



Best Practice Guidelines for Hiring a Security Consultant

INTRODUCTION

The potential impact of violence against the Jewish Community can extend well beyond direct physical or psychological damage. Failure on the part of corporate and non-profit organizations to adequately plan and respond to this heightened threat environment can also be expressed in loss of life, major liability awards, increased insurance premiums, business recovery and reconstruction costs. As a result of these unique challenges facing the Jewish community, those responsible for administrative oversight may need to consider hiring outsourced security professionals. The following document is a compilation of best practices and guidelines for the hiring of outside security expertise for the Jewish community.

We are often asked, "Why should our institution hire a security consultant?" The most significant reason is if you know little to nothing about security, then you need to hire an experienced professional that has the credibility and subject matter expertise required for the tasks at hand. Security consciousness is a necessity for leaders and members of community-oriented institutions. The Jewish community, in particular, is mindful of the need to balance vigilance and a determination to maintain the open, vital, supportive atmosphere, which represents the very purpose of places of worship and community cohesion. With this in mind, the vetting of the security consultant(s) should also take into account their familiarity with those issues and conditions that are particularly relevant to the Jewish community both domestically and internationally. A solid track record and reference base concerning this area of specialized interest provides a benchmarking that can be helpful when evaluating the subject matter experience of the prospective consultants.

WHY HIRE A SECURITY CONSULTANT

The first thing we need to do is define security. There is not a "universally accepted definition." Security is a hybrid profession blending various skills, backgrounds, and preparation. Security professionals have varying perspectives, often because of the unique degree of specialization required in their current assignment. Security provides those means, active or passive, which serve to protect and preserve an environment that allows for the conduct of activities within the organization or society without disruption. There is a lot more than just looking at your doors, windows and locks or alarm systems to figuring out what security measures are needed to protect your synagogue, school, institution, or agency. The primary goal is to prevent loss of life by reviewing your liabilities on security issues and reducing or eliminating them. Planning is required since it is an approach that recommends identifying and stopping a problem before it occurs, reducing hazards in given situations, and of forecasting rather than reacting to circumstances (2).

Competent security consultants know what to look for when identifying security issues and know how to properly mitigate the conditions through cost effective reductions/eliminations. After careful evaluation, it may make sense to use a security consultant to get the best security/cost value proposition you can; think of the expense as an investment for the future.

Consultants can help you with the following issues:

- Negligent Hiring/Retention
- Premises Liability
- Negligent Security
- Hiring Contract Security Services
- Physical Site Security Surveys
- Anti-Terrorism
- Fraud and Internal Thefts
- Disaster recovery
- Risk Analysis
- Crime Prevention (1)

QUESTIONS TO CONSIDER WHEN HIRING A SECURITY CONSULTANT

Hiring an independent security consultant has many advantages: an objective perspective; a new outlook on old problems; and new ideas and solutions resulting from a diverse set of experiences. However, as with any major security decision, it pays to do research and to ask questions in advance. On the surface, hiring a security consultant for Jewish institutions and organizations to improve your security policies and procedures while mitigating your security risks and vulnerabilities may seem like a relatively easy decision process for an organization. However simple this task may seem, careful consideration should be demonstrated when choosing your security consultant. Here are some basic questions that anti-terrorism and security specialists suggest that you ask about your own organization and about the security consultant you intend to hire:

1. Is my organization really willing to make changes?

Your security consultant may ultimately recommend some significant changes in equipment, personnel, or procedures. Do you have commitment from your executive and/or lay leadership to spend the time and money needed to make changes? Will they back you up long term, especially when difficulties arise, such as employee resistance to change or challenges from shareholders? Will they follow-through?

2. Does this consultant know my industry and particularly the needs of my community?

Analyzing threats for Jewish institutions is very different from evaluating dangers at other non-profit organizations and religious organizations. Violent, often deadly attacks are being perpetuated against the Jewish community, including children. The dangers posed to synagogues and other Jewish institutions are a matter of record. Therefore, while there may be some common issues, there are enough significant differences that specialized experience and knowledge are crucial, particularly knowledge of anti-terrorism vs. crime prevention as well as an understanding of the special concerns of the Jewish community.

