

# Template 1: Designing the Project Brief for Hiring Consultants

Performance Criteria	Rating					Considerations	Comments
	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know		
The project aims, objectives and expected deliverables are clearly stated in the brief						<ul style="list-style-type: none"> <li>Did the Client seek input to check that project aims, objectives and deliverables are clear in the brief?</li> </ul>	
Staff from all relevant departments, partner organisations, government agencies, and / or community representatives were involved in developing the brief.						<ul style="list-style-type: none"> <li>Were a range of the Client organisation's staff involved in developing the project brief, to build a clear set of aims, objectives and expected deliverables? This should include staff from various departments (e.g. asset management, land use planning, finance, governance, environment and sustainability).</li> <li>Were relevant external government agencies consulted when developing the brief? This will be important where the government agencies are providing financial assistance or may be expected to assist in implementing the project's outcomes.</li> <li>Did the Client consider consulting with key community groups / persons, to capture relevant community concerns in the brief?</li> <li>Were peer networks, colleagues etc with experience in climate change and adaptation projects consulted, to ensure the aims, deliverables etc. are adequate for such projects?</li> <li>The Client could consider establishing a Project Working Group, consisting of key staff from the Client's organisation, partner organisations, government agencies, and / or community groups as required.</li> </ul>	
<p>The scope of works is designed to allow flexibility and adaptability, should elements change during the course of the project. This is essential given the uncertainty associated with climate change science and adaptation planning.</p> <p><i>NB – the scope of works needs to be clear, but the methodology to achieve this can be left to the consultant, to demonstrate best practise or leading methodologies to achieve the scope within the budget.</i></p>						<ul style="list-style-type: none"> <li>Did the Client consider or include any of the following methods to introduce flexibility and adaptability into the project brief, particularly given the uncertainty associated with climate change and adaptation projects?                             <ul style="list-style-type: none"> <li>Pursuing a pilot project first, before designing a larger scope project;</li> <li>Specifying hold points with milestones, to be approved before undertaking the next stage;</li> <li>Breaking the project into smaller pieces that are undertaken individually. This would require a separate procurement process for each piece of work; or setting up a Panel of Providers of suitable consultants (see below);</li> <li>Set up a "Panel of Providers" of suitable consultants, via an initial expression of interest to check qualifications, experience and expertise, then engaging consultants (singly or to work together) as required for stages / segments of the project;</li> <li>Working to an upper limiting fee, to allow you and consultant to respond to changes as they arise during the project</li> <li>Separating the project area into smaller prioritised areas;</li> <li>Pursuing a data collation and review project, prior to designing the main project.</li> </ul> </li> </ul>	
The reporting requirements and intended audiences of the deliverables are clear (including reporting, presentations and other deliverables, and attitudes of local community and client's organisation towards climate change science and adaptation planning).						<ul style="list-style-type: none"> <li>Aside from key deliverables, a key acceptance criterion will be the quality of any reporting or presentations derived from the project. Have the expected audience for these deliverables been clearly outlined in the brief? For example, the brief may require the main report to be succinct and easily understood by the layperson, to have an executive summary, and technical details to be included in appendices.</li> <li>Has the client considered the organisation and community's attitudes towards climate change and adaptation projects when designing the deliverables?</li> </ul>	
The expectations and criteria for successful stakeholder and community engagement are outlined clearly (e.g. required outcomes from consultation, list of groups to be consulted, etc.)						<ul style="list-style-type: none"> <li>Are the groups to be consulted detailed, for example other departments from the client's organisation, government agencies, utilities, business / industry, developers, progress associations, chambers of commerce, tourism, community groups such as SLSCs, boardriders clubs, Dunecare, residents associations, local residents generally?</li> <li>Are the required outcomes from consultation clearly stated, or alternatively, the types of activities stated? Specifying the required outcomes (e.g. face-to-face consultation with local community, consultation across a range of demographic groups etc.) rather than the types of activities, requires the Consultant to demonstrate their skills in designing consultation plans, and potentially suggest new methods for the Client to consider (e.g. informal drop-in sessions instead of public meetings, use of social media to appeal to younger demographics etc.).</li> <li>Is the level of community experience / exposure to climate change / adaptation projects clear in the brief, as this may assist the Consultant to design an appropriate consultation program?</li> </ul>	

<p>Details to be provided by the Consultant to demonstrate their competency are clearly requested, including:</p> <ul style="list-style-type: none"> <li>• Examples of recent projects demonstrating up-to-date technical competence and knowledge in climate change/adaption science, local area knowledge, statutory context knowledge, community engagement skills and /or verbal / written communication skills;</li> <li>• Qualifications and contacts for key staff; and</li> <li>• Referees for recent projects.</li> </ul>						<ul style="list-style-type: none"> <li>• Does the brief clearly request details from the Consultant to demonstrate their competence, for example, a request for: <ul style="list-style-type: none"> <li>○ Recent projects demonstrating technical competence and up-to-date knowledge of climate change science and adaptation planning;</li> <li>○ Recent projects for similar organisations to the Client (e.g. local government), and in the local area;</li> <li>○ Recent projects demonstrating community engagement skills;</li> <li>○ Understanding of the local, state and federal statutory and policy context, and political appetite for climate change and adaptation projects;</li> <li>○ Referees for recent climate change / adaptation projects; and / or</li> <li>○ Key staff contacts and their responsibilities (particularly project manager and project director).</li> </ul> </li> <li>• If verbal communication skills are a key competency for the project, does the brief specify that an interview or presentation will be required from shortlisted consultants?</li> </ul>	
<p>The brief clearly states the officer from the Client's organisation who will lead the project.</p>						<ul style="list-style-type: none"> <li>• Is the Project Manager from the Client's organisation clearly identified in the project brief?</li> <li>• Have the contact details (email, phone number, address) for the Client's Project Manager / Officer been provided?</li> </ul>	
<p>Details for progress meetings (number, timing, format) and / or progress updates is stated in the project brief; or otherwise, the Consultant has been requested to detail progress meetings (number, timing, format) and progress updates (timing, format) in their submission.</p>						<ul style="list-style-type: none"> <li>• Are the number and indicative timing for meetings with the Consultant outlined in the brief? If not, has the Consultant been asked to indicate the number and timing for meetings they believe are necessary to the project?</li> <li>• Is the format of the meetings specified (face-to-face, teleconference), or otherwise has the Consultant been asked to specify this?</li> <li>• Are the expectations for project updates clearly stated? For example, updates to be provided by email fortnightly/monthly, and to include details of completion of each task, staff working on tasks, and any expected or current hurdles in completing tasks.</li> </ul>	
<p>Internal workshops, presentations or other activities to build the capacity and aptitude for climate change science and adaptation planning within the client's organisation are requested in the scope of works in the project brief.</p>						<ul style="list-style-type: none"> <li>• A key issue for many organisations is how to build their capacity and understanding of adaptation science and planning, when external consultants are required to conduct the work (e.g. due to their technical expertise, or staff under-resourcing).</li> <li>• Has the brief detailed in the Consultants scope of works, tasks that will help the organisation to learn from project outcomes, and build their understanding of adaptation science planning? For example, the brief could require the Consultant to: <ul style="list-style-type: none"> <li>○ Conduct workshops with varied groups in the organisation, at the commencement and / or closure of the project;</li> <li>○ Give presentation to update relevant departments with findings as the project progresses.</li> </ul> </li> </ul>	