In many areas of the world, it would seem that finding a safety consultant is as easy as scanning the yellow page advertisements and placing a phone call. Although this strategy may seem the most direct, a consultant selected through such a process may not be the best person for the job.

Selecting the right consultant is similar to choosing a personal physician. Much like physicians, some safety consultants are generalists, others are specialists. Be it for medical advice or safety advice, you want an experienced, knowledgeable, certified professional who you trust and with whom you can communicate. Just as you entrust your health to a physician, you entrust the safety and health of your company to the selected safety consultant.

**WHY HIRE A CONSULTANT?**

Deciding whether to handle an issue in-house or hire a safety consultant can be difficult. As with any business decision, an organization must know its capabilities and the boundary of its comfort zone. A company should not expect in-house personnel to provide technical safety counsel beyond their level of knowledge and experience. Staff personnel also must recognize their limitations and inform management when external expertise is needed.

Let’s review some common reasons a company might hire a safety consultant.

**Time, Time, Time**

A firm with in-house safety expertise may employ a safety consultant because on-site personnel simply do not have the time or because the department is understaffed. Often, these factors are accounted for in annual budgeting, which allows for the use of external consultants as needed.

**Expertise Needed**

As noted, in-house safety personnel may not have the necessary technical expertise, hence the need for an external expert. It should be noted that resources available through insurance arrangements may not include access to personnel with the level of safety expertise required.

**Safety Process**

A company may seek the input of safety consultants to help develop alternative strategies, improve safety process design and implementation, or facilitate continuous improvement.

**Specialty Training**

Some safety consultants offer intensive training in a focused topic, such as HazMat, lockout/tagout and crane safety, to supplement existing training.

**Safety Assessment/Auditing**

To establish a baseline or benchmark against best practices, a company may seek a formal independent, third-party review of its overall safety process.

**Technical Engineering Projects**

Some safety consultants are specialists in advanced technical engineering projects, such as the design and evaluation of silo systems or sprinkler systems.

**Forensic Assistance**

Through corporate counsel, a firm may hire a safety consultant to provide forensic assistance and guidance on high-profile issues (e.g., response to regulatory inspections, investigation of serious accidents, potential or real liability concerns).

**DETERMINE WHAT IS NEEDED**

Before selecting a safety consultant for a project, an organization should formally identify the project’s purpose and scope. For example, “Evaluate the effectiveness of the organization’s safety and health self-audit process, and benchmark the process against accepted industry standards and comparable industry leaders. The safety and health consultant will evaluate and provide a report on the management system, risk identification, employee involvement, regulatory com-
Selecting a Consultant

Assess needs.
- Determine internal staff capabilities.
- Assess how much funding is available to hire a consultant.
- Determine a reasonable timetable for project completion.

Define the consultant’s role.
- Identify his/her areas of expertise.
- Determine how this expertise can enhance/facilitate the project in question.

Evaluate qualifications.
- Critically assess each candidate’s capabilities and limitations.
- Review a consultant’s marketing materials and check for relevant educational background, work experience and professional certifications.
- Obtain reference lists to verify the quality of the consultant’s work.

Meet with prospective candidates to outline the project.
- Explain project objectives.
- Define the consultant’s role and discuss the timetable for completion.
- Ask who would be working on the project and assess their qualifications.

Request for Proposal
Although each project is unique, each candidate’s proposal should contain several key elements:
1) Explanation of services to be offered and how the work will be performed.
2) Names and qualifications of key personnel and their project responsibilities.
3) Target project start and completion dates.
4) Details on all costs and billing procedures.
5) References to current/former clients.

Review proposals.
- Assess whether each proposal has addressed stated needs/requests and whether it provides sufficient detail.
- Determine whether fees stated are reasonable for the project’s objective and scope.
- Ensure that key responsibilities—for both company and consultant personnel—are defined.

FOR YOUR REFERENCE
The following resources may be of value when selecting a consultant.

Many organizations require external safety expertise and specialized resources for everything from strategy development to project management. Depending on location, the type of project and economic factors, the process of identifying a qualified consultant can be a difficult process. To minimize search time and ensure that the most-qualified candidate is selected, initial efforts should focus on safety professionals affiliated with recognized professional safety organizations such as ASSE, which maintains an online Directory of Safety Consultants. Well-managed relationships with effective selected consultants can add significant value to a company’s overall safety effort. The key is to develop a thorough selection process—one that features an organized bid and proposal process—in order to ensure that the selected consultant is right for the job.

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