

Tool 3

Terms of reference and selection criteria for external experts

1 Defining the tasks and selecting external experts

If you have decided that you want to use an external expert to help you with your cooperation project then it is important both to define their tasks and specify the required skills and experience before you select such an expert.

1.1 Specification of the expert and tasks

An external expert does not necessarily have to be a professional consultant. Rural areas often have local actors who can provide the necessary informed but objective view. Such a person would normally already have a good knowledge of the local area, its local actors, challenges and opportunities. Their local knowledge may make the facilitation tasks easier and smoother.

Choosing an external expert involves specifying a terms of reference (ToR), drawn up in accordance with the project specifications. This ToR may include the following:

- The general context of the expert's tasks:
 - The purpose of the specific task/mission;
 - The context in terms of the project, the areas and the various partners;
 - What the project is and at what stage of definition and development it is at.
- The recommended approach:
 - Any preferred or essential working methods specified by the project partners (e.g. participatory methods);
 - The involvement of partner organisations and any organisational approach to be employed.
- The objectives of the expert's tasks:
 - What the expected outcomes of the task allocated to the expert are;
 - How the expert can contribute to the overall project design and implementation;
 - What the most important factors are that should be given priority.
- Proposal, timetable and report:
 - Duration and budget (optional) of commission;
 - Starting and finishing dates and any intermediate milestones;
 - Type of outputs / reports expected, formats etc;
 - Required elements of the expert's proposal to undertake the work.

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1.2 Selecting external experts

It may be useful to identify potential experts by consulting other LEADER groups (including project partners) who either have good operators capable of carrying out the mission or know consultants or experts specialised in these subjects. The following tables can be used to support the selection of external experts and their proposals, these are generic suggestions and can be amended to suit your own specification.

<i>The Consultant</i>						
<i>Criteria</i>	<i>Evaluation, ranking from 1 (weak) to 5 (good)</i>					<i>Comments</i>
	<i>1</i>	<i>2</i>	<i>3</i>	<i>4</i>	<i>5</i>	
Professional references						
Professional quality/experience of Consultant(s):						
Ability to communicate effectively						
Appropriate level of professional knowledge and skills						
Specific and relevant knowledge of the cooperation theme						
Knowledge of languages of the partners						
Knowledge and experience of local development						
Experience in transnational cooperation						

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<i>The Proposal</i>						
<i>Criteria</i>	<i>Evaluation, ranking from 1 (weak) to 5 (good)</i>					<i>Comments</i>
	1	2	3	4	5	
Evidence of understanding of requirements and tasks						
Realism, clarity and appropriateness of methodology proposed						
Assistance proposed in preparatory phase						
Assistance proposed in implementation phase						
Monitoring support						
Resources allocated to project support						
Specific knowledge of the cooperation theme						
Risk assessment, problem solving and management						
Communication with project management						
Reporting						
Price / Value for money						