

Appendix 1

Guidelines for Preparing a Request for Consultation (RFC)

Your company background information

Provide an overview of your business, including a brief history and explanation of the current situation.

What events, circumstances and issues led to your request for a consultant?

What is the goal of the consultation?

Clearly state the goals you want to accomplish, as a result of the consultation.

Can you detail specifics about what you want help with?

What objectives must be met to consider this a successful consultation?

Write three detailed items that you wish to take action on in the future, as a result of the consultation.

1.

2.

3.

Time period for consultation

What is the start and end date for the consultation?

Start date: _____ End date: _____

My ideal process

Describe how you would like the consultant to keep you advised of the status of the project and any significant deliverables. (Examples may include meetings, email updates and/or interim reports.)

Deliverables for the consultation

How do you want the consultant to present their progress? (For example, you may wish to see a preliminary work plan with activities, deliverables, time estimates and a schedule.)

List the items you want to have at the end of the consultation. (An example may include a written final report and/or a presentation.)

Assessment of the project

How will you assess the project’s deliverables?

Selection process

Describe how you will select the consultant, the interview process, criteria you will use, etc.

The project budget

Detail a range for the budget you wish to pay, including a maximum cost.

Describe how you would prefer to be charged for the services. (For example, hourly, total project fees, retainer.)

Describe what you would like to have included – or not – in the quote. (For example, travel expenses, office expenses, outside costs such as soil tests, etc.)

What are your preferred terms for payment? (For example, invoiced in scheduled payments, monthly, or payment at the end of the project.)