3. Are there competing or conflicting interests at work?

Some consultants are truly independent, representing neither a particular company nor a particular technology solution. Others, however, may be using their consulting

services as a door opener to sell particular products and services you may or may not need but for which a consultant may collect commissions or other fees.

4. Will you be independent or dependent when the project ends, meaning with the assessment process include justification and rationale for the recommended security changes?

The ideal consultant will not only help you solve the current problem but also equip you with skills and knowledge to begin to tackle the next one. You may not be able to solve all future problems on your own, but you should know enough to begin preparing ideas.

5. Will the consultant's services include training seminars, materials, or other extras to use with the staff?

No doubt you'll need to educate others within your organization about your new security procedures and changes. The consultant should have the skills and abilities to conduct implementation and follow-on training as required.

6. How comprehensive is the consultant's knowledge and approach?

In some cases, you're hiring a consultant to solve a specific problem. Using a consultant that has a broader perspective, however, means possibly identifying and solving problems you may not have considered before.

7. Who's on the case?

You might have a highly experienced, senior consultant make the pitch to get your business. But will you ever see that expert again after you've signed on the dotted line or will your job be relegated to junior staff? Make sure you get the experience you pay for.

8. What are the steps in the evaluation, planning, and implementation process the consultant will use?

Is it a cookie-cutter approach or are the consultant's methodologies customized to your community? For example, some security consultants use a cookbook checklist originally designed for another application, which is now relegated to being a catchall assessment used for every facility.

9. How does the security consultant meet reporting requirements?

Make sure that you discuss exactly what it is you require from the consultant as a reporting deliverable (or series of deliverables) for your security assessment. For example, do you want the consultant to deliver the final report in a written form that may be discoverable through the Freedom of Information Act? Or would your requirements be better served by having the consultant give you an oral presentation of your vulnerabilities? Make sure these requirements are settled at the start of the project.

10. Can the security consultant advise on implementation and training?

To ensure consistency in the transition from mediation recommendations to security systems implementation, it is best to ensure that your security consultant will be able to provide technical training for new security policies, procedures, and systems implemented as a result of your facility risk and vulnerability assessment. After you've gone through this "deceptively simple, yet endlessly complicated" process - from hiring a competent security contractor to implementing the contractor's recommendations - the most important question remaining is, When do I start this process all over again? As your security consultant can tell you, the answer to that question is right away (3).

GUIDELINES FOR HIRING A SECURITY CONSULTANT

When seeking the services of a security consultant, it is crucial to match your needs or requirements with the specific expertise and experience of the right consultant. Keep in mind the following as you begin looking for a security consultant.

If It Says "One Size Fits All," It Doesn't Fit Anyone.

Few consultants would presume to offer one-stop shopping for all your security needs. The consultant who claims to be an expert on workplace violence, CCTV, personnel security issues, warehouse and transportation security, and proprietary information programs - or an expert on your industry plus six others - might not be the genuine article. To keep up with changes in technology, law, management and organizational structure, a consultant would have to devote 19 hours a day to staying current. In short, these days you can't be an expert generalist.

Beware Of The Bargain.

Most established, reliable consultants have an established fee structure. It was in place long before your call came in, because they know their business and how much time and effort the project will take and what their costs will be. There will always be some negotiation, but the basic pricing should remain constant, and that's to your advantage as much as to the consultant's.

Statement of Work.

If you're only going to ask one consultant for a proposal, a good strategy is to ask that consultant to help you develop a statement of work. If you will have several candidates for the project, ask them to provide comments and questions in a draft proposal. This will level the playing field and help crystallize the working relationship and scope of services. You'll know early on whether your expectations are realistic. Few consultants will decline to help out in this development process, because it allows them to showcase their expertise and knowledge of the project requirements; it is an excellent test drive without obligation.

There's No Such Thing As Instant Experience.

Seek expertise with only the best professional reputations and competencies. How do you find and evaluate them? From the recommendations of those who knew them, on the basis of their academic and professional credentials and on the basis of their independent and creative natures.

