

Hiring a Consultant

Tips & Considerations



Preparation

- Understand the requirements of the project (contact SHPO)
- Have a clear & realistic vision of the project, the products, division of labor, and the timeline
- Consider the costs when establishing a budget
 - Call around for ballpark estimates
- Consider the type of professional needed
 - Archaeologist, Architectural Historian, Historian, Architect, etc.
 - SOI professional standards a requirement?
- Consider research & resources available to the consultant
 - Records: directories, subdivision plats, permits; GIS mapping

Further guidance: <https://mostateparks.com/page/84246/finding-and-hiring-consultant>



Consultants List

- List of archaeologists, historians, and architectural historians meeting Secretary of Interior's Professional Qualification Standards
- Based on an individual's resume/CV
- MBE/WBE
- Not comprehensive
- Use of list is optional
- Not an endorsement
- Not a guarantee of quality or qualifications

Website: https://mostateparks.com/sites/mostateparks/files/CRM_CONSULTANTS.pdf



Questions for SHPO

- Has the individual submitted this type of project in the past?
- Was it successful?
- How well does the individual follow directions/standards?
- Does the individual meet deadlines?
- How well does the individual address feedback?
- How responsive is the individual?



General Considerations

- The further away a project is from the consultant the higher the cost
- Shorter project timeframes are more expensive and/or unattractive to consultants
- Project costs have risen over the last decade
- Digital products are less costly than hard copy
- Virtual public meetings are less costly than in-person



NR & Architectural Survey Considerations

- More primary buildings, the higher the cost
- More research required, the higher the cost
 - Intensive level survey is more expensive than reconnaissance
 - Amount of research required for a NR nomination will vary depending on the criteria, criteria considerations, and level of significance.
- National Register nominations are dictated by set schedules
- Has the consultant successfully completed similar projects in Missouri?
 - For out of state, contact that state's SHPO
- Is the consultant familiar with standards and guidance?
 - NR: state & federal standards, bulletins, MO NR Guide
 - Survey: state standards, forms, instructions
- Adequate time must be spent on-site & for local research



Section 106 Considerations

- Check with the lead federal agency and see who they recommend to hire or avoid
- Be aware that some tribal nations such as the Osage Nation maintain lists of preferred and not preferred consultants. They will often not accept reports submitted by consultants on their not preferred list
- Check consultants' vitae for evidence that they have received specialized training in Section 106 given by reputable organizations such as SHPOs, the Advisory Council on Historic Preservation, or the National Preservation Institute
- When seeking a consultant to assist with mitigation of an adverse effect, copy the mitigation stipulations directly from the agreement document into your Request for Proposals (RFP).



Historic Tax Credit Considerations

- Inquire if the consultant works primarily with commercial or residential properties.
- Although HTC consultants do not have to be licensed or certified, it is advised to inquire about the consultant's education, training, continuing education and possible Secretary of the Interior certification.
- Confirm if the consultant will be responsible for advising, completing, submitting applications and regularly monitoring the project for all components of the process, including amendments, throughout the life of the project.
- Secure in the written contract who is responsible for informing the architects, general contractors, and subcontractors of the approved written scope of work in the historic credit applications, and how that information will be delivered to the responsible parties.
- Request to be copied on any SHPO comments to the consultant, and attend meetings between the consultant and SHPO. Stay involved!



Tips

- Cast a wide, but appropriate, net when sending RFQ/RFPs
- Talk to your fellow CLGs
- Don't be afraid to ask questions about CVs/proposals
- Ensure products are inline with the project
- Clarify if they will take responsibility for revisions
- For companies, confirm who is doing what and that they meet any required qualifications
- Ensure their deadlines are inline with the project deadlines
 - Do they allow time for you to review the project?



Tips (cont.)

- Ask the consultant to put it in writing/contact what they will be responsible for vs. the client
- Verify the communication format (email, phone, etc.)
- Look for evidence of continuing education within the last year
- Ask the consultant how often projects are sent back or put on hold
 - The SHPO might be able to answer this question, depending on the project
- Stay involved!
 - Request to be copied on any SHPO comments to the consultant
 - Stay on top of deadlines
 - Consider if the products should go to you prior to the SHPO



Potential Red Flags

- Substantially under-bidding compared to average cost
- Bidding on multiple/large projects with limited staff
- References/links do not reflect project type
- Generalized response vs. specific to your project
- Does not appear to understand the project requirements
- Errors (wrong city/project type)
- Claiming not to have access or know how to use to common research collections or basic technology/software
- Unrealistic timelines/overpromising
- “Shady” behavior
 - Going around appropriate parties, attempting to circumvent processes, frequent emergencies/excuses, unprofessional behavior, inappropriate requests, etc.



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SHPO: <https://mostateparks.com/page/84371/state-historic-preservation-office>

Phone: 573-751-7858

