

What should a safeguarding consultancy brief contain?

Define the context, outcomes, scope, evidence, deliverables, timetable and evaluation approach.



Commission with clarity

A good safeguarding consultancy brief gives potential providers enough information to understand why the work is needed, what you want to achieve, what is in and out of scope, who needs to be involved and when the work needs to happen.

A clear brief makes it easier to attract the right expertise, compare proposals fairly and avoid misunderstandings about what a consultant is being asked to deliver.

It does not need to be lengthy. A concise, well-structured brief is usually more useful than a detailed document that leaves the purpose or expected outcomes unclear.

Use the headings below as a practical checklist when preparing your brief.



The commissioning principle

A concise, outcome-focused brief helps suitable providers respond clearly and gives every proposal a fair basis for comparison.

1 Context: why is the consultancy needed?

Start by explaining the organisational context and the reason you are commissioning external support.

Include relevant information such as:

- A brief description of your organisation and the services or people it supports.
- The safeguarding responsibilities relevant to the organisation.
- The issue, concern, development or opportunity that has led to the commissioning requirement.
- Any relevant recent developments, inspections, reviews, incidents, audits, complaints, learning or organisational change.
- Existing safeguarding arrangements, policies or strategies that are relevant to the work.
- Previous external consultancy or review work, where relevant.
- The intended audience for the work and who will use the findings.

You do not need to provide every piece of background information at the outset. Focus on information that will help a consultant understand the problem to be addressed and the environment in which the work will take place.

Useful question

What does a consultant need to know to understand why we are commissioning this work now?

2 Outcomes: what should be different as a result?

Describe the outcomes you want the consultancy to achieve.

Try to distinguish between activities and outcomes.

For example:



Example

Activity: Review our safeguarding policy and procedures.

versus:



Example

Outcome: Provide assurance that our safeguarding arrangements are clear, effective and proportionate, with practical recommendations for improvement.

Possible outcomes might include:

- Greater assurance about safeguarding arrangements.
- A clearer understanding of strengths, risks and areas for improvement.
- Improved governance and accountability.
- Greater consistency in safeguarding practice.

- Clearer roles and responsibilities.
- A prioritised improvement plan.
- Increased confidence among leaders, practitioners or trustees.
- Learning from an incident, review or previous activity being embedded into practice.
- Evidence to inform a safeguarding strategy or organisational development programme.

Be specific about what success will look like. Where appropriate, identify how you will know whether the consultancy has achieved its intended outcomes.

Outcome-focused commissioning helps keep attention on the difference the work is intended to make, rather than simply listing tasks.

3

Scope: what exactly should the consultant do?

Set out the boundaries of the assignment.

A useful scope should identify:

In scope

Specify the areas the consultant is expected to examine or address. This might include:

- Safeguarding governance and leadership.
- Policies, procedures and guidance.
- Roles and responsibilities.
- Safer recruitment and workforce arrangements.
- Training and competency.
- Case recording and information sharing.
- Referral, escalation and response arrangements.
- Partnership and multi-agency working.
- Safeguarding supervision.
- Quality assurance and audit.
- Safeguarding culture.
- Board or trustee oversight.
- Compliance with relevant statutory, regulatory or contractual requirements.

Out of scope

Where there are boundaries, state them explicitly.

For example:

- Individual case management.
- Legal advice.
- HR investigations.
- Formal disciplinary processes.
- Clinical assessment.
- Work that sits within another commissioned project.

This is particularly important where safeguarding consultancy overlaps with other professional disciplines.

Questions to answer

- What questions should the consultant answer?
- What evidence should they review?
- Which services, teams, sites or functions should be included?
- Is the work organisation-wide or focused on particular areas?
- Are particular groups or cohorts in scope?
- Are there specific standards, frameworks or requirements against which arrangements should be considered?
- Are there matters the consultant should explicitly exclude?

A well-defined scope gives providers a common basis for responding and makes subsequent proposals easier to compare.

4

Stakeholders: who needs to be involved?

Identify the people and groups who will contribute to, influence or receive the work.

Depending on the assignment, stakeholders could include:

- Board members or trustees.
- Chief executive or senior leadership team.
- Safeguarding lead or designated professional.
- DSL or safeguarding manager.
- Operational managers.
- Practitioners and frontline staff.
- HR and learning and development colleagues.
- Quality, compliance or governance teams.
- Service users, children, young people, adults or families.
- Parents, carers or advocates.
- Partner organisations.
- Commissioners.
- Regulators or other external bodies, where relevant.

For each stakeholder group, indicate the expected level of involvement.

For example:

Consider accessibility, confidentiality and the emotional impact of participation where people may be discussing safeguarding experiences.