The same applies to hiring a security consultant. Primary selection criteria include recommendations from other consultants and industry specialists you've had contact with and whose opinions you respect.

Other criteria include formal education, professional development programs and certifications by professional societies. A consultant's publications and professional papers can be valuable as well, especially if peer review is a means of selection. Consultants who write for professional publications have to keep abreast of the myriad changes in technology, techniques and trends. Consultants who are not "product-affiliated" are most likely to provide economical, creative solutions, because they can make objective assessments and recommendations.

Other resources that will help you identify the right consultant are commercial referral services and professional organizations. These groups use databases to link you with consultants who have already been screened and whose credentials have already been verified (4).

ADDITIONAL TIPS

- Determine whether your candidate is truly a full-time independent security consultant, not a part-time consultant or one that is tied to the sale of products or other services, such as a hardware salesman, guard contractor or private detective who professes to do it all.
- Examine the consultant's credentials. Look for the "CPP" "Certified Protection Professional" designation from [ASIS](#), or a Registered Member of the [International Association of Professional Security Consultants](#).
- Does the prospective consultant carry professional liability (E&O) insurance? Not the state-mandated private investigator's or guard providers Insurance, but Professional Liability Insurance with limits of liability sufficient to protect your assets, many do not. Ask the question, and require a copy of their insurance certificate.
- Beware of the Bargain! A person who does not offer a total solution but only offers a list of tasks at a bargain rate may in fact never complete the real assignment, may not do it well, and it may cost you more. Require a fixed fee and a work plan. Often times the high-end consultant is more cost efficient and cost effective, not only in terms of project cost, but in terms of value to your institution, because he may have a better understanding of your needs, and can therefore work more efficiently.
- Once a consultant is engaged, you get hooked. Good consultant(s) will teach you what they know, what they have learned and they will work with you to devise mechanisms to address present and future needs. They know when to move on, and when to be available for new challenges (4).

ADL GUIDELINES FOR HIRING UNIFORMED SECURITY CONTRACTOR

Security Consciousness

The potential for anti-Semitic incidents threatening Jewish institutions and individuals significantly increases during times of high visibility and activity by the Jewish community. Unfortunately, Americans became all too familiar with this chilling reality during a few short summer months in 1999.

Understanding that a large number -- if not the overwhelming majority -- of Jewish institutions consider and often hire security contractors during the High Holy Days and beyond, this publication is designed to provide you and your institution with the necessary information to make informed choices when employing a security contractor.

We recommend you share this material throughout your institution and with your Board of Directors. If you require any additional information, please contact your local ADL Regional Office. A list of contact numbers can be found at the end of this publication.

Indicators of Potential Exposure

Initially, it is of critical importance to determine if increased security measures are necessary. If an institution has experienced any of the following threats, then it may wish to explore hiring a security contractor:

- Written or verbal threats
- Hate-based graffiti
- Theft or unexplainable losses
- Appearance of mysterious packages
- Local crime patterns

If recent crimes in your area suggest an increased risk or if there is a sense of insecurity among your congregation, a security contractor may create an increased sense of security.

Guidelines for Using Security Contractors

Once a decision is made that your institution has immediate or long-term security needs, it should be determined whether limited or complex security requirements are necessary. ADL strongly recommends that each institution undertake security as a long-term, ongoing process.

Statement of Work

During holidays or special events where security guards may be required on a short-term basis, institutions should obtain competitive bids as soon as possible. It is essential to check with local law enforcement and other community agencies for recommendations. Further, the institution should define the security contractor's scope of work. All of the following criteria should be met:

- A concise statement describing the security tasks to be performed including the number of days and hours that security is needed. This information should be clearly outlined with the Security Contractor before security staff is assigned to the site.
- A detailed set of general and particular special instructions. The importance of these instructions cannot be overstated. The institution should not rely on the Security Contractor to provide them. These instructions should be discussed with and agreed upon between the decision-makers of the institution and the security firm.
- Assignment of one person who will be the security guard's contact, and will greet the security guard upon arrival to ensure that the security guard understands his/her role, and among other requirements, has a neat appearance and proper attitude.

