



# Management Support Unit (MSU)



## Information Sheet 9: Selecting a consultant

### Starting Out

When you have made the decision to employ a consultant for a specific project it is recommended that you start out by defining the project, taking into consideration its purpose, the tasks to be carried out, the expected outcomes and the allocated budget. This will assist you define the role of the consultant.

Once this is done, develop a project brief for distribution to potential consultants. Distribute the brief as widely as possible.

### You can then shortlist consultants based on:

1. Their qualifications
2. Their experience
3. Their track record including reference checks with past clients, preferably speaking with the past client personally.

It is recommended that you interview the short-listed candidates, as you would a prospective staff member, including checking references.

### After selection

When you have selected the consultant, remember that you are entering into a written contract<sup>1</sup>. It is suggested that in the client/consultant contract you include:

1. The terms of reference
2. The consultants fee and how it is to be paid
3. A timeline that includes specific tasks, when project reviews will be held, and the expected date of completion.
4. Reasons for amendment or termination of the project
5. Copyright, title, ownership of material and intellectual property rights
6. Confidentiality agreements
7. and professional liability

### When the contract is signed, it is recommended you:

1. Inform the relevant parts of your organisation that a consultant has been contracted
2. Provide the consultant with access to the people, information, resources and materials needed for the project
3. Appoint a managing person or committee to oversee the project and provide direction.

**Remember, the best results will come from a good working relationship between the client and the consultant.**

(Source: Institute of Management Consultants)

<sup>1</sup> A valid contract involves an intention to enter a contract, an offer and acceptance of contract terms, consideration of the contract terms, a legal capacity to enter a contract, no illegal conduct, a genuine consent by both parties to enter the contract.