

Safe Patient Handling and Mobility Toolkit – Tool 3h

To learn more about using this tool refer to the Section 3 in the Safe Patient Handling and Mobility: A Toolkit for Program Development 2025 at: <https://www.nvha.net/safe-patient-handling-and-mobility-toolkit/>

Tips for Finding Consultants or Outside Resources.

Here are some tips to help you achieve a win-win situation when choosing a consultant.

Are you ready to hire a consultant?

- **Self - Examination**

Be critical of your organization's commitment to the project that you require a consultant for. If leadership/management are not supportive it will make acceptance of a consultant's suggestions more difficult.

- **Needs Assessment**

Define your needs before looking outside for help. It is important to have a well-defined project plan that includes expectations, objectives, and timelines etc. The need for a consultant or outside assistance, the scope of work expected, together with the budget available for outside support, must be clearly defined.

- **Check your Organizations Policy & Procedures for Hiring Consultants/Contractors**

Work with the department responsible for hiring contractors in your organization. In a health care organization this may be procurement, human resources and/or legal/compliance.

They can assist you to understand the organization's process for contracting with consultants including the terms and conditions that must be followed and the request for proposals (RFPs) process.

How do you find a consultant?

- **Resources**

When searching for consultants, look to see who has published articles in trade magazines, peer reviewed journals, or given presentations at professional association conferences. Contact professional organizations for assistance – some offer consultant directories. Ask your colleagues in other health care organizations for recommendations. Check if your organization has previously used consultants who can help.

What credentials and experience should a consultant have?

- **Education**

Does the consultant have the appropriate education and relevant work experience background?

- **Specialization**

Be aware of job specialization within the consultant's profession. The consultant's expertise and experience may be too narrow to meet your objectives.

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- **Cross Training**

A consultant with broad experience covering different aspects of your topic will usually offer greater insight into your situation.

- **Extracurricular Activities**

Has the consultant published articles and made presentations at professional meetings and seminars that you can review?

- **Memberships**

Check to see if the consultant is involved in professional associations related to their area of expertise etc.

- **Continuing Education**

How does the consultant keep up with the latest ideas related to their area of expertise? What continuing education does the consultant complete and how often?

- **Overall**

Any prospective consultant should be open in response to questions about credentials. Look for certifications, education and specific experience related to your needs. Can they demonstrate knowledge of relevant methodologies and best practices? Provide evidence of the effectiveness of their solutions in previous client projects and support your project with relevant published evidence, papers or presentations.

- **References**

Check references closely. Verify the consultant's references with health care organizations where they have recently performed work that is comparable to the services you are looking for.

Will the consultant be a 'good fit' in your organization?

- **Philosophy & Culture**

Does the consultant's philosophy fit with your corporate and management culture? They should show genuine interest in your success by asking insightful questions about your association, rather than just focusing on selling their services.

- **Politics**

Make sure the consultant is aware of any company politics and that they can adapt to your organization's culture and work within those constraints.

- **Communication**

The consultant should demonstrate proficiency in both verbal and written communication, utilizing standard terminology and language appropriate for the field. They should be able to explain complex concepts in understandable terms.

If appropriate, conduct a walkthrough of the project's target work area (s) with a prospective consultant and observe how well they communicate and interact with employees.

Are they responsive and accessible throughout the selection process?

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A competent quality consultant should be able to clearly articulate how they will contribute value and assist in evaluating the effectiveness of their efforts.

- **Recordkeeping**

If you can provide good records of your problem, the consultant will be able to provide better problem-solving ideas.

What is the consultant's approach to providing services?

- **Approach to conducting business**

Get an understanding of how the consultant conducts business. Is an equal approach to a problem emphasized or is one method favored over another.

- **Cost Consciousness**

Look for a consultant who can provide practical, cost-effective solutions - 'real world' versus a theoretical approach. Review problem-solving approaches used with former clients.

- **Deliverables and Terms** (*Refer to the resources below for more information*)

Can the consultant:

- Identify a clear scope and methodology for addressing your project needs and identify specific deliverables they will prepare
- Meet required project timeline and milestones
- Provide a clear fee structure with no hidden costs
- State the means to update a contract if necessary
- Provide professional contract terms, required insurance coverage and comply with confidentiality agreements such as HIPPA

- **Personnel**

If you hire a consultant, ask who will be performing the work. Will technicians be used after the first visit?

Lastly...

- **Prepare for surprises.** Ensure you know what to expect if the project shifts direction and the scope of work changes or faces delays. Clarify how the consultant will manage unexpected challenges – because inevitably they will occur.

- **Expectations**

If you want consultants to solve a specific problem, be prepared to give their solutions time to take effect.

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For more information about working with consultants refer to the following resources:

Center for Community Health and Development at the University of Kansas (ND). Community Toolbox- Chapter 12. | Section 8. Choosing a Consultant. <https://ctb.ku.edu/en/table-of-contents/structure/training-and-technical-assistance/choosing-consultants/main>

Cory S (2023). 10 Tips for Selecting and Working with Consultants and Contractors. The Pennsylvania Association of Nonprofit Organizations (PANO). <https://pano.org/10-tips-for-selecting-and-working-with-consultants-and-contractors/>

Press C (2017). Tips for successfully selecting and working with consultants. Beckers hospital review. <https://www.beckershospitalreview.com/hospital-management-administration/tips-for-successfully-selecting-and-working-with-consultants/>

Warren, L (2019). How to Choose a Healthcare Consultant part-2. The American Academy of Orthopaedic Surgeons. <https://www.aaos.org/aaosnow/2019/oct/managing/managing01/>