

Choosing an Archaeology Consultant

The expertise of consultants who specialize in historic preservation can be very useful to you in completing your historic preservation projects. In the early stages of your planning, you should try to identify the stakeholders and interested parties for your project and initiate broad-based consultation with them to discuss their concerns and insights regarding the project. These concerns and insights should be clearly communicated to any cultural resource management consultants who are hired for the project. Keep in mind that many historic preservation projects may require the involvement of more than one type of specialist.

How Should I Begin to Select a Consultant?

Before you do anything else, define your project carefully in writing. Lists of consultants who work in Ohio are available at the Ohio Historic Preservation Office, though the office does not endorse or recommend any consultant. Investigate consultants enough to identify several who appear to meet your needs. Invite them to submit proposals for your project based on the written description you provide. You may also wish to check with local colleges and museums to see if they have anyone with specialized knowledge about archaeological or historical resources in your project area. They may also have people on their staff who regularly conduct the type of work you are considering. Remember that although colleges and museums may be able to offer benefits such as lower costs and local experience, they may have more trouble meeting your scheduled deadlines if they rely on student or volunteer workers.

How Do I Judge Consultants?

You should consider the specific needs of your project as well as the consultants' fields of expertise. Your final decision will be based on the consulting firm's competence, qualifications and capability of undertaking your particular historic preservation project. Always keep in mind the qualifications necessary for your project, including demonstrated previous experience in similar endeavors. Each consultant's proposal should be evaluated to ensure that the individual or firm is qualified for, understands and can complete your job. Compare acceptable proposals and select the consultant with the best pro-

posal and best price. If you have questions regarding the suitability of the research strategies in the proposal, call the Ohio Historic Preservation Office for clarification.

How Do I Determine Whether A Consultant is Qualified?

A prospective consultant should have a healthy mix of education and experience relevant to your project. Consideration should be given to consultants with a graduate degree in a closely related field; in some cases, significant work experience will bring additional skills to your project.

- A prospective consultant should have the necessary experience, staffing and availability of technical and support services to complete the project.
- For some projects, a consultant must meet specific professional qualifications. The Ohio Historic Preservation Office can assist with questions about what qualifications to specify for your project.
- Especially for surveys and National Register of Historic Places nominations, a consultant should demonstrate familiarity with the specific kinds of historic property types in the project area and the various techniques of historical research needed to complete the project.
- Especially for compliance projects, in which the effect of undertakings on historic properties is considered in accordance with Section 106 of the National Historic Preservation Act, a consultant should be able to explain procedures and recommendations to you clearly so that you understand what is needed, why it is needed and how to evaluate and use the finished products and findings.
- A prospective consultant should be familiar with the procedures outlined in the Ohio Historic Preservation Office's Archaeology Guidelines, and have experience with completing the Ohio Archaeological Inventory Form in a professional manner.

Performance

Can the consultant demonstrate a record of

satisfactorily completing projects? Have prospective consultants submit copies of relevant previous work. Contact several clients from the list of references and ask whether reports and other documents were thorough, neat, submitted on time and otherwise acceptable. Contact the Ohio Historic Preservation Office to see if additional information from the consultant was required in order to complete those projects.

- Does the consultant have good communication skills and demonstrate an understanding of your project, needs and goals? The consultant should be able to give direct answers to all of your questions.
- Has the consultant provided evidence that he or she is staying current with trends in his or her area(s) of expertise (e.g., by attending or participating in courses, conferences, and workshops, or by publishing in peer-reviewed journals)?

Cost

Archaeology consultants, like consultants in any other field, charge a fee for their services. Generally speaking, you can expect the cost of a consultant to be equal to what you would pay other professionals working an equivalent amount of time.

- In the proposal, the consultant should clearly state the products that will be delivered for the cost proposed and present a time frame, with beginning and ending dates, including deadlines for any drafts you require.
- The consultant should include information regarding costs for curating artifact collections and original field notes in an approved repository.

Writing Requests for Proposals

The following checklists provide basic outlines for preparing and reviewing requests for proposals and reviewing products submitted by consultants. Tailor these to the specific needs of your project. The Ohio Historic Preservation Office can provide sample requests for proposals. In most circumstances, it is important to flag project boundaries and allow prospective archaeological consultants the opportunity to see

the project area conditions before they submit a proposal.

• **Information Provided by Client**

- background/issues
- project description
- area characteristics
- goal of project
- scope of work
 - task outline
 - specific requirements
 - level of community input
- products to be generated
 - number and nature of products
 - format requirements
- presentations expected before, during, and after project
- time requirements and deadlines
- pre-proposal conference (if any)
- client responsibility/involvement
- selection criteria
- client contact address/phone
- proposal deadline: date and time

• **Information Requested from Consultant**

- qualifications required/requested
 - education (c.v. or resume)
 - meets professional qualifications
- list of previous clients
- samples of relevant previous work
- methodology or approach
- statement of products
- schedule
- cost (may be separate if requesting qualifications first)
- references

• **Evaluating the Proposals**

- establish review committee
- use established selection criteria
 - qualifications meet requirements
 - previous experience relevant
 - methodology satisfactory
 - work samples satisfactory (were the projects clearly described and can you understand what was done?)
 - staffing adequate for job
 - schedule reasonable
 - references satisfactory
 - cost competitive
- use objective rating system
- notify all applicants of decision

Project Monitoring

- maintain regular contact with consultant
- enforce deadlines
- carefully review all submissions
- content meets expectations
 - product neat, complete and organized
 - conclusions/recommendations well stated
 - graphics appropriate
- coordinate with Ohio Historic Preservation Office
- comply with submission requirements (if any)
- consider future use of products/findings
- public education
 - presentation of results to client/public
 - dissemination of products/findings

Specific Product Considerations

Remember that you are ultimately responsible for the products submitted to the lead agency and to the Ohio Historic Preservation Office, so it is in your interest to thoroughly review the work that your consultant has done.

• **Archaeological Survey/Inventory Report**

The report should emphasize the work that was done for your specific project, rather than generalized background information. The specific recommendations in the report can be very helpful in coordinating further consultation with the lead agency, the Ohio Historic Preservation Office, the local community, and others, as appropriate. If you do not understand the recommendations in the report, ask the consultant to clarify the information before

it is submitted to the lead agency and the Ohio Historic Preservation Office. This will help reduce potentially costly delays for your project when the report is submitted for review.

- research design
- methodology
- meetings/public participation
- individual inventory forms and area maps
 - computer coded (if required)
- evaluations of properties/area
- bibliography
- data management
 - artifact curation agreements
 - location of original notes, negatives, etc.
 - state whether data computerized locally
- describe report dissemination


• **National Register Nominations**

- completed nomination form
 - all sections completed
 - United States Geological Survey Maps
 - b&w photos/color slides as required
- completed archaeological site inventory forms

• **Booklets, Tour Guides, Other**

- accuracy/quality of content
- neatness and readability of narrative
- appropriate graphics
- well-designed product
- includes sources of additional information

For additional information: "Using Professional Consultants in Preservation," *Information* series No. 26, 1994, available from the National Trust For Historic Preservation, 1785 Massachusetts Avenue, N.W., Washington, D.C. 20036, (202) 673-4296.



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To better serve you we recommend that you call ahead for an appointment

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