



## SELECTING A SAFETY & HEALTH CONSULTANT

By JACK POPP

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 Haz-Mat, 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.

through established partnerships. Other key factors include the consultant's availability and ability to meet the desired completion date.

In addition, the proposal should include a formal acceptance and signature segment for approval by officers of both organizations. It should also include current certificates of insurance for sufficient levels of general liability, auto liability, workers' compensation and employer liability, and professional liability. The levels of insurance limits (e.g., \$1 million for each occurrence) should be specifically stated.

In addition, the company should be named on the certificate as an "additionally insured," with a 30-day notice of cancellation from the broker/agent if the policy is to be canceled. This "naming" should also be noted on the certificate of insurance and be backed by an endorsement to the original insurance policy; the endorsement and policy number should be included on the certificate as well.

## 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.

*ASSE Directory of Safety Consultants*. 18th edition. Available at [www.asse.org](http://www.asse.org).

*Selecting Consultants for the Team*. Construction Industry Board, ed. American Society of Civil Engineers, 1996.

*Selecting and Working with Consultants*. T. Ucko and Michael Crisp, eds. Crisp Publications, 1990.

## CONCLUSION

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 effectively 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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pliance, audit team performance and continuous improvement."

A project outline should be developed as well. This defines the project's structure and details how each prospective consultant's proposal will be compiled and submitted. Establishing a detailed system allows for an apples-to-apples comparison of proposals.

An example of a project outline:

- Consultant will attend an initial project meeting on site to review project schedule, expected lines of communication and any special handling instructions (e.g., attorney/client privileges).

- Consultant will review self-audit process materials.

- Consultant will attend a follow-up meeting to ask questions and seek clarification on work performed to this point.

- Consultant will observe self-audits of all system elements.

- Consultant will provide a draft re-

port outlining observations, conclusions and recommendations.

- Consultant will attend a closing meeting on site and present a pre-determined number of bound copies of a final report for senior management review.

Each proposal must provide an overview of the consultant's organization, including applicable experience, credentials and certifications of project personnel. References (with contact names) of firms that have used the consultant for similar projects should be requested, and these groups contacted. Ideally, the consultant should be able to benchmark against a similar process of at least two other industry leaders or world-class organizations.

The proposal should also quote a fixed fee for all time and expenses required to complete the project as outlined. When possible, the organization should consider booking the consultant's travel arrangements to realize any cost-savings available

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