Template 2: Desirable Skills of the Consultant and Client

Performance Criteria	Rating					Considerations	Comments
Desirable Skills of the Consultant. The Consultant is…	**Strongly Agree**	**Agree**	**Disagree**	**Strongly Disagree**	**Don't Know**		
• Highly technically competent; • Able to provide guidance on scenarios and data						• *Has Council checked details of the Consultants previous work experience, requested during the project brief, e.g. recent relevant climate change or adaptation project examples, referees etc.?* • *Check whether the person being interviewed will be the person undertaking the work.*	
Trustworthy and credible						• *Has the Client checked the Consultant's referee, to discuss their trustworthiness and credibility in climate change and adaptation projects?*	
Knowledgeable about the latest methods and able to benchmark best practise approaches						• *Has the Client undertaken the checks noted above for previous project experience and capabilities?* • *Has the Client communicated verbally with the Consultant, to gauge their understanding of the latest methods and best practice approaches for climate change vulnerability and / or adaptation planning projects?*	
Able to translate the climate science for 'lay people', and engage the audience (not just communicate)						• *Has the Client considered interviewing or requesting a presentation from key Consultancy staff, to gauge communication skills particularly regarding climate change science and / or adaptation planning principles or approaches?* • *Has the client undertaken the checks noted above?*	
Able to provide clear, concise, defensible and practical outputs and recommendations						• *Has the Client accessed existing climate change or adaptation reports completed by the Consultant (either from examples provided by the consultant or as available online?*	
Knowledgeable about the legislation context and project context						• *Has the Consultant demonstrated knowledge of the planning and policy context for your project? Evidence of this can be requested from the Consultant in the project brief.*	
Understanding of local government culture and service delivery role						• *Has the Consultant worked for local government before? Evidence of this can be requested through the project brief.*	
• Able to take on 'layperson' advice (e.g. 'local knowledge' from residents who have lived in an area for many years) • Understanding and empathetic towards the community affected						• *Has the Consultant demonstrated experience in working with local communities, particularly in the field of climate change science and adaptation planning (as such projects can be highly uncertain, contentious, and 'new territory' for most local communities)?*	
Willing to share knowledge / data with the client, and with other consultants						• *Has the Client requested in the scope of works for the Consultant to provide information / education opportunities to the Client's organisation?* • *Has the Consultant specified how they intend to share project outcomes and lessons learnt with the Client's organisation?*	

