

Advice from the Trenches...

Why and How to Hire a Consultant

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With technologies evolving so quickly, the days of government offices being self sufficient are quickly fading. There are more and more situations where small governments should hire consultants to assist with or complete projects that incorporate technologies or new ideas into their workflows. I say “should” instead of “need to” because many areas are still reluctant to hire consultants and they often suffer the long term consequences of their actions. I believe there are two main reasons for that reluctance. The first being that many are in the mindset that hiring a consultant can be seen as a sign that they are not qualified to do their job, and the second being lack of funding; either the lack of money, or the fear of being taken advantage of. The ironic thing is that if you manage a government office and don’t ever hire a consultant, you are probably not doing your job as well as you could be, because you are either not attempting to advance/modernize your office or you are wasting money putting band-aids on existing problems that a consultant (who specializes in your problem area) could solve much more efficiently.

The reality is that government staff is not expected to and shouldn’t try to specialize in everything. Knowing the details about the newest and best technical solutions to everything is an impossible task, so if you want to use the best solutions, a consultant is the way to go. As a supervisor, you have a job to do and that is to manage your department and keep the workflows efficient while enabling people to get information quickly and easily. Task delegation and the ability to recognize when you or your staff legitimately need outside assistance is just part of successful management.

Do we really need a consultant?

So, the first step when considering how to complete a project is to decide whether to hire a consultant and what level of consultation you need with the staff that you have. A good rule is to never say, “oh, we don’t need to hire a CONSULTANT, we have Jim/Jane and he/she can figure that out, how hard can it be?” The answer that I would like to stress is – MUCH MORE DIFFICULT THAN YOU THINK.

There are reasons that consultants choose to provide certain services. One of the main reasons is that they have seen a need for the specialized services due to their experience in the field. Many times they have encountered negative situations resulting from project failures when entities have tried to do things themselves and failed due to lack of knowledge or simply the lack of manpower. The reason the good consultants are successful professionals is that they have taken their experiences and developed sound methodologies to solve problems, and the reality is that these solutions are worth “selling”.

Another reason to consider a consultant is that even if your organization is one of the lucky few that has qualified staff, it is unlikely that you can add a large project to an existing staff’s workflow and expect them to have the time and resources to spit

out a really good product while maintaining their current duties. When you place uncertain demands on your staff, you face the risk of overextending them and thus losing them. So, believe me, having worked as a consultant and many years in local government; in the end it is more efficient and usually much more cost effective to bite the bullet, pay the money, and hire a qualified consultant to at least manage your project in order to get a quality product in a timely fashion. There is no need to reinvent the wheel when there are professionals out there that have already invented and perfected the process you need. There is nothing wrong with paying consultants for their expertise. If it was easy, you wouldn't need help.

How do we hire outside help?

After getting over the first major hurdle of admitting you need help from a consultant, the next step is preparing a Request for Proposal (RFP); a document which outlines to consultants what you need and usually asks them to price the work. The most common obstacle with preparing a request for proposal document (one that many can never move past) is knowing what to ask for. Many local governments do not have staff with the technical qualifications to be able to write an RFP because they simply don't know what they really need or want.

The best option when looking to write an RFP for a project is to choose the most qualified and trusted staff and make a true effort at getting that person educated on the issue at hand. As a supervisor, you also need to be truly committed to supporting your staff in this education process and staying informed about what is going on. You do not necessarily need to be concerned with technical details, but you do need to make an effort to understand the overall issues, allow them the time they need for research, and stay connected to your staff. As a supervisor or public official, remember, it is your budget and your reputation if the project turns out poorly or wastes money, also remember that blaming past or present staff can make you look incompetent as a manager.

Information gathering

In this important information gathering stage, there are several ways to collect information about the project needs. First of all, companies who provide services will be more than happy to come in early in the process to "show you the ropes". Some companies do this when they think they can establish a relationship with you that will secure a contract; others do it for more honorable reasons such as to help you figure out what to ask for so they can prepare a better proposal to suit your needs. Having been on both sides of this table, I would suggest making vendor connections and asking for presentations, but make it known early on that you are simply looking for technical information and not looking for "back door dealings" meaning that you intend to carry through a fair and unbiased RFP process.

Most importantly though, you should read RFPs that other localities have written for similar projects, and read published industry related articles dealing with your subject. You should also try to make direct contact with peers within organizations that have successfully completed similar projects and perhaps ask them for leads to companies that are recommended as good service providers. Learning from the mistakes and successes of others is crucial for an efficient process.

RFP style

After your information collection process, you need to make some decisions about your RFP document. There are basically two main RFP styles. The first type of document includes an outlined methodology that you ask the consultant to follow

because you have decided that is the best option for the completion of your project. This option will require the most preparation time prior to the release of the RFP and would obviously be used by an organization that had done significant research upfront, and/or has someone working on the document with experience in the project area. The second option is a more vaguely written document that only lists final goals. This type of document does not offer a methodology, but requests that the consultants outline a detailed methodology that they feel is best for the completion of the project.

If you go with the second more open type of RFP, you will need to do the bulk of your research after you receive your proposals, as you will have to review and understand what they are proposing in each of the documents. This will add time to your review process.

