

99

CONSULTING

*Good thinking*

Briefing Tips

The more a consultant knows about your project, the more likely you are to receive a proposal that addresses your needs. Here are some tips from 99 Consulting about developing a general brief that will get you the best possible offers. (Of course, don't forget to check your in-house policies about contracting consultants too!)

*Critical questions for a consultancy brief:*

<i>Brief element</i>	<i>Description</i>
Drivers	Why are you doing this project? (eg stakeholder pressure, funding body requirements, problems that need to be resolved, opportunities you want to take advantage of)
Background	What has been done before in the lead-up to this project?
Goals	What do you want to change or to happen as a result of this project?
Outputs/deliverables	What are you expecting from this project in terms of reports or products? In what form do you need these products – digital, hard copies? How many copies?
Timeframes	What is the deadline for the project? What are other non-negotiable dates within the timeframe? When will you make a decision so the project can start?
Budget and/or scope	Do you need deluxe or basic? To help us get a sense of what you're envisaging, either a suggested budget for the project or a suggested methodology/ project components are useful. Any project can be done as a 'top shelf' item or a 'quick and dirty' if required – try to signal where yours is on the continuum.
Stakeholders	Who will the consultants have to work with? Who will make decisions?
Consultation requirements	Who will the consultants need to talk to? Are there existing mechanisms to talk to these people?

<i>Brief element</i>	<i>Description</i>
Selection criteria	<p>What are the factors you will consider when deciding on the consultant? Are some criteria weighted more heavily than others? Some useful criteria are:</p> <ul style="list-style-type: none"> <li>• understanding of the brief</li> <li>• proposed methodology</li> <li>• relevant experience</li> <li>• knowledge of the sector</li> <li>• project management capacity</li> <li>• value for money/pricing</li> </ul>
Mandatory requirements	<p>What are the givens for the consultant? e.g. insurance coverage or independent office accommodation? Are your organisation's standard requirements really relevant in this case (e.g. do you really need \$10 million in public liability insurance for someone writing a strategy; and do they need to be quality assured?) For big-budget projects of course, probity requirements will be very rigorous to minimise any risk</p>
Referees	<p>If certain aspects of the project are critical, you could ask for referees who are able to comment on that area</p>
Contact point	<p>Who is the contact point for consultants throughout the project?</p>
Submitting proposals	<p>When, where and in what format can proposals be submitted?</p>

### *Other tips:*

- Make yourself available to discuss the brief with potential tenderers if possible.
- Allow a reasonable amount of time for people to put together a decent well-thought-out submission.
- Be prepared to negotiate with consultants if you like their approach but you think their submission misses the mark on certain points.
- Think about what really matters to you from this project, and make sure that is what is emphasised in the brief.
- For example, if you want a participative process that really tries to get stakeholders involved, tell us that. Alternatively if what's most important is an elegant report or a diagnosis of issues and solutions, let us know.