

# How to Select a Consultant

**S**electing the right consultant for your project is an important process: it's in your best interest to be thorough. You need to find the person who best suits your needs. The following tips can help guide you through the process:

## Understand the role of the consultant

A consultant is an advisor, not a miracle worker; if a consultant's promises seem unrealistic, they probably are. Consultants do not have all the answers—but they should know where to find them; you want a consultant who is knowledgeable in the subject area and can offer a workable solution not just a quick-fix.

## Identify your needs

Before you initiate the selection process, determine what you want to accomplish from the project and develop a Request For Proposal (RFP) reflecting those objectives.

An RFP is a document outlining the project and it is used to solicit proposals from prospective consultants. Your RFP will summarize the purpose and scope of your project, and propose terms and conditions of the agreement to deliver specified services. It may also outline the criteria upon which you will base your selection decision.

Be specific in the RFP: create a clear picture of what you, and your consultant, need to accomplish to realize project goals. Once the RFP is finalized, release it for bids and set a realistic deadline for submissions. Send the RFP to a minimum of three consultants.

## Establish the project budget upfront

Once you've secured financing for the project, a project budget must be developed and approved by funding partners. When determining the amount of money to allocate to the project, you need to consider the scope of the project and the details required to meet your project goals. You may wish to include this figure in the RFP; this way, prospective consultant(s) will have a better idea of the scope of the project, and will not propose services you cannot afford. Remember: you have to factor taxes, such as HST, into the total budget amount. This may not be reflected in a consultant's final bid, however, will be added to all invoices you receive from a consultant.

## Selection process

Once the submission deadline has passed, you'll need to evaluate the proposals and select a consultant. Form a representatives' committee comprised of stakeholders possessing the knowledge to evaluate these submissions. Using the predetermined criteria, score each project proposal independently, and then compare the final scores. How you use these scores is up to you and the proposal that scores the highest may not necessarily be the consultant that best fits your needs. Develop a short list of two to four consultants whom you'd like to interview. Questions to ask include: What is your experience in this area? Have you worked on projects similar to mine? As you evaluate a consultant's experience and skills, consider the possible working relationship. Do you like and trust the person? Do you have a good rapport with them? You must be comfortable with the consultant you choose to hire, and confident they will provide you with a high quality, realistic report and recommendations (versus a regurgitation of the RFP.)

## Check references

It's extremely important that you ask for at least three recent references, and that you contact those references. You want to know: if the consultant accomplished what was promised; if they communicated regularly; if the company would hire them again. Contact, as well, representatives from past projects; these people may not be listed as references but you can use them to gather additional information and insights.

## Put it in writing

Prepare an agreement or contract that clearly spells out the terms of your arrangement. It should define the work to be completed, the starting and ending dates (if possible), the fee and how it will be paid, expenses and how they will be paid, and what you (the organization hiring the consultant) will provide. Ensure all relevant parties have signed this agreement before project work proceeds. Finally, for a listing of consultants specializing in tourism related fields, check the related resource listings included in your Tourism Destination Areas kit.