

**Working with Consultants**

Consultants are often contracted with because a deeper level of knowledge or expertise in a particular field is required or to support processes like grant applications. When working with a consultant it is critical to clearly articulate your goals for the project. It is also important to allow the consultant to explore the issues in a manner based on their years of experience however, despite their years of experience, you should never take the recommendations of a consultant at face value; ask questions and make sure all options are weighed. The consultant may be an expert but the organization is responsible for the ultimate decision and its affect on the property.

**Guidelines for Working with Consultants**

- Before searching for a consultant define the overall goals for the project
- Articulate the philosophical underpinnings of the organization and/or site and any restrictions that may be present
- Clarify your expectations by developing a written statement about the project.
- Interview potential consultants to find the right professional and philosophical fit for Historic New England.
- Confirm the scope of the project, expected time frame, phasing, deliverables, and fee structure with the selected contractor
- After the contract has been awarded keep the project schedule on track by providing all necessary and/or requested information.

# Property Care White Papers

## Consultants: General Guidelines

### Technical Information for Working with Consultants

*Before searching for a consultant define the overall goals for the project*

- If the goals are clearly articulated then both Historic New England staff and the potential consultant will be clear about the objectives of the project.
- Keep the goals focused on the large scale and overall what you want to accomplish.
  - What are the individual problems you are trying to solve?

*Articulate the philosophical underpinnings of the organization and/or site and any restrictions that may be present*

- The philosophies of the organization – such as the preservation approach – are important to clarify up front.
- An historic site may have interpretive or legal restrictions that should be clarified for the sake of the consultant. For example:
  - The property has local or state historic restrictions.
  - Land use restrictions such as conservation or agricultural
  - Physically a back room can be used for offices however no physical alterations can be made to the materials so that it can be used interpretively in the future.
- Be prepared to give copies of any pertinent documents to the consultant.

*Clarify your expectations by developing a written statement about the project.*

- A wide range of consultants are potentially available for any number of subject areas. Clearly identifying your expectations will help identify what type(s) of consultant(s) required for the project.
- Do your research by reviewing consultants used in the past and also by talking to peers about consultants they have used for similar projects.
- Create a Request for Proposal (RFP), even if it is transmitted in draft form, in order to clearly define your objectives to all parties.
  - See Appendix A: Request for Proposal Outline

*Interview potential consultants to find the right professional and philosophical fit for Historic New England.*

- The RFP is a format in which to clearly define the objectives for the project, preliminary scope of work and other variables that might affect the development of a proposal. Providing an RFP to all potential consultants means they will all be reacting to the same information and you will not accidentally forget to impart information.
- There are several different ways to interview consultants. Interviewing should take place before final estimates or bids are collected.
  - Smaller projects can be more informal and at the discretion of Historic New England and the consultant.

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- Private interviews with multiple consultants can be staggered over the course of a day or several days for separate interviews.
- Larger projects may require one set meeting time for all consultants to attend.
- Projects expected to exceed Historic New England's threshold for bidding of projects (see the Policy and Procedures Manual) will require three bids.
- Projects with outside funding may require Historic New England to follow a specified bid and review process.
- Use the discussions with the potential consultants to refine the scope of work. But be sure to submit the changes to all potential consultants who might bid on the project.
  - Be flexible during this process because different consultants may have alternative approaches to the situation. Learn from the different discussions and allow the process to inform the final scope of work.
- In certain instances the consultant may be pre-selected for work not requiring bids. That decision should be based on past work and a comfort with the consultant and their product.

*Confirm the scope of the project, expected time frame, phasing, deliverables, and fee structure with the selected contractor*

- The RFP and the project bid should include all of these details but when actually selecting the consultant make sure these details are reviewed and are understood by both parties.
- Check references and review projects of similar scale and scope to understand the working style and product of the consultant.
- Make sure all the pertinent details are clearly articulated in writing
  - Scope of work: Identifying what they will be trying to accomplish
  - Phasing: Their approach and how they are moving through the project.
    - Times for staff review of preliminary proposals should be clearly articulated and how will that review be handled
    - The schedule should be adjusted to make sure ample time is allowed for internal review.
  - Fee structure: At what points will they require payment, will their be reimbursable charges, and what is the fee structure for additional work or additional phasing
  - Deliverables: see the deliverables white paper for more detail.
    - In general 5 hard copies and digital versions should be required.
  - Time schedule: When will the consultant start and complete the project
    - Special attention should be paid to the review components and allowing ample time for staff to review.
- Create a contract spelling out all necessary details.
  - Any detail not identified in the proposal should be highlighted and added to the Historic New England contract.

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*After the contract has been awarded keep the project schedule on track by providing all necessary and/or requested information.*

- Make sure you promptly provide any requested information
- Request regular progress reports and review timetables and responsibilities
- The biggest roadblock in projects is often not allowing the proper time for internal review.
  - Review might involve staff, team leader for property care, PPIP, leadership team, committees or other outside persons, or any combination of the previous.
  - It should be known what levels of internal review might be necessary before the project is started and that timing should be incorporated into the project timing at the very start.
- Depending on the project the consultant's scope might involve review by external groups such as municipalities or historic commissions.
  - External review should take place after internal reviews have been secured.
- Clearly articulating the scope of work before the project and a fee schedule for additional work will make changes of scope easier to manage.

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#### Appendix A: Request for Proposals (RFP)

Every project should have a scope of work developed internally however some projects, perhaps to satisfy internal procedures or for outside organizations like funding agencies, a more formal Request for Proposal (RFP) should be issued. The RFP ensures a certain level of consistency to the process by providing the same information to all parties. It requires staff to clarify their thinking before speaking to a contractor or consultant. It is understood that sometimes details change during the bidding process so a RFP addenda that clarifies these issues or questions should be sent to all potential bidders to maintain the consistency of information.

An RFP is typically broken into several components as listed below:

#### Project location

Identify name and address of the project site

#### Project Name

How you would like the project referred to moving forward.

#### Objective

Identify the overall objective of the project.

#### Background

Detail information that may be pertinent to the project such as the history of the organization, the site, preservation restrictions, interpretation, etc.

#### Project Description/Project Scope

Detail the scope of work for bidding purposes.

#### Phasing/Schedule

Scheduling constraints that the consultant needs to adhere to such as end dates or dates that certain elements have to be completed by.

#### Deliverables

Identify the expected deliverables for the project and number of copies expected.

#### Pre-Bid Meeting

Often projects will require a meeting on site to review the scope with the contractors or consultants. Meetings can be requirement for bidding or can be identified purely as an opportunity to see the site.

#### Proposal Due Date

At what time and what date are the proposals due by.

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#### Proposal Evaluations

What methods are going to be used to evaluate the proposals. Certain funding agencies may have requirements that you need to consider as part of the evaluations or may require lowest qualified bidder. Criteria used to identify the winning bid or to define contractor or consultant qualifications would be included as well.

#### To submit a proposal or for more information:

Identify what form the proposal should take (pdf, hard copy) and how many proposals are required. Identify contact name, mailing or email address and phone number.

#### Addenda

Possible attachments to an RFP.

#### Bid Sheet

A form that details each component of the project including a space for the contractor to fill in his estimate for that line item. Having each contractor fill in the bid sheet allows for a consistency of bidding and the ability to compare bids from all parties.

#### Specifications

Any specifications or scope documents that apply to the project.

#### Drawings

Drawings or details that might be pertinent to the project.