



Working with Consultants

This Advice Note is designed to help you know when to use consultants and what they do as well as how to choose and commission a consultant. It also offers some basic advice about how to work with them.

Consultants may form an important role in providing expert knowledge for a project that you wish to pursue, but they should be used carefully, not allowed to take over the project, and should work within clear agreements, with clear understanding of their roles. Most importantly, the organising committee should continue to make decisions and take responsibility for the project. Consultants should therefore work with the organising committee, and defer to their guidance and wishes on all matters whilst inputting the specific expertise for which they have been appointed.

Why consultants?

For most voluntary organisations, committee members and their contacts in the community can gather much of the information required for developing a project, at little cost.

However, some work may have to be commissioned for a fee. Consultant expertise is usually commissioned where the management committee has recognised that it does not have the technical experience, or sometimes the time, to provide the detailed information that many projects require.

One of the first things you should consider is whether or not you need consultant input, and where it would be best used.

Beware of the following:

- Many community groups feel that they have to get a consultant in, so that their plans can be presented in a way that will guarantee funding. Using a consultant is not a guarantee. They can help, but only if **properly briefed and managed**.
- Usually, the management committee will have a much greater knowledge and understanding of their community and how it works than a consultant and, given time and systematic planning, they can present their case in a strong and convincing way.

- Managing a consultant takes time.
- Consultants cannot take decisions for you. They merely advise. The decisions are still up to you and you must take responsibility for them. Even if in the end you decide that you cannot handle a particular project, going through the process of deciding what areas of work you need help with will help you identify exactly what skills, expertise and attitudes you are looking for in a consultant.
- Before you get a consultant to do anything, think about how much of the project you could do yourselves.

What do consultants do?

Consultants are usually brought in to work up a feasibility study or business plan, or to provide specific technical or design information required to receive building regulations, planning permission etc.

You can commission either one consultant who is capable of looking at all the various aspects (or sub-contracting to other consultants) or you can take on and manage a variety of consultants, depending on the type and level of information you require.

Types of Consultants might include:

- Architects
- Accountants
- Economic Consultants
- Surveyors – Land and Quantity
- Solicitors
- Landscape Architects
- Sports Surface Consultants
- Designers and Interpretative Consultants
- Market Researchers
- Planning Consultants
- Acoustic Engineers and other Technical Consultants
- Etc. etc. etc.

What's the difference between a feasibility study and a business plan?

Feasibility Studies

- A Feasibility Study tests whether or not a plan or project is feasible, or possible. The usual criteria for testing this are:
- The organisational and managerial capacity of those proposing the project.



- The financial and time resources of the project.
 - The demand and support for the project.
- If the feasibility study is positive, a lot of the information that is collected for it can be used to write a business plan.

Business Plans

A business plan is a clear account of the developments you will undertake over a period of time, usually 3 years. Business plans are a combination of the ideas you have and the costs of making them happen. Your plan says:

- What you will do.
- When you will do it.
- Where the money will come from.
- When and how the money will be spent .

Writing a brief to commission a consultant

It cannot be overestimated how important it is to have a clear and concise brief.

If you are considering taking on a consultant of any kind you need to draw up a clear brief, or instruction, of exactly what it is you want them to do. Without a brief, both parties may be confused about what is expected of them, and it will be unclear what monetary value should be placed on a contract for services.

It is usual to identify a number of consultants and send a copy of your project brief to each. Five is a sensible number to contact, but you should contact at least three. You can then go on to interview a short list of those consultants whose response was most appropriate to your needs.

Your Project Brief should contain:

- A background statement about the project.
- A broad description of what is required and the problems that need consultant input, for example, a feasibility study, a business plan, technical drawings, design drawings etc.
- Specific details of what should be contained within the work, for example:

For a Feasibility Study you might want to include:

- an assessment of demand including community consultation, target markets and marketing strategy.

- assessment of funding sources, physical development costs, site development, building and equipment costs and other start up costs.
- projections of annual revenues, projections of annual costs, suggested management and administration structures etc.

For a Business Plan, you may include:

- a SWOT (strengths, weaknesses, opportunities and threats) analysis, demand analysis and marketing strategy.
- implications for the organisation of any proposed changes or new developments.
- income and expenditure projections and cash flows;
- information on pricing and how the pricing structure is to be reached; and an action plan with dates and timing for short, medium and long term plans.
- For architectural drawings or quantity surveyor's cost analysis, you should give details of the stage to which you would like the drawings or costings prepared. Insert the welsh association of Architects details has a standard list of different stages to which a building project can be developed. Depending how much detail you need, the architect can quote for work up to and including a specific stage. This might be outline drawings, up to planning permission or full technical specification ready for sending out for building tenders.
- Ask the consultants how they would propose to do the work. Would they, for example, undertake a process of consultation, and if so, with whom? How much desk research work would they propose?
- Details of to whom the report's authors will be reporting – who is the main contact for the consultancy.
- Details of how much involvement in the process the management committee or organisation will have, and in which areas.
- Details of information already available, either from the organisation's own records or elsewhere;
- A request for references from organisations or projects similar to your own.
- Copies of CVs of the people who will be working on the project.
- Maximum budget including or excluding VAT ;
- Time-scale by which the work will have to be finished –



including dates for draft or interim reports, as well as the final document.

