Selecting and Hiring an OH&S Consultant Fact Sheets



WHY USE A CONSULTANT OR A CONSULTING FIRM?

If you have determined that you need to hire the services of a consultant to assist you with occupational health and safety (OH&S) program or compliance requirements, there are some things you should consider. Health and safety consultants offer a wide range of services. On an as needed or ongoing basis, they can help you with:

- Technical assessments and measurements – for example: noise monitoring, ergonomics, air sampling, indoor air quality (IAQ) issues, medical monitoring, etc.,
- Audits or assessments of your health and safety program (for compliance, audit to industry standards, as part of your internal program review, etc.), or
- Develop and implement policies, procedures, and program elements.

How do I identify the scope of work?

If you are unsure what you need, consultants can work with you and provide assistance to determine what work needs to be done. A scope of work document is valuable because it describes how the expected outcomes (deliverables) will be achieved and in what timeframe. It is important to reach a scope of work that is agreed upon by both the client and the consultant. The scope of work should:

- outline the consultant's duties and authority,
- clarify any procedural expectations by the client (for example: how a consultant will access the work site, read records, or conduct research with workers),
- outline how much work will be done in terms of the various aspects of the issue/problem/project/etc.,
- list any requirements for final reports or any restrictions on developing recommendations, and
- outline steps to be taken to ensure confidentiality, payment terms, termination clauses, etc.

How do I determine if the consultant has the required credentials, education, skills, and experience?

Understanding credentials

As stated by the Canadian Society of Safety Engineering (2015): "In Canada and other countries, the terms "certification" and "designation" are often used interchangeably when referring to an individual's qualifications in occupational health and safety. There are numerous certifications and designations currently available for OH&S

practitioners to earn. In general, qualifications of this type serve to confirm that, based upon an assessment process, the individual has demonstrated they have met an established standard for the knowledge, skills, and abilities for which they have been evaluated. These qualifications are available for health and safety "general practitioners", as well as those who specialize in a particular industry (e.g., construction) or a specific area of practice (e.g., occupational hygiene or ergonomics)."

Contact the association that grants the credential for more specific information (see last question in this document).

Verifying relevant experience or qualifications

It is also important to confirm experience, request samples of work, and check references. Talking with previous clients and verifying the consultant's competence, professionalism, and ability to deliver results can provide reassurance that you have selected the right service provider.

You may also need to perform verification of qualifications (licenses, degrees, certificates, etc.). For example, many jurisdictions require various types of assessments be carried out by a professional engineer, qualified person, or competent person. In order to satisfy your legal obligations as an employer, you may be called on to demonstrate through records that someone acting on your behalf in this capacity is adequately qualified or competent. Therefore, request and maintain records and keep documentation of the person's qualifications, their resume, and verified references. A professional should not be offended by this request and should willingly provide the documentation supporting their experience or credentials.

What are sample questions I can ask the consultant or when talking to their previous clients?

Sample questions to ask the consultant or a previous client may include:

1. Were deadlines met?
2. Were there overruns on cost?
3. Was the consultant's analysis of the problem accurate?
4. Did they offer constructive recommendations?
5. How well did he/she interact with the company's staff?
6. Who did the work? Who was expected to do the work?
7. How well did the consultant prepare for and follow-up meetings?
8. What evaluation process was used?
9. How did they meet your reporting expectations?

Is a formal contract required?

A written contract is generally recommended. As with any other procurement process (for goods or services), a contract helps to clarify both parties' expectations up front and it can help resolve any disputes that may arise down the road. A poorly worded or vague contract is of little value; therefore, after drafting a contract for services, it is a good idea to have it reviewed by someone with experience in this area. Both parties should sign and date the contract and keep their own copies.

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