



Administrative Policy Manual
Code: AU Human Resources

AU0400 – EXTERNAL CONSULTANTS, USE OF

1.0 PURPOSE

To ensure the appropriateness of the initiative and consistency in philosophy, expertise, qualifications and fee schedule when contracting with external consultants.

2.0 DEFINITIONS

TERM	DEFINITION
Organization Development	Series of planned processes to facilitate healthy inter- and intra-unit relations and the competencies and confidence of groups to initiate and manage change.
Human Resource Development	Planned learning experiences designed to bring about the possibility of performance improvement and/or personal growth.

3.0 POLICY

Interior Health recognizes the need and the value in utilizing the unique knowledge, skills and expertise of external resources/consultants to address specific business needs from time-to-time. The contracting of external resources for the purposes of Organization Development, Human Resources Development, and other strategic Human Resources management initiatives, will be approved in consultation with Organization Development.

Line Managers are responsible for funding external consultations from their respective Cost Centres citing EOC 6509000 (Other Professional Fees).

4.0 PROCEDURE

Line Management will consult with the Consultant when considering the utilization of an external resource/consultant. The Consultant will:

- a) Clarify the issues/needs with the line manager
- b) Determine the appropriateness of the use of an external consultant in consultation with Senior Management, HR Consultants, and HR Directors, etc. as needed
- c) Complete the *Request for an External Consultant (Appendix A)* form in consultation with the Line Manager;
- d) Approve external resources/consultants;
- e) Negotiate, finalize and track fee schedules and deliverables/outcomes outlined in the *Proposal(Appendix B)*;
- f) Formalize the agreed terms and conditions of the *Contract* in writing; and
- g) Secure approval as per Interior Health's [Signing Authority Policy](#) including the Vice President, People and Clinical Services for the *Proposal* and *Contract*.

5.0 REFERENCES

1. [Interior Health Policy AE0100 Signing Authority](#)

Policy Sponsor: VP Human Resources	1 of 5
Policy Steward: VP Human Resources	
Date Approved: May 2005	Date(s) Reviewed(r)/Revised(R): February 2019 (r)



Administrative Policy Manual
Code: AU Human Resources

AU0400 – EXTERNAL CONSULTANTS, USE OF

**Appendix A
REQUEST FOR AN EXTERNAL CONSULTANT
ORGANIZATION DEVELOPMENT**

Organization Development will clarify the issues/needs with the line manager in consultation with Senior Management, HR Consultants, and HR Directors as needed. The completed Request for an External Consultant Organization Development will be submitted to the Leader, Organization Development.

Date	
Business Partner – Organization Development	
Line Manager Contact	
Involved Internal Resources	
Issue Identification <ul style="list-style-type: none"> • What are the issues? • What are the specific behaviours? • What data supports this issue identification? 	
Actions taken to Date <ul style="list-style-type: none"> • What, if anything, has been done to date to manage these issues? 	
Scope of Work <ul style="list-style-type: none"> • Who and how many will be included in this project? • What individuals, teams, departments are included? 	
Desired Outcomes and Evaluation <ul style="list-style-type: none"> • What are desired outcomes? • What performance indicators will be used to measure success? 	
Estimated Time Schedules <ul style="list-style-type: none"> • How long do you estimate this intervention will take? • What stages will the intervention take? 	

Policy Sponsor: VP Human Resources	2 of 5
Policy Steward: VP Human Resources	
Date Approved: May 2005	Date(s) Reviewed(r)/Revised(R): February 2019 (r)



Administrative Policy Manual
Code: AU Human Resources

AU0400 – EXTERNAL CONSULTANTS, USE OF

Type of Service Offering <ul style="list-style-type: none"> Facilitation Mediation Coaching Training 	
Name and Role(s) of Proposed External Service Provider <ul style="list-style-type: none"> What role(s) are expected from the External Consultant? 	
Roles of Interior Health Personnel <ul style="list-style-type: none"> What role(s) are expected from Organization Development, Human Resources, Line Management, etc.? 	
Funding Source <ul style="list-style-type: none"> Cost Centre (EOC 6509000) 	

RECOMMENDATION:

Manager

Date

Leader, Organization Development

Date

APPROVAL:

Vice President, People and Clinical Services

Date

Return to Organization Development

Policy Sponsor: VP Human Resources	3 of 5
Policy Steward: VP Human Resources	
Date Approved: May 2005	Date(s) Reviewed(r)/Revised(R): February 2019 (r)



Administrative Policy Manual
Code: AU Human Resources

AU0400 – EXTERNAL CONSULTANTS, USE OF

Appendix B PROPOSAL FOR CONSULTING SERVICES ORGANIZATION DEVELOPMENT/EMPLOYEE DEVELOPMENT

This document outlines the content of the written proposal to be submitted by an External Consultant.

The Consultant agrees to provide Interior Health with the following information regarding the consultation to be undertaken for Interior Health. This information will be provided within ten (10) business days after the initial consultation meeting.

Approval of this submission, as outlined in Interior Health's policy *Use of Consultants - Human Resources and Organization Development*, is required before entering into a contractual relationship with Interior Health and is a condition for proceeding. Before commencement of services, signed Contract and Confidentiality Statement are also required.

1. Overview of the Services to be Provided

2. Location

3. Sponsoring Manager

4. Boundaries of Analysis

Outline the focus of the project and what groups, teams, or departments will be included in the analysis.

5. The Project's Objectives

What outcomes does the Consultant expect to achieve in the scope of the project: specifically, indicate what will be achieved or what differences will be measurable.

6. The Type of Information Collected

Specify the types of data collected and the method used to collect the data.

7. The Final Product

Describe the final product delivered and whether the results will be presented verbally, in addition to the required report format. Identify those people who will receive the report.

8. The Consultant's Role in the Project

Outline the specific expectations for interacting with the client(s), including a description of the Consultant's role and responsibilities towards the client(s) in the project.

9. The Support and Involvement Needed from the Client(s)

Specify the Consultant's needs from the client(s) e.g. administrative assistance in setting up interviews or distributing questionnaires.

10. Time Schedule

Policy Sponsor: VP Human Resources	4 of 5
Policy Steward: VP Human Resources	
Date Approved: May 2005	Date(s) Reviewed(r)/Revised(R): February 2019 (r)



Administrative Policy Manual
Code: AU Human Resources

AU0400 – EXTERNAL CONSULTANTS, USE OF

Include starting dates, intermediate milestones and projected completion dates.

11. Confidentiality

Identify those people within the organization to whom the data will be made available and in what format. Interior Health confidential requirements are outlined in the attached *Confidentiality Policy*.

12. Evaluation

Specify the evaluation methods used to ensure the work has been successful, including specific performance indicators, tools, and methods for data collection and analysis.

13. Fees

Outline the entire project fee and specify to which services, actions, and reports the various portions of the fee apply.

Should the condition of engagement for a specific project change during the course of the project, it is the responsibility of the Consultant to provide to Interior Health, in writing, such changes. Acceptance of the proposed change(s) by the CHRO and sponsoring manager is required prior to proceeding with the change(s).



Submitted by:

Consultant(s)

Date

Accepted by:

Sponsoring Manager

Date

Approval:

Vice President, Human Resources

Date

Please return to Chief Human Resource Officer, Interior Health

Policy Sponsor: VP Human Resources		5 of 5
Policy Steward: VP Human Resources		
Date Approved: May 2005	Date(s) Reviewed(r)/Revised(R): February 2019 (r)	