WORKING WITH CONSULTANTS

Buying in temporary expertise is a growing practice in the museum sector with most museums unable to afford specialists on a permanent basis. Museums’ increasing reliance on project funding and the sheer complexity of bidding for, planning and executing major projects has also led to a sharp rise in the demand for consultants of all kinds, and there is an abundant supply of professionals with skills and experience to sell. With so much now at stake, museums may need to think more carefully about how they recruit and manage consultants.

A Museums Association survey in the 1990s showed that nearly one fifth of respondents relied purely on verbal estimates and agreements when employing consultants; many were uncertain what insurance cover was needed; and 61 per cent of consultants questioned had never been asked for a reference.

This briefing presents practical advice drawn from sources both inside and outside the museum sector. Some of it is common sense; some of it may be impossible for museums trying to achieve great ambitions on shoe-string resources; some of it may not be necessary for small projects. However, it should provide a baseline for ensuring that consultants’ work is of lasting value to museums, their audiences and their collections.

What is a consultant?
Someone who sells their expertise and advice to a client according to an agreed contract and for a set fee. In the museum sector where many consultants are self-employed, there is a fine line between this form of expertise and that of a freelance - a self-employed professional who carries out skilled work for an organisation on a temporary and/or part-time basis. Their main difference is that freelances usually do the work rather than advise on it, and are paid according to the time they put in. This briefing concentrates on consultants, but some of the points will apply to freelances too.

Do you need a consultant?
■ Do you need access to specialist or technical expertise and experience not available on a day-to-day basis?
■ Do you lack the staff resources to carry out an important project?
■ Do you require research on a specific area, or recommendations on how to achieve specific objectives?
■ Do you need an objective input and/or fresh ideas in deciding how to make changes to or develop museum services?
■ Do you need an independent assessment and/or an authoritative opinion to attract support and/or approval from a governing body or influential party?
■ Do you need to stimulate new ways of thinking or working among staff or volunteers?

If the answer to one or more of these questions is yes, you may benefit from employing a consultant. However, briefing, selecting and managing a consultant requires a great deal of human resources. It is important to define the project and set clear objectives and also ensure that the consultant understands and works within the museum’s culture and standards. Other points to consider include:
■ do staff and/or volunteers have the time to support the consultant?
■ do you need to stimulate new ways of thinking or working among staff or volunteers?
Recruiting a consultant

Most museums find their consultants through word of mouth. However, a more formal approach is likely to achieve better results. Some experts recommend inviting proposals from and or, if possible, interviewing three consultants.

Defining and planning the project

This should be done in consultation with key staff. It will form the basis of the brief. You should set out:
- the background to the project
- your aims and objectives. How will the museum benefit from the work, both immediately and in the long term?
- the job the consultant is required to do. What tangibles do you expect them to deliver?
- the timescale
- the budget
- the role of museum staff or volunteers. How much of their time will be made available?
- how the lines of communication between the museum and the consultant
- the person who will monitor the consultant’s progress
- the consultant’s access to museum facilities, space, equipment, administrative support
- whether the consultant will need to coach staff or volunteers in aspects of the work
- how the consultant’s work will be taken forward. Do you require an action plan?
- if you require a presentation at the end of the project
- ethical requirements.

Finding suitable candidates

Sources of information include lists such as those held by the Group for Education in Museums, the Regional Agencies, mda, the Museum and Exhibition Design Group, the directory of consultants in Museums Yearbook; case study material in Museums Journal and Museum Practice; advertisements in Museums Journal; resources lists in Museum Practice; conferences and exhibitions; brochures and other direct mail.

For bigger contracts, over £10,000, it is particularly important that the recruitment process is seen to be fair and transparent. Clients should therefore advise candidates whether they are tender into a suitable publication(s) such as Museums Journal, asking interested consultants to contact the client for further information.

Inviting proposals

To prepare a detailed proposal, consultants will need an outline brief for the project specifying the requirements, objectives, budget and time constraints.