Stakeholder	Possible involvement
Board/trustees	Briefing, interviews and consideration of recommendations

Stakeholder	Possible involvement
Senior leaders	Interviews, evidence review and final discussion
Safeguarding team	Core project contact and evidence provision
Practitioners	Focus groups or interviews
Service users	Consultation or involvement in understanding experience
External partners	Interviews or multi-agency perspective

Meaningful engagement with people affected by safeguarding services can strengthen commissioning and help ensure that the work reflects lived experience rather than only organisational perspectives.

5

Constraints and dependencies: what does the consultant need to work within?

Be open about constraints from the beginning.

These might include:

- Available budget or budget range.
- Required completion date.
- Staff availability.
- Geographical spread.
- Number of sites or services.
- Access to records or systems.
- Information governance requirements.
- Confidentiality requirements.
- Restrictions on interviews or focus groups.
- Existing organisational change programmes.
- Planned inspections or regulatory deadlines.
- Procurement requirements.
- Internal approval processes.
- Required insurance or contractual conditions.
- Any conflicts of interest or independence requirements.

If there is a fixed deadline, explain why it matters.

For example:



Example

The final report is required before the September Board meeting so that the organisation can agree its safeguarding improvement plan.

This gives providers the information they need to assess feasibility and propose an appropriate methodology.

6 Evidence and information available

Tell providers what information will be available to them.

This might include:

- Safeguarding policies and procedures.
- Previous audits or reviews.
- Safeguarding strategies.
- Board or committee reports.
- Training data.
- Workforce information.
- Quality assurance data.
- Relevant case records or anonymised case information.
- Inspection reports.
- Complaints or feedback themes.
- Previous action plans.
- Relevant organisational policies.
- Service user feedback.

You can state whether documents will be provided with the invitation to tender, made available to the successful provider, or available only subject to appropriate information governance arrangements.

If there are significant evidence limitations, say so. A consultant can then build an appropriate methodology around them.

7 Deliverables: what should you receive?

Specify the tangible outputs you expect from the assignment.

Depending on the purpose, deliverables might include:

- Inception meeting and agreed project plan.
- Evidence or document review.
- Interviews, focus groups or consultation.
- Findings presentation.
- Written report.
- Executive summary.
- Assurance statement.
- Recommendations.
- Prioritised improvement plan.

- Action plan with suggested timescales.
- Board or trustee presentation.
- Workshop to support implementation.
- Follow-up review.
- Evaluation or impact report.

For each deliverable, consider specifying:

- Format.
- Intended audience.
- Level of detail.
- Required date.
- Whether recommendations should be prioritised.
- Whether the consultant is expected to support implementation as well as identify improvements.

A useful distinction

Avoid simply asking for a “full report”.

Instead, explain what the report needs to enable the organisation to do.

For example:

Example

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The final report should identify strengths, areas of risk and opportunities for improvement, with recommendations prioritised according to urgency, impact and feasibility. It should provide sufficient detail for the organisation to develop a practical improvement plan.

8

Methodology: what approach do you expect?

You do not necessarily need to prescribe the consultant’s methodology.

Instead, describe the requirements the methodology needs to meet and invite providers to explain their proposed approach.

For example:

Example

?

Please describe how you would approach the assignment, including evidence review, stakeholder engagement, analysis, triangulation of findings and reporting.

Ask providers to explain:

- How they will gather and analyse evidence.
- Who they propose to engage.
- How they will ensure a balanced picture.
- How they will handle confidentiality and sensitive information.

- How they will identify and validate findings.
- How they will distinguish assurance from recommendations for development.
- How they will involve people with relevant lived or professional experience, where appropriate.
- How they will manage emerging safeguarding concerns identified during the work.

This allows providers to demonstrate professional judgement rather than simply responding to a predetermined methodology.

9 Consultant requirements

State the expertise and experience that are genuinely necessary for the assignment.

Consider asking for evidence of:

- Relevant safeguarding expertise.
- Experience of similar consultancy assignments.
- Knowledge of the relevant sector.
- Experience working with organisations of comparable size or complexity.
- Appropriate professional qualifications or registrations, where relevant.
- Experience of independent reviews, audits, assurance or organisational development.
- Experience engaging with senior leaders, boards or trustees.
- Understanding of relevant legislation, regulation and statutory guidance.
- Appropriate information governance and confidentiality arrangements.
- References or examples of comparable work.

Avoid creating unnecessary requirements that could exclude suitable providers.

The key question is:

What experience would give us confidence that this provider can deliver this particular assignment well?

10 Budget and pricing

If you have an established budget or budget range, consider stating it.

This can help providers determine whether the proposed scope and methodology are realistic.

Explain what you expect the quotation to include, for example:

- Professional fees.
- Travel and accommodation.
- Preparation time.
- Meetings and interviews.
- Report writing.
- Presentations.