Security Guards

First impressions are important in determining how the security guard will perform. It is important to remember that the security guard is present to deter and detect unusual or suspicious activity as well as to safeguard property and people. The following are key points that the institution's contact person should discuss with the security guard:

- Assess the security guard during the shift for alertness.
- Discuss with the security guard rules of conduct that enhance effectiveness. For example, no smoking, practical joking, fraternizing, etc.
- Explain the scope of work and provide in writing concise expectations as soon as the security guard arrives, which include:
 - Institutional contact and how to immediately reach him/her.
 - Requirements of the assignment.
 - Purpose of security during the prescribed times.
 - Layout of the facility.
 - Facility security and/or fire regulations.
 - Any vulnerable areas.
 - Locations of telephones, fire-fighting equipment, fire alarms, emergency exits, etc.
 - Location of stairways and doors.
 - In the event of an emergency (fire, suspicious package, bomb threat, etc.), clear operational guidelines.

Criteria for Security Contractor Selection

As soon as the need for a security firm has been determined on an immediate or long-term basis, a security contractor should be selected. Selecting a company that has valid, current state licenses is essential. To determine the reputation of a security contractor, it is advisable to investigate any history of complaints about the prospective security contractor reported to the state licensing authority. You should be certain that a company is reliable and in good standing. All of the following criteria should be met:

- Insurance
- Track Record
- Proposal Characteristics

- References
- Costs
- Contract
- Management
- Security Guards

Insurance

After a security contractor's license has been established, scrutinize the insurance coverage the security contractor provides. The following criteria should be met prior to hiring a security contractor:

- The contractor provides and maintains adequate insurance coverage for your situation.
- Your risk manager (insurance agent) approves of the contractor's coverage.
- Contractor's Broad Form General Liability Insurance covers a minimum of \$1 million per incident and \$3 million total. The higher the coverage the better.
- Workers Compensation Insurance is at statutory minimums.
- Vehicles utilized by the security contractor have adequate Automobile Liability Insurance coverage
- Security contractor's insurance covers sexual harassment through their Professional Liability coverage.
- Liability coverage for special equipment provided (golf carts, computer equipment, watch clocks, etc.).
- Contractor's insurance carriers name your organization as "Additional Insured" on their liability insurance policies. If so, is there an extra charge for this?
- Your insurance advisor does not object to any of the policy "Exclusions."

These criteria are important in determining whether a security contractor's insurance coverage is sufficient to meet your needs. A security contractor must both provide security and be properly insured.

Reputation

A security contractor's reputation should be examined to insure the company has maintained a trustworthy and dependable reputation. To determine the quality of past work, ascertain whether there has been a recent history of valid or successful lawsuits against the contractor filed by clients or employees. This can be learned at your local courthouse. Consider three main factors when researching a company's history:

Negligence

Determining possible history involving negligence by the contractors is important. By reviewing liability insurance claims history, your organization should be provided insurance "Loss Experience" or "Loss Runs" by the contractor upon your request. Your lawyer can explain the report and advise you on the significance of each case and report.

Workers Compensation Claims

Review their listing of worker compensation claims to determine the possibility of patterns of carelessness or inadequate employee safety practices. This report is

available from the security contractor and your insurance agent can advise you of the significance of each claim.

Experience

Although not essential, the security contractor should have recently provided similar security service. It is recommended to hire a security contractor that has recent experience similar to the needs of your institution.

Proposal Characteristics

Carefully analyze the proposal submitted by a security agency. The proposal should address the specific security needs at your site and demonstrate that the security contractor has carefully reviewed your needs, giving them full consideration in the proposal. The following are key points that the security contractor should enumerate in a proposal for your institution:

Training

The proposal should describe the security-related education and training levels of personnel to be assigned at your institution. Security contractors that provide additional education and training are more likely to divulge this information.