The consultant’s proposal should contain:
- their understanding of the problem and the brief
- names and CVs of the consultant(s) who will be doing the work
- experience and examples of previous projects
- references - these should be specified in the brief
- work plan and timescale
- reports and/or systems to be supplied
- fees
- inputs required from the museum.

Interviews

Most experts recommend a short-list of three consultants. Consider whether you require a straight interview or a presentation of the proposal. Consider who should be present and ensure the person who has the authority to make the appointment is there.

Refining the brief

A brief is not legally binding. It is a blueprint for the project; more than anything, a good brief ensures you end up with a satisfactory result. It should cover all the points listed under Defining and planning the project (above). Once you have made your selection, the details of both your brief and the consultant’s proposal should be discussed, refined and agreed upon before any contract is signed (see figure 2).

Managing the project

Setting up

Staff and volunteers should be prepared for the consultant’s arrival and fully briefed on the project and their own role. Key people should be introduced formally before the project starts.

The consultant should be encouraged to talk to as many relevant people as possible and gain an insight into the way the museum works. Ensure all necessary information is made available by staff within the agreed timescale.

Start a contract file. By the end of the project this will contain:
- a copy of the brief and terms of reference
- a copy of the proposal
- the contract
- any changes to the brief or proposal
- a record of all payments
- minutes of meetings and feedback sessions
- notes from any telephone conversations
- implementation plan
- the project evaluation

Monitoring progress

Progress meetings should be a formal part of the project. Progress should be measured against the agreed objectives in the brief. Voice any concerns about the direction or standard of work as early as possible and formalise these in writing if necessary. Clarifying your expectations may be enough to put the project back on track. Be firm about the museum’s priorities and ensure these are not misunderstood or being subjugated by the consultant’s own. The last resort is to cancel the project, rescue what you can and employ another consultant. It may be, however, that work proceeds the brief needs to be altered. This should be done only after consultation with all key parties and should be agreed in writing.

The consultant’s report must be presented in a format that is accessible and helpful for the museum and other end users. Ask for a draft report that can be discussed by the project team before the final document is written.

If the finished product does not meet your expectations, establish where the fault lies and discuss ways of remedying this with the consultant.

Evaluate

According to the MA survey, museums hardly ever evaluate their consultants formally. However, assessing the effectiveness of a project will be of help to the museum in commissioning future projects, and to the consultant in tendering for further work. For training, workshops, education days or public events, museums should consider asking participants to complete a feedback form. The museum’s evaluation should cover whether the project objectives were met, any difficulties or problems and how these were overcome, an assessment of the consultant(s), adherence to brief, budget and timescale, and the quality of work produced.

Follow up

The action plan should be discussed again with the consultant and refined before the contract is signed. Consider inviting the consultant to help with any implementation work. If this is not included in the contract it is important to write a new brief and get a new quotation and proposal, even if it leads directly on from the current assignment.

Discuss circulating reports with the press or other interested parties, and when writing up project results for journals such as Museum Practice (contact the editor first).

To order a successful achievement of your aims you need:
- access to information about consultants
- an effective selection process
- expert advice on the specialist area, if it is outside the museum’s field
- a well-written brief
- a contract covering all aspects of the project
- an understanding of what the museum itself must contribute
- an evaluation process that will pick up problems quickly and allow you to learn from them.

Sources and further information overleaf

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**Figure 1: What type of output do consultants/freelances usually produce for a museum?**

<table>
<thead>
<tr>
<th>Output Type</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Written output (report, guidelines, policy document, research)</td>
<td>100%</td>
</tr>
<tr>
<td>Non-written output (presentation, project management, counseling, training, facilitating discussion)</td>
<td>97%</td>
</tr>
<tr>
<td>Partial output (project contribution (producing publications, running events, interpretation, education service))</td>
<td>74%</td>
</tr>
<tr>
<td>Partial output (writing software, designing, conservation, photography, installation)</td>
<td>59%</td>
</tr>
<tr>
<td>Non-output (time management, business development, client services)</td>
<td>31%</td>
</tr>
<tr>
<td>None (creation, generation)</td>
<td>6%</td>
</tr>
</tbody>
</table>

(Source: Hasted)