

Selecting “External/Outside” Consultants Guidance-Checklist

Procurement Standards- 2 CFR Part 200

[Sec 200.318 to Sec 200.327](#)

[ESSA Statute- Section 1003](#)

“use a rigorous review process to recruit, screen, select, and evaluate any external partners with whom the local educational agency will partner.” (e)(1)(D)

Selection Protocol:

1. Follow SAU Procurement policies
2. **Recruit**-Research potential consultants
 - a. Used different resources to research consultants
 - b. Evaluate qualifications and expertise
 - c. Certifications and/or credentials that demonstrate their expertise
 - d. Review testimonials and case studies to gauge their track records of success
3. **Screen**-Interviewing Potential Consultants
 - a. Prepare list of questions to ask during the interview
 - i. Experience and Expertise
 - ii. Approach to consulting
 - iii. Track record of success
 - iv. Communication style and rapport
 - b. Interview Potential Consultants
4. **Screen**-Review proposals and plan for addressing school's needs
 - a. Alignment with school's area of need, SMART goals, resource inequities, and actions steps
 - b. Feasibility of plan
5. **Screen**-Check References and credentials
 - a. Due Diligence to ensure that consultant is qualified, reputable and will deliver results
 - b. Verify any qualifications or certifications that consultant claims to have
6. **Select**-Finalize Agreement
 - a. Terms and conditions
 - b. Roles and Responsibilities
 - c. Communication channels
 - d. Deliverables
 - e. Evaluation-how will the consultant be evaluated
 - i. Metrics for evaluating the effectiveness of the consultant's work.
 - ii. Clear and concise outcomes
 - f. Contract is Signed and Dated (within period of grant obligation and “Substantial Approval”)
7. **Evaluate**-Develop Evaluation process
 - i. Timeline
 - ii. Degree to which consultant's work met goal(s) set forth in contract and school improvement plan
 - iii. Degree to which results were achieved

Consultant Checklist -Using ESSA Section 1003 (SIG) Funds

School Name	Funding Year	SAU Name
SAU Procurement Policy	Yes/No	Evidence or Description
Meets 2 CFR 200.318 to 200.327		
SAU Procurement Policies are uploaded to applicable SIG application(s)		
Followed SAU Procurement Policy related to contracting with “outside/external” consultants		
Recruit	Yes/No	Evidence or Description
Researched Consultants that aligned with school- action steps, SMART goals, and identified resource inequities		
Used a variety of resources to conduct research		
Reviewed expertise, qualifications, certifications, and credentials		
Used reviews, testimonials, and case students to conduct research		
Followed 2 CFR Part 200 and SAU Procurement Policy		
Screen	Yes/No	Evidence or Description
Developed interview questions that align to needs of schools as expressed in CNA/SWP and SIG applications		
Interviewed		
Review proposals and plans submitted by potential consultants for feasibility and alignment to school needs		
Check references including credentials, qualifications and track record of success		
Followed 2 CFR Part 200 and SAU		

Procurement Policy		
Select	Yes/No	Evidence or Description
Contract includes all elements required in ESSA Statute and 2 CFR Part 200		
How consultant will be evaluated is discussed and available in written format; attachment to contract		
Copy of Unsigned Contract- for “Grant Approval”		
Copy of Signed Contract for “invoicing”		
Followed 2 CFR Part 200 and SAU Procurement Policy		
Evaluation Plan	Yes/No	Evidence or Description
Timeline		
Degree (including specific metrics) to which consultant’s work will meet goal(s) set forth in contract and school improvement plan		
Degree (including specific metrics) to which results/goals will be achieved		
Degree including specific metrics) to how identified needs will be addressed through the consultant’s work with the school		
Followed 2 CFR Part 200 and SAU Procurement Policy		

Required Signatures	
Superintendent’s Name	Principal’s Name
Superintendent’s Signature	Principal’s Signature
Date:	Date:

Post/End of Contract Evaluation		
Completed by:		Date:
Deliverables/Goals	Met Yes/No	Evidence that supports the “Met” response
Final Comments and Next Steps		
		Timeline:

Required Signatures	
Superintendent’s Name	Principal’s Name
Superintendent’s Signature	Principal's Signature
Date	Date

Sample Questions for Consultant:

1. Do you have empirical evidence that what you do actually works?
2. Do you have a systematic implementation process based on implementation science and change management practices?
3. Do you have experience and expertise with ...fill in the area of expertise sought?
4. Do you align your work with the most effective teaching and learning strategies and practices? What are some examples?
5. What baseline data do you collect, and what is your process of analyzing it?
6. How do you measure the effectiveness of your work? Metrics?
7. A question about the content area...what strategies are evidence based that you will emphasize.

Resources:

<https://www.icsequity.org/wp-content/uploads/2024/02/educational-consultant-hiring-scorecard-school-district-leaders.pdf>

Sample Evaluation Survey

Narrow focus Focused on a specific problem or set of students		Comprehensive Focused on comprehensive, systemic change
New methods Experimental or new process that has yet to be proven		Proven Process Pragmatic and structured implementation process backed by implementation science.
Excludes most students Focus on small subset of students or single student identity		Inclusive Goal is for all students' achievement and behavioral outcomes to improve
Deficit-Based Pinpoints and fixes perceived deficits in students and families		Assets-Based Proactive and assets-based formula to fix system, not people
Short-term work Short-term, one-off sessions or workshops available to only a small segment of school leaders or staff		Long-term Approach Long-term integrated approach with train-the-trainer sessions so your staff can implement the work and train others
Relies on outside consultants Relies on outside "experts" to deliver the training		Develops internal capacity Develops educator capacity within the district leadership team and school leadership teams to lead the work with their colleagues
No measurable outcomes No measurable impact, results or outcomes on student success		Measurable Outcomes Proven results with process to analyze data, monitor progress over time and measure effectiveness



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