



**Scotland's Third Sector  
Governance Forum**

**Consultants for good<sup>®</sup>**

# The Recipe for Choosing a Consultant

## **Step 1: Write the initial brief**

Before trying to identify a suitable consultant, it is important to draw up an initial brief for the work. This could be anything from a short outline of the problem you want to address, to a more elaborate description of the proposed work, complete with provisional costings and timetable.

## **Step 2: Identify people with relevant expertise**

Consultants for Good's directory enables you to search for consultants with key specialisms and who work in certain sectors. You may also wish to use other sources to locate suitable individuals or firms- such sources might include your local third sector interface (TSI) or rural community council, an umbrella or support organisation for your type of work. You might also want to advertise in third sector, local or national media.

## **Step 3: Draw up a shortlist**

From the consultants you have identified choose three to five people who meet most of the criteria on your person specification.

## **Step 4: Make initial contact and ask for information**

The purpose of this stage is to explore in some depth your needs and their suitability.

## **Step 5: Meet the person**

It is important for you and other relevant people in your organisation to meet the person before making a final decision.

## **Step 6: Make the decision**

Your original brief and person specification give the basis for assessing whom you should hire.

## **Step 7: Agree the contract**

Once you have decided, the agreements arrived at should be incorporated into a written contract.

## **Step 8: Monitoring and evaluating the work**

While evaluating, try to think about, at least, the outputs, process, and outcomes.

*A full version of this guide can be found at <http://bit.ly/choosingaconsultant>.*

