

NEED CONSULTANT HERE'S HOW



FM CONSULTANTS
COUNCIL

July/August
2019 Supplement

Selecting and Procuring an FM Consultant

By Karla Reid

Welcome from team of FMCC to the third of our 2019 supplements to the booklet and now FMCC program, [“Need a Consultant; Here’s How”](#). The feature this month is **Selecting and Procuring an FM Consultant**.

Previously – Supplements 1 and 2

Our first 2019 supplement asked, **“Why would an FM need a Consultant?”** and made the case for recognizing the need for and viewing FM consultants as readily available, convenient and economical resources adding value to the FM Organisation.

An [IFMA White Paper on Strategic Facilities Planning](#) identified certain core FM needs and how to set up the framework to meet them. A consulting FM would be part of such a framework- a resource to apply at the right time.

Our second supplement **“Making the Business Case for an FM Consultant”**, arises from distinguished FMCC members Rich Fanelli and Peter Stroup, speaking in the FMCC webinar to introduce **“Here’s how”** series. The article, published in the May FMCC newsletter, extends guidance offered in the webinar as to how the FM Professional, develops, delivers and wins the business case for hiring an FM Consultant into the team. We encourage FMs to:

- Know the need
*What is happening? How do we make it better?
What is the Impact if this need is not met?*

- Know what is important to your audience;
Is it Financial, corporate social responsibility, growth, competitive edge with technology or core business?
- Drop the pennies;
What’s in it for the stakeholders? Use informal meetings and monthly reports to make the crescendo for your case;
- Show what the consultant engagement delivers,
Give the salient points of value gained and resources expended.

In the current supplement, we focus on selecting and procuring an FM Consultant.

We begin with **“What am I looking for?”** Michel Theriault, FMCC member, practicing consultant, author, and presenter in the Here’s How original webinar, Michel spoke directly to that question and noted:

“Consultants are different from a service provider hired to execute tasks or provide products that you buy. You should have a clear idea of the result that you require”

Specify Consistently

To develop consultant scope, gather the pieces from your approved business case. Then assess how you would structure what you need from your consultant. Should the consultant deliver closely specified results, open-ended, or some of both?

Then more closely you can specify deliverables, the more consistently you can price each one and evaluate the results delivered by the consultant.

- a) Prequalify – determine and follow criteria that a consultant must meet to be considered.
- b) Identify success factors; “What would make this Consultant the right partner?”
- c) Ensure the success factors are appropriately demonstrated.

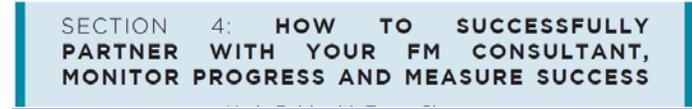
Discussion

In large organizations and complicated circumstances, just developing an FM Consultancy RFI and RFP then obtaining and evaluating responses may make use of a specialist FM Consultant to support the organization team to retain the right project consultant. Should this apply in your organization and level of planned expenditure, your business case, procurement strategy, and budget must include and obtain approval of the initial consultant as part of the overall project. Fortunately, specialists like this often provide fixed, incremental fees. At the other end of the scale, brief or small engagements with a pre-approved FM consultant may be carried out conveniently using a time and materials contract with preset limits. Such contracts can be little trouble to acquire and manage. Many FM teams are competent to procure and manage consultants in this way, just as they do with outsourced FM services.

Notes

[FMCC maintains a Consultant Directory in Engage](#), where members self-list. Currently, the directory has over thirty consultants from across the world who can support you on almost every FM circumstance.

Our next Supplement will be our last of the series and focus on “Measuring the success of your FM Consultant”



Karla Reid is an FM Consultant in Abu Dhabi. Karla manages the *Need a Consultant; Here’s How* FMCC program and is primary author of this series. Contact Karla at editor-heres-how@fmcc-ifma.org

David Reynolds is President of the FMCC. Contact David at president-fmcc@fmcc-ifma.org

We always appreciate your feedback and ideas.

Further Reading:

<https://www.rics.org/uk/upholding-professional-standards/sector-standards/real-estate/procurement-of-facility-managemen>

ATTACHMENTS

FM 2020 Strategy							
S/N	Key Requirements	GR/Ref	General Requirement	Detailed Requirements	Deliverable	Timeline	Cost
A	FM Strategy	A-01	Existing and Planned Asset Stock	Review of current asset stock	Condition Survey & Life Cycle Assessment Report		
				Review of planned acquisitions &/ or New Projects	Forward Planning and funding register		
				Statutory compliance gap analysis on existing asset stock	Gap Analysis Report on Statutory Compliance on Assets and requirements to bring them in code		
				Complete Asset Appraisal Report on existing and planned assets	Asset Appraisal of the estate		
		A-02	Resource Assessment	Skills review of existing staff	Resource Plan		
				Skills assessment of required personal Performance assessment of current specialist and third party service providers			
A-03							

ATTACHMENTS



Key Tender Documentation	
Procurement Stage	Documents
Pre -tender	PreQualification Question
	Non Disclosure Agreeeme
	Confirmation of intent to
Tender	RFP
	Pricing Schedule
	Evaluation Criteria
	Submittal schedule
	Draft Agreement
	Reference Documents