- Date by which proposals should be returned to you;
- Details of what format you would like the final report to be in e.g. three bound copies of the report and one copy unbound etc. Media format of reports, hard copies, disk, web-based or a combination of these.

Choosing your consultant

You can find out names and addresses of potential consultants or consultants from Chambers of Commerce, your Bank Manager, Local Enterprise Companies, relevant County Council Service departments and other funders, Architect and surveyors details. Another good source is to ask organisations similar to yours that you know have used consultants in the past.

It is wise to contact a number of consultants so that you can compare service levels and charges. If you are getting funding support to take on a consultant, it is likely the funder will request that you get a number of competitive quotes.

Factors for choosing your consultant

To draw up a shortlist of possible consultants you should consider the following factors:

- What is their experience and track record?
- Do they have the right approach and attitude to the type of work you do?
- Do you think they would be flexible enough for your needs – for example, if you are only able to have committee meetings in the evenings, would they be willing to attend?
- Are they available within your time scale?
- What do they usually charge – is that value for money to your organisation?
- Do they have sufficient resources to do the job?
- Would regular access to them be easy?
- Do you think you would get on with them and be able to work with them?

You may want to contact them beforehand to get some background information on their company to find out their specialist area of work, their relevant experience, and the resources and expertise they have to hand.

Appraising the proposals

Having sent out your project brief, you should have received a number of proposals from the consultants you have chosen. When looking through them you should ask yourself the following questions:

- What approach are the consultants taking? Does it meet with the way your organisation works and your current needs?
- What are the various skills/expertise of the consultants? Do they meet with your needs?
- Who will be doing the work? If you know a particular individual in a firm and would be happy to work with them, make sure it is their name that is being given as the lead consultant.
- Is the time-scale realistic for the work they are proposing? They may list a variety of things they would be expecting from your management committee; think about whether you can work to that time-scale.
- Is the cost realistic and value for money?
- Check the consultant's references
Always check the consultant's references. An easy way of doing this is to ask organisations that the consultants have done work for in the past. Ask what the consultants actually did, what were the results, did they stick to the budget, and did the organisation get on with them. Most organisations are happy to give references, and they are often the best source of information on value for money. Cheapest does not always equate with value for money!

Interviewing Consultants

If you decide to interview the various consultants who have sent in proposals, apart from specific questions related to the work to be done, you might also want to ask the following questions:

- What is their experience with organisations such as yours?
- What are the main opportunities and problems of working with an organisation such as yours, and how would they propose to tackle them?
- How much time and input would they be expecting from the management committee?

Making Your Choice

- Which of the consultants meet the brief?
- Which of the consultants do you trust and have



confidence in?

- Which consultant do you think you will get on with best?
- Which consultant is the clearest about what you want to do?
- Which consultant has the resources to do the work within the required time-scale?
- Which consultant do you feel has the best approach for your organisation?

You should also weigh the costs and benefits of the proposals and consider:

- Which proposal represents value for money?
- Are the fee rates negotiable?
- Will any one particular consultant give greater credibility to the work you need doing?

At the end of the day you must go for the consultant who you feel will give you exactly what you need. However, for some projects, particularly if they are very high profile, being associated with a well known consultancy can add credibility to your project. However, NEVER choose a consultant only on the basis of their reputation or well-known name. If they don't provide you with what you want or need, it will be a huge waste of your time and money and may jeopardise the project.

Agreeing the Contract

A clear contract between yourselves and the consultant is essential to avoid misunderstanding and to provide a firm basis for dealing with any disagreements.

The contract should state:

- Exactly what is to be done.
- How long it will take and key stages.
- Fees – precisely what is included in them and what the schedule of payments will be.
- Responsibility for and definition of expenses.
- How the work will be controlled and monitored.
- Criteria for evaluating results.
- Basis on which the agreement can be terminated.
- How the final report is to be presented and received.

Basic Rules for Engaging Any Consultant Services

- Be very clear about what you are expecting from your consultant and what your consultant should expect from you.

- Agree everything with your consultant before work is started – in writing.
- Agree when regular reviews of the work will take place, and stick to them.
- If you don't understand a piece of terminology your consultant is using, ask. This is particularly true with technical consultants such as architects and quantity surveyors who have a whole range of terminology that they use without thinking about it.
- Don't forget you are the client, but it is your project they are working on. This means that you need to stay connected with the work and not think that you have handed it all over to the consultant and will get back exactly what you want. Anyone working unsupervised is likely to come back with something you're not expecting.
- Make sure everyone in your organisation knows that the consultancy is happening and the nature and time-scale of the work that is to be done.
- Keep in regular contact with the consultant as the work is being done and have regular feedback sessions with them.

Contacts

There is a collection of detailed factsheets on the **Carmarthenshire Association of Volunteers (CAVS)**

www.cavs.org.uk

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Disclaimer

This Advice Note has been produced on behalf of the Carmarthenshire Community Toolkit to assist community groups to make funding applications. However, it should not be taken as a definitive guide covering all areas of concern and it is recommended that further advice is sought in appropriate circumstances.