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MISSISSIPPI  
WATERSHED  
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## STEWARDSHIP FUND PROGRAM

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### BEST PRACTICES FOR WORKING WITH CONSULTANTS AND CONTRACTORS

#### Hiring a Consultant or Contractor

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- Determine your budget and price range and make that clear to potential consultants or contractors when soliciting quotes.
- In the Request for Proposals (RFP), describe *in detail*:
  1. The problem or issue to be addressed and the type(s) of services you are seeking: for example, development of a stormwater management plan with input from the community, creation of technical designs (indicate preliminary or construction-ready) for a specific stormwater best management practice (BMP), site and BMP maintenance plans, excavation work for a raingarden, site grading, construction and installation of a stormwater BMP, or implementation of a BMP and site maintenance plan.
  2. The desired outcomes of the service(s) provided, such as concept plans and a work plan for long term stormwater management, construction-ready designs accompanied by a detailed project budget, work plan, and maintenance plans, or long term successful function of an installed BMP.
  3. The budget available for the project.
- Gather information for comparable products or services. (*Solicit proposals from at least three potential consultants or contractors.*)
- Choose the *lowest responsible proposal*. The lowest responsible proposal does not always have the lowest price, but is the proposal that both has the lowest price *and* illustrates the consultant or contractor's capability to satisfactorily complete the project.

Examples of reasons to exclude a proposal:

1. Lack of equipment to properly complete the project
2. Failure to produce a certificate of insurance or proper exemption
3. Failure to address all required specifications in the solicitation document
4. Materials/service proposed does not meet specifications
5. Lack of financial resources or organizational capacity to complete the project
6. Poor performance on a prior contract

- Gather background information on the selected consultant or contractor including references and information about similar projects done by the consultant or contractor.
- Anticipate problems that may occur and ensure that the contract is written to provide what would happen if that problem did take place.
- Ensure that there is contractual language that will protect your organization's interests if there is a breach of duty by the consultant or contractor, or where the consultant or contractor cannot perform.

## **Working with a Consultant or Contractor**

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- Avoid future problems by strengthening the consultant or contractor relationship with a planning meeting after awarding the contract.
- Create a point of contact to help open the lines of communication so that any potential questions do not become future problems.
- Create a mutual understanding of the expectations and responsibilities of all parties involved up front.
- Establish a good relationship with the consultant or contractor to ensure accountability. A relationship in which the expectations are clearly defined and where there is frequent communication will yield the most satisfaction for both parties.
- Create a project timeline with clearly identified and logical milestones.
- Establish monitoring procedures such as periodic contractor reports submitted by the consultant or contractor or inspections of completed work.
- Make partial payments based upon a prearranged schedule where payments are made when specific milestones are reached or at pre-specified intervals after work has been verified.
- In wrapping up the project, measure the success or failure of the final results against the initial objectives. Review the project file to ensure that it contains sufficient documentation to answer any questions that may arise, or to provide guidance on any similar projects that may be completed in the future. The project file should contain the following:
  - ✓ Copy of the signed contract
  - ✓ Project plan
  - ✓ Consultant or contractor information
  - ✓ Project financials
  - ✓ Project management documentation
  - ✓ Final assessment of the project as a whole, including an assessment of the consultant or contractor's performance.