with the person you will be working with, so find out who that will be. It may not necessarily be the same person that presents the tender proposal. Just as important, you must nominate someone within your own organisation to take the lead on the project. They will need to be fully involved from the beginning.

Agreeing the terms of reference and drawing up the contract sounds quite complicated, but attention to detail at this stage will pay dividends later on if there are any issues or concerns regarding the consultant's work. The terms of reference can be drawn from the agreed brief and should include all terms and conditions for the work. If this is going to be a large piece of work you may wish to consult your lawyer or legal team to help smooth the negotiation process.

It is probably worth asking for fixed price tenders unless there are specific circumstances that make that difficult. If that is the case, ask for maximum prices, broken down into different stages. That way, if the costs start to escalate, you can at least cap costs and possibly re-negotiate later stages to reduce costs. You may prefer to state from the outset that you have a set budget for a piece of work. This will normally produce competitive tenders that are similar in costs, but it may mean that you get a tender that maximizes the work to fit the budget. You should be able to spot the ones that are padded and offer less value for money and it is something to bear in mind when selecting a short list.

## Things to include in the contract

This is a starting point. The following are only suggestions of points you might wish to include in the consultant's contract. This is not an exhaustive list and there may be things on the list that you feel don't apply to your own organisation.



Your organisation's full contact details, including the key contact



Purpose of the contract, including terms of reference; setting down clear Guidelines for the scope of the work, milestones, outcomes, deadlines and reporting mechanisms, specification of who will be doing the work, methodology and system for changes to the team.



Starting date and duration of the contract, termination agreement in case of a breach of contract on either side.



Fees, VAT, expenses such as travel, subsistence and incurred costs



Invoicing and payment terms



Confidentiality clause



Intellectual ownership and policy on intellectual property rights



Publication, editing rights, copyright, press embargo



Restrictions ie working for similar organisations engaged on similar projects within a given geographical area



Other conditions



Signed and dated by both parties

## ***Consultants are not mind readers!***

If you are employing a consultant because you haven't a clue where to start and hope that they will conjure up something that will solve all your problems, think again. A good consultant will work *with* you, not *for* you. They will question you on every aspect of your venture and take into account what you have said, but a good consultant will not just tell you what you want to hear. Equally, telling them what to do and dictating the outcome rather defeats the object of employing a consultant.



Allow the consultant to work with your organisation so that they can take advantage of the skills and expertise rather than reinvent the wheel.



Remember to ask for implementation support. There is no point having a glossy report if you don't know how to implement it. Build it into the brief as an objective.



Stay in regular contact but don't waste each other's time by having lots of meetings. Build in reporting points so that time can be maximised by both parties.



A consultant might not tell you what you want to hear. LISTEN to the devil's advocate and then be prepared to take an objective view. Arrange a joint review to go over the conclusions with the consultant.



You may still not agree with the consultant and decide to go ahead. Remember though, that your decision must be based on what is right for your organisation and not on a personal ego trip or dogged determination to exert your will come what may!