

Health and Safety Programs

Selecting and Hiring a Health and Safety Consultant

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Why use a consultant or a consulting firm?

If you have determined that you need to hire the services of a consultant to assist you with your occupational health and safety program or compliance requirements, there are some things you should consider. Health and safety consultants offer a wide range of services. On an as-needed or ongoing basis, they can help you with:

- Technical assessments and measurements (for example, noise monitoring, ergonomics, air sampling, indoor air quality (IAQ) issues, or medical monitoring).
- Audits or assessments of your health and safety program (for example, to establish compliance with legal requirements and standards, or as part of your internal program review).
- Development and implementation of policies, procedures, and program elements.

Does CCOHS offer occupational health and safety consulting services?

No. CCOHS does not offer consulting services. See the final question below on how to find an occupational health and safety consultant.

How do I identify the scope of work?

If you are unsure what you need, consultants can work with you and provide assistance to determine what work needs to be done. A scope of work document is valuable because it describes how the expected outcomes (deliverables) will be achieved and in what timeframe. It is important to reach a scope of work that is agreed upon by both the client and the consultant. The scope of work should:

- Outline the consultant's duties and authority.
 - Clarify any procedural expectations by the client (for example, how a consultant will access the work site, read records, or conduct research with workers).
 - Outline how much work will be done in terms of the various aspects of the project.
 - List any requirements for final reports or any restrictions on developing recommendations.
 - Outline steps to be taken to ensure confidentiality, payment terms, termination clauses, and other important considerations.
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How do I determine if the consultant has the required credentials, education, skills, and experience?

Understanding credentials

As stated by the Canadian Society of Safety Engineering (2018): "In Canada and other countries, the terms "certification" and "designation" are often used interchangeably when referring to an individual's qualifications in occupational health and safety. There are numerous certifications and designations currently available for occupational health and safety practitioners to earn. In general, qualifications of this type serve to confirm that, based upon an assessment process, the individual has demonstrated they have met an established standard for the knowledge, skills, and abilities for which they have been evaluated. Some of these qualifications are intended for "general practitioners", while others are designed for those who specialize in a particular industry, like construction, or specific area of practice such as auditing, ergonomics, occupational hygiene, or process safety."

Contact the association that grants the credential for more specific information (see last question in this document).

Verifying relevant experience or qualifications

It is also important to confirm experience, request samples of work, and check references. Talking with previous clients and verifying the consultant's competence, professionalism, and ability to deliver results can provide reassurance that you have selected the right service provider.

You may also need to perform verification of qualifications (licenses, degrees, certificates, etc.). For example, many jurisdictions require that various types of assessments be carried out by a professional engineer, qualified person, or competent person. In order to satisfy your legal obligations as an employer, you may be called on to demonstrate through records that someone acting on your behalf in this capacity is adequately qualified or competent. Therefore, request and maintain records and keep documentation of the consultant's qualifications, their resume, and verified references. A professional should not be offended by this request and should willingly provide the documentation supporting their experience or credentials.

What insurance should a consultant have?

Insurance can help protect a company and a consultant in the event of financial loss. Some types of insurance you may choose to require from your consultant are:

- **General liability:** can cover damages to property that is the fault of the consultant, medical bills, and legal costs.
- **Workers' compensation:** provides coverage for the consultant and any of their employees in the event of injury or illness.
- **Professional liability:** useful in protecting the consultant in the event that they provide a service that results in a lawsuit.

Other types of insurance coverage may be obtained. Insurance may not be strictly required in all cases but can help offer protection from unforeseen events. It is typically a good idea for a consultant to at least have general liability and workers' compensation insurance. Verify that the consultant's insurance policies provide the type of coverage that you require.

What are sample questions I can ask the consultant or when talking to their previous clients?

Sample questions to ask the consultant may include:

1. What experience do you have with similar work?
2. What qualifications do you have that make you ideal for this project?

3. Would you be completing all of the work for the project, or are you only offering guidance?
4. What do you need from us (for example, records or staff to support the consultant)?
5. Do you plan to outsource the work?

Sample questions to ask previous clients may include:

1. Did the consultant meet your expectations?
2. Were deadlines met?
3. Were there overruns on cost?
4. Was the consultant's analysis of the problem accurate?
5. Did they offer constructive recommendations?
6. How well did they interact with the company's staff?
7. Who did the work? Who was expected to do the work?
8. How well did the consultant prepare for and follow up regarding meetings?
9. What evaluation process was used?

Is a formal contract required?

A written contract is generally recommended. As with any other procurement process (for goods or services), a contract helps to clarify both parties' expectations up front, and it can help resolve any disputes that may arise down the road. A poorly worded or vague contract is of little value. Therefore, after drafting a contract for services, it is a good idea to have it reviewed by someone with experience in this area. Both parties should sign and date the contract and keep their own copies.

Where do I look to find the right consultant for my needs?

Industry associations or credential-granting organizations may publish a list of members who offer services. Health and safety associations may also provide industry-specific consulting or services.

To locate consultants in your area use a search engine. Keywords include “occupational health and safety consultants.” You may wish to add your specific topics (e.g., indoor air quality) and location to help narrow the results.

Some organizations that provide certification or a list of professionals that offer services* include:

- [Board of Canadian Registered Safety Professionals](#) (CRSP certification)
- [Canadian Registration Board of Occupational Hygienists](#) (ROH/ROHT certification, and see consultant listing under Resources)
- [Health and Safety Professionals Canada](#) (CHSC certification)
- [Association of Canadian Ergonomists](#)
- [Occupational Hygiene Association of Ontario](#)
- [Board for Global EHS Credentialing](#) (CIH certification)
- [American Industrial Hygiene Association](#)

*We have mentioned these organizations or certifications as a means of providing a potentially useful referral. You should contact the organization(s) directly for more information about their services. Please note that mention of these organizations does not represent a recommendation or endorsement by CCOHS of these organizations over others of which you may be aware.

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