- Expenses.
- VAT, where applicable.

You may also ask providers to identify any assumptions that underpin their price.

If the budget is fixed, be clear about this and explain whether providers may propose alternative options where the full scope cannot be delivered within the available budget.

11 Procurement and timetable

Include a clear procurement timetable so providers know what is expected and when.

A simple timetable might include:

Stage	Indicative date
Brief issued	1 September
Deadline for clarification questions	8 September
Responses to questions issued	11 September
Proposal submission deadline	18 September
Evaluation	21-25 September
Interviews/presentations, if required	28 September
Preferred provider notified	30 September
Contract agreed	5 October
Project commencement	8 October
Final report	30 November

Dates should be realistic and allow sufficient time for providers to understand the requirement and prepare a quality response.

Public-sector commissioning guidance emphasises fair, open and transparent procurement, with clear arrangements for questions, evaluation and submission.

If the procurement is subject to formal organisational or public-sector rules, make sure the timetable allows for all required approvals and processes.

12 How proposals will be evaluated

Tell providers how you intend to assess responses.

A proportionate evaluation framework might consider:

Evaluation area	Example weighting
Understanding of the requirement	20%
Relevant safeguarding expertise and experience	25%
Proposed methodology and approach	25%
Quality and usefulness of deliverables	10%
Capacity and ability to meet the timetable	10%
Cost and value for money	10%

The exact weighting should reflect your priorities.

If quality and expertise are critical to the assignment, do not allow price to dominate the evaluation.

Make sure the evaluation criteria relate directly to the requirements set out in the brief.

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A one-page safeguarding consultancy brief template

You can use the following structure as a starting point.

1. Organisation

Organisation:

Service/area:

Main contact:

Procurement contact:

2. Background and context

Briefly describe the organisation, relevant safeguarding context and why external consultancy is required.

3. Purpose of the assignment

What is the consultancy intended to achieve?

4. Desired outcomes

By the end of the assignment, what should be different, clearer or improved?

5. Scope

In scope:

Out of scope:

6. Key questions

What questions should the consultant answer?

7. Stakeholders

Who should be involved, interviewed, consulted or informed?

8. Evidence available

What documents, data, reports or other information will be available?

9. Constraints and dependencies

What budget, timescale, access, confidentiality, governance or other requirements should providers understand?

10. Deliverables

What outputs are required, for whom and by when?

11. Provider requirements

What safeguarding expertise, experience, qualifications or organisational requirements are essential?

12. Proposal requirements

Ask providers to set out:

- Their understanding of the requirement.
- Proposed methodology.
- Project team and relevant experience.
- Approach to stakeholder engagement.
- Deliverables and timetable.
- Assumptions and dependencies.
- Total cost and pricing assumptions.
- Relevant references or examples of comparable work.
- Any conflicts of interest.

13. Procurement timetable

Brief issued:

Questions deadline:

Question responses issued:

Proposal deadline:

Evaluation:

Interview/presentation:

Preferred provider notified:

Contract agreed:

Work begins:

Final deliverables due:

14. Evaluation criteria

Set out the criteria and weightings that will be used to assess proposals.

T**Before you issue the brief**

Use this final check:

- Is it clear why the consultancy is needed?
- Have we described the outcomes we want, rather than only the activities?
- Is the scope specific enough to price accurately?
- Have we stated what is out of scope?
- Have we identified the people who need to be involved?
- Have we explained the evidence available to the consultant?
- Are important constraints and dependencies clear?
- Are deliverables specific and achievable?
- Have we explained what expertise we require?
- Have we stated the budget or pricing expectations, where appropriate?
- Is the procurement timetable realistic?
- Are the evaluation criteria clear and proportionate?
- Will every provider be assessed against the same requirements?
- Have we considered accessibility, confidentiality and information governance?
- Have we built in sufficient time for internal approvals and contract arrangements?

P**The principle to remember**

A good consultancy brief describes the problem, the intended outcome and the boundaries of the work - without unnecessarily prescribing the solution.

The strongest briefs give providers enough information to make a realistic proposal while leaving room for them to demonstrate professional judgement, expertise and a different or better way of achieving the required outcomes.

For safeguarding work in particular, clarity about independence, confidentiality, stakeholder involvement, evidence and how findings will be used can be just as important as the specification of the work itself.

Important information

SafeguardingLink helps organisations identify and compare safeguarding professional services. This guide is intended to support commissioning decisions; it is not advice about an individual safeguarding concern or a substitute for your organisation's procurement, legal or safeguarding procedures.

SafeguardingLink helps organisations define professional service requirements and compare independent safeguarding providers. Independent providers supply their own information; a listing is not accreditation, approval, endorsement or a suitability guarantee.

More commissioning resources: www.safeguardinglink.co.uk/resources