No matter which technique you choose, you should provide a clear numbering system and outline for the respondents to follow to ensure the proposals are as equal and easy to compare as possible. It is also a good idea to list as many details and expectation as you can in regard to the type of information that is currently available to the vendor that will be completing the project, what your budget range may be, what level of staff you have that will be working with the project, what you expect from them as far as quality control and follow up service, and what your expectations are as far as communication (progress reports etc.) during the time the project is being completed and after it concludes. By including this type of information, you will get better responses that are more tailored to your situation. If you give too few details you may either get too few responses, or get a huge range of responses that are hard to compare and rank. In this situation you are also likely to be bombarded with questions from potential respondents in the days before the proposals are due. This can cause stress on the staff and lead to biased feelings toward the vendors.

Timeline

It is important to come up with a timeline for the process and try to stick to it as closely as you can. You will need to establish a strict cutoff time and date for the receipt of the proposals and clearly state where to send the proposals. You should also include a timeline for choosing interview candidates, conducting interviews, and finalizing the final contract. Listing a general timeline of when you want the project to start and end is also helpful so the consultant can better plan for the staff scheduling. Leave yourself enough time to thoroughly consider the proposals, but don't make it so long that they forget they sent a proposal. Also be considerate and keep in contact with your respondents to let them know how the process is moving.

Selection process

Whether you include a methodology in your proposal or not, you should outline the details of your vendor ranking & selection process. You will get more serious inquiries if you show through your RFP that you have a fair ranking process. This way companies will realize you probably haven't pre-selected a favored vendor. It is very frustrating as a consultant to put hours of work into a customized proposal, attend interviews, etc., only to find out that there was a company already in line for the job due to past verbal agreements. It is also very inconsiderate of local governments to do this, and it will sometimes give your locality a bad name in the industry, so if you ever need assistance again, you will be less likely to get serious responses from good services providers.

A review committee of at least three people from various levels of your government is a good idea, and a pre-determined ranking process (that can be quantified) is a necessity. The ranking process can show the respondents that you intend to be fair in

the process, and it makes the ranking process much easier for the committee and gives you a way to “defend” the process should that need ever arise. You should determine what issues are important to your organization and create and weigh your ranking categories accordingly. Other than the obvious ranking categories like methodology and pricing, you can give or take points for things like proposal format, level of personalized customization, whether or not they are an in state business, and whether they intend on using off shore labor. The off shore labor issue should be given some attention. Even though the project costs may be significantly lower from those using off shore labor, the fact that elected officials will be spending local tax payer dollars and possibly distributing personal information to undetermined locations around the world can become a volatile political issue that may not be worth the cost savings.

Advertising your RFP

Once your RFP process is completed you will need to advertise according to your state & local laws depending on the cost of the project. You can just advertise locally or you can go as far as advertising on line. If your RFP reaches a national database you will likely receive many more responses. There are websites that are devoted to providing consultants with links to potential government contracts. If you would prefer that your RFP have national or international exposure you can research accessibility to those types of websites and you can usually send your RFP directly to the site.

RFP responses

From here, the real work begins. You will need to accept and document all proposals received, and I would recommend confirmation with each vendor. You will then need to distribute copies of the proposal to each committee member for review and let them rank the responses based on the ranking criteria that was previously established. Asking for multiple copies of the proposal in the RFP document makes this task much easier. If you did not have a preferred methodology you will need to meet with the committee and research and discuss the methodologies that were proposed, which may take some time.

After tabulation of the ranking results choosing interview candidates is usually a “no brainer”. You may want to have a meeting to determine what type of questions you will be concentrating on during the interviews, but with this process, by the time the interviews are scheduled and completed there is usually a clear front runner. You may do a second round of questions or interviews before making your final selection.

Contract document

The bulk of the contract process is usually taken care of by the consultant. Much of the language can be taken straight from the RFP document, but you should read the document carefully to make sure everything is included that you want, and to be sure both parties are clear on what they are responsible for during the process. The one thing that many if not most governments do not understand is that the consultants are in business to make money, this is not dishonest, it is their livelihood. A good consultant will want details in the contract because they understand that being upfront and clear protects you as well as them.

The contract should explain exactly what will be delivered and when, it should clearly list all tasks that will be completed by each party, and give a time schedule of when payments will be rendered; government projects are usually completed in phases so this may require some planning.

Project monitoring

Once the contract document is signed, stay in close contact with the consultant. Communication is a positive thing for both sides as it facilitates a positive working relationship. If you have set milestones and delivery dates be sure to keep track of whether the consultant is delivering as promised. If you become lax, they may start to take the project and formal deadlines less seriously. Most consultants want to provide a product that you are happy with; if you just let them know what that is, they will do their best (within the constraints of the contract language) to provide that to you. Your satisfaction with their product is their best marketing tool.

By hiring a consultant, you can utilize the latest specialized resources without having to hire new staff. Just be sure to be informed about your project needs, be clear about what you want/need, hire a vendor that has a good reputation, develop a positive relationship with the consultants, stay engaged in the project, and communicate any unsatisfactory work as early as possible. As in most relationships, information and communication is the key to success!!



Melissa Shelton Scott has worked for 15 years in various technical and administrative positions in regional and local governments in Michigan, West Virginia, and Virginia. Five of those years were spent working as a consultant to government agencies, and the last six years of her career has been spent braving the planning and technology frontier in the West Virginia local government arena. Melissa is currently the GIS Coordinator for Greenbrier County, West Virginia.