

Bank of Expertise Guidance Notes

The Bank of Expertise has been set up to help third sector organisations to find specialist advisers. Any organisation or individual offering services around capital development can apply to **Join the Bank of Expertise**. The application asks in particular for information about working with third sector organisations and references must also be provided. PLEASE NOTE THAT INCLUSION ON THE BANK OF EXPERTISE DATABASE DOES NOT INDICATE A RECOMMENDATION FROM PLACES FOR EVERYONE.

The Places for Everyone Bank of Expertise is mainly aimed at organisations at an early stage of capital development perhaps needing one or two days of specialist support to deal with a specific issue. There is guidance for organisations seeking to recruit an adviser from the Bank of Expertise in the **Process** section below.

We appreciate that many organisations on the Bank of Expertise will be able to offer services at all stages of capital development. Within the guidance we have indicated that appointing advisers for a full capital development project is likely to require a more formal process and have referred to: [To Have and To Hold](#) or [So You Want to Build a House](#).

A key element of the Places for Everyone programme is that third sector organisations will build their confidence and expertise at working with specialist advisers. Consequently, our guidance suggests that organisations ring advisers and discuss their requirements. It also suggests that they ask the adviser for contact details for clients they can contact to check out whether they would be suitable. Any contract will be between the third sector organisation and the adviser.

Process

Organisations and advisers are different – a relationship which works well for one organisation will not necessarily suit another. Places for Everyone has put together some brief guidance for organisations seeking to use an adviser from the Bank of Expertise.

- Be clear about what you need. If you are part of the Places for Everyone programme, your Case Manager will help you to do this. Broadly advisers will do what you ask them to do – so it is very important to set out exactly what you want.
- Look at the Bank of Expertise and identify some appropriate advisers. Ring more than one. Professional advisers – e.g. architects, solicitors etc. – should be suitably qualified. For third sector organisations offering mentoring, business planning advice, etc., it may be more appropriate to look at their previous experience and references.
- Contact the adviser and discuss your requirements with them. Ask them to refer you to named contacts of clients they have worked with previously.

- You may wish to tender the work. For some organisations this is a requirement – so check out any procurement policies or procedures around using external consultants – and the terms and conditions of any funding for the project. Or, if your organisational policies and funding allow, you may just select a specific advisor.
- If you decide to tender, you should select a number of appropriate advisors and send them a written brief setting out what you want done and being clear about timescales. To decide between the different proposals ask both factual questions (what will it cost?, how will you do it?) and questions about ethos (what is your approach?, how could our Board be involved in the work?). It is usual for two or more people within your organisation to score the tenders – making the proposals from different advisors easier to compare. [This process is similar to scoring applications for employment.] There is no obligation to accept the cheapest proposal – the aim is to get the best value for money within your budget. Ensure that you exchange written agreement on the work to be done, the cost and the timescale with the successful bidder.
- If you select an advisor, you should ensure that you exchange written information confirming the work to be done, the cost and the timescale.
- This guidance relates to support at an early stage of the development process. It is important to confirm with the advisor – particularly professional advisors such as architects – that involvement at this stage does not imply continuing work on the project as it progresses. Many funders at feasibility and development stages will require that professional support work is tendered.

Factors you could consider in selecting your advisor:

- How accessible is the advisor to you – where are they located – will they come to you?
- Based on your contacts with them (phone call, information supplied, meetings), will you be able to form a good relationship with them?
- Are they clear communicators?
- What qualifications do they hold? I.e. Accountants should have a relevant CCAB recognised qualification.
- Do they have professional indemnity insurance?
- Are they registered with the appropriate professional body? I.e. Architects should be ARB registered (see www.arb.org.uk), Solicitors should be on the Solicitors Roll which is held by the Law Society, (see www.lawsociety.org.uk).
- Will they go that extra mile, make an effort and avoid jargon and being patronising?
- Do you think they are actively interested in what you are doing?