Desirable Skills of the Consultant. The Consultant is..(contd)	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know		
• Appropriately resourced and skilled (e.g. staff, computing capability etc.) • Committing the staff who bid on the work to do the work						• *Has the Consultant clearly stated which staff will be working on the project (especially the Project Manager), and hours / percentage of time committed to the project for key staff members?* • *Have resumes and details of experience working on Climate Change / Adaptation projects for key staff been provided?* • *Have resumes been reviewed by the Client?*	
Multidisciplinary (within a single consultancy, or a consortium of consultancies)						• *Does the study team proposed by the Consultant cover all of the areas of expertise needed to successfully complete the project? The study team may comprise of a single consultancy, or a team of consultancies, with lead and sub-consultants.*	
Able to provide a fixed quote for a known scope of works (and not constantly requesting variations), or otherwise willing to provide flexibility in their quote.						• *In reviewing the Consultants proposal against their budget: does the detail in methodology match the proposed budget? Is it likely that the Consultant can complete the methodology for the budget they have proposed? Is more detail on the methodology required, to ensure that all tasks / elements required by the Client are included in the Consultant's proposal, so that there is less chance for the Consultant to request a variation(s), or otherwise result in a sub-standard outcome for the Client.*	
Desirable Skill of the Client. The Client is…	**Strongly Agree**	**Agree**	**Disagree**	**Strongly Disagree**	**Don't Know**		
Clear about the objectives and desired outcomes for the project.						• *Is the Client clear about key outcomes for the project, even where they may need to be flexible about how to achieve this (methods, etc)? Consider contacting organisations that have undertaken similar work to discuss the proposed outcomes and whether these are realistic.* • *Is the Client realistic about what can be achieved within the political and cultural climate of the organisation and community? Most organisations and communities will need to build their acceptance of climate change science and corresponding adaptation capacity over time and through the course of a number of climate change / adaptation projects.*	
• Entrepreneurial: doing a lot with a little. • Realistic about scope and budget balance (i.e. not expecting too much for too little), or otherwise able to request flexibility or seek assistance to set their brief.						• *Is the Client prepared to negotiate and compromise to achieve the best possible outcome within the constraints of the budget, organisation, available data and methods, etc.?* • *Is the Client willing to take advice from the Consultant, peer organisations, colleagues, etc., to achieve the above?*	
• Able to provide a window into and interface for the organisation, e.g. explain views and concerns of senior management, provide insight into the culture and how the organisation operates etc. for the external consultant. • Able to translate the views of the community and elected representatives.						• *Is the Client aware of their organisational and community culture, which will drive their ability to acknowledge, accept and contribute to climate change and adaptation projects? As noted above, as the organisation / community embark on such projects, their climate change acceptance and adaptation capacity will progress.* • *Is the Client able to communicate the organisation and communities adaptive capacity to the Consultant, such that both can tailor project outcomes and recommendations accordingly?*	
Appropriately resourced and skilled (e.g. committing sufficient staff time to manage the project).						• *Has the Client's organisation allocated sufficient time for the Client's Project Manager to complete the project?* • *Has the Client's organisation made it clear to other staff that they may be required to give input to the project, as appropriate?*	
Willing to approach peer organisations (e.g. other local government officers, state agency staff, pea industry bodies) for advice (examples, templates) for setting briefs, running projects, finding suitable consultants etc.						• *Has the Client a suitable network of peers that they can approach for advice, assistance, if required?* • *If not, is the Client researching and pursuing potential networks, such as through web searches, university searches, supporting state agencies, etc.?*	

Desirable Skill of the Client. The Client is…(contd)	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know		
Knowledgeable about who holds data and expertise						• Has the Client consulted with peer organisations, supporting organisations (e.g. state agencies) etc. regarding the type of data required and its availability to complete the projects? • If data availability / suitability is unclear, has the Client allowed for a data search and review as part of the project scope of works (given in the project brief)?	
Willing to share their skills and experience between staff local government organisations.						• Is the Client prepared to offer their advice and experiences to their peer networks and other staff in their organisation?	
A conduit for project information between consultant and project partners / stakeholders (e.g. act as a share point or set up a webpage, to disseminate details such as project aims, program of deliverables, who is involved at what stages, uploads of drafts, final outputs).						• Has the Client considered and prepared a process for sharing project information with relevant parties during the project, e.g. is a detailed website / web portal required, or can a simpler process (e.g. regular email updates) suffice, depending on the scale of the project?	
Skills needed by both the Client and The Consultant	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know		
Flexible: able to respond and contribute to changes needed in project scope, rather than being fixed on the project brief or winning proposal.						• Both the Client and the Consultant need to be willing to adapt to changes as the project progresses. This can be facilitated through: o Good communication between the Client and Consultant; o Flexibility built into the project brief (e.g. hold points, agreement on upper limiting fee instead of set proposal and budget, consortium of consultants, etc., as described in Template 1 etc.); o Realistic expectations of project deliverables within the available budget, available data, community / organizational culture, etc. o Able to draw on advice from peer networks, colleagues, where problems arise.	
Versatile and agile: able to adapt methods, skills and knowledge to new situations and contexts.						• As above	
Able to take constructive comment						• This skill may not be known prior to the project, but can be encouraged through good, regular communication as the project progresses by both the Client and Consultant. Regular communication shall aim to make issues known promptly, and avoid decisions being made by either party that later require a major change in project direction late in the project.	
Communicating with each other throughout the project to respond to issues promptly						• Is the process for communication and updates clear to both parties? • Is there a commitment to availability to the project by both the Client and Consultant?	
Communicating with key staff in their own and partner / stakeholder organisations through the project						• Have both the Client and the Consultant good peer networks, to draw from should problems arise?	