

Guidelines for Choosing a Consultant

It is important to make a careful selection when hiring your consultant. Ensuring that you find someone who has both the skill set and the working style that fit your requirements will be important to your project's success. While the selection process is an individual matter for each organization, the following checklist is offered as a general guide to choosing a consultant. Keep in mind that the purpose of engaging a consultant is to help your organization access expertise, obtain resources, and to work with you in arriving at solutions. It is a collaborative relationship that requires compatibility on both a professional and a personal level.

Have you:

- defined as clearly as possible the organization's needs and the project purpose? (Assessment can be tricky. As organizations work with consultants, they sometimes discover that other undiagnosed issues become priorities for action.);
- identified your selection criteria (i.e. the skills, experience, and background required for the work)?;
- defined the role you wish the consultant to play (i.e. facilitator, resource person, teacher, communicator, adviser, "expert", etc.)?
- identified the style and orientation that you prefer (i.e. task oriented, process oriented, formal, informal, participatory, etc.)?
- asked other community organizations for names of consultants they may have used for a similar purpose?
- invited 3 – 5 consultants to submit a proposal by a specific date?
- reviewed each proposal against your selection criteria?
- interviewed the preferred candidates?
- considered the "fit" with your organization – the people and the culture?
- requested copies of other reports or documents the consultant has worked on in the past?
- done reference checks on interviewed candidates?
- once a decision has been made, has a written agreement been drawn up with the consultant (summarizing the work to be done, goals, expectations, process, desired outcomes, timeline, and payment details)?

Please note that, if you need some assistance in identifying appropriate consultants for your organizational development project, contact the Centre for Sustainability. They will be able to refer you to other organizations that have done work similar to your own, for a consultant recommendation and reference.