Staffing

Staffing may be regular, rotating or temporary and it is important to know beforehand which personnel you will be dealing with. A permanent staff assignment is always best if it can be obtained. However, security contractors often have difficulty maintaining regular staff as a result of odd shifts, frequently consisting of less than eight hours. You should research the security contractor's history of staff stability and determine excessive turnover or poor relationships with employees. The contractor should also obtain your approval before transferring personnel from your site. To this end, the contractor's needs at other sites should not take precedence over security needs at your site.

Description of Supervision

Does the proposal describe the exact nature of supervision to be provided? Contractors should be willing to explain clearly how they will monitor and control the quality of security services.

Documentation

In selecting the best quality contractor, the proposal should describe the frequency of reports and documentation (daily officer activity logs, incident reports, crime reports, officer time sheets, other special reports, etc.). Consistent and thorough written communication is an important output of contract security services and is the only management control mechanism you have over security services and costs.

Instructions to Security Guard

Carefully analyze whether the proposal includes sample Post Orders or Standard Operating Procedures Manual. This document describes all aspects of job performance at your site, including security guard grooming and decorum, sets the standard of security services, and provides the basis of guard discipline. Ultimately, this document becomes the main basis of legal defense in the event of litigation. The contractor should provide a document that is comprehensive and clear both to you and the security guards.

Emergency Procedures

The contractor's proposal should describe how his/her guards will function under various emergency conditions. The proposal should demonstrate an understanding and coherent approach to a wide variety of nonstandard, unusual or crisis situations.

Equipment Issues

If the security guard is expected to patrol your institution when it is closed (holidays, overnight, etc.), he/she should be equipped with a cellular phone enabling contact with emergency services if needed. It is important for you to ask what other equipment is standard issue and/or the guard is certified to use. For example, will the guard carry a baton? Pepper spray? Handcuffs, etc.?

Extra Services

Determine if there are any special "Value Added" services proposed. The best contractors proudly propose unusual features of their firm's services such as private investigations, extensive employee background checks, useful liaisons with local law enforcement agencies, new state-of-the-art technology application and specialized reports. #009;

References

References help find quality and reputable security contractors. Client references give invaluable insight as to the reliability and performance of a security contractor and highlight areas of possible improvement. To secure the most qualified and experienced security firm, the following criteria should be met:

- Clients verify a contractor's history of relevant experience.
- Past clients' references verify a contractor's history of responsiveness.
- References indicate contractor's employee turnover rate is lower than or equal to that of industry norms.

Costs

Hiring a security contractor is also dependent upon cost. Prospective security contractors should address the following issues:

- How frequently will contractor bill for services rendered? Weekly? Bi-weekly? Other? Is this convenient for you?
- Will it be a flat monthly rate, a uniform hourly rate for all employees or a unique hourly rate for each individual employee? Generally, paying a unique hourly rate for each guard provides clients with the most economy
- Contractor discloses wages to be paid to guards assigned to your site. A good contractor should be willing to discuss openly all cost drivers and the fee or profit margins it expects to earn for the services to be provided.
- Contractor's periodic invoices list wages and bill rates for each guard. Invoice detail provides a good audit trail and shows contractor professionalism.
- How will guard pay increases be handled? Inadequate or stagnant wages are a frequent cause of staff turnover. Wage increases should be proposed in advance by the contractor, based on officer incentive and merit, reflected logically in billing rate adjustment and mutually agreed upon by the contractor and client before implementation.

- Will any additional charges be made for uniforms, equipment, supplies, etc.? Again, these should be proposed, justified, logical, and mutually agreed upon.
- Is the total estimated average monthly cost within your budget? As a rule of thumb, your monthly budget can be calculated using the following formula as a guide:

Estimated average hourly wage rate for security guards in your area	\$7
Estimated average monthly hours per security guard	x173
Estimated number of guards at your institution	x2
Estimated cost for security personnel	\$2422
Estimated markup factor	x1.65
Estimated total monthly cost to your institution	\$3996

The monthly costs to depreciate and maintain necessary security equipment such as patrol vehicles and/or radios should also be reflected in the above budget configuration.

Contract

The security contract ensures the contractor will meet your needs. There are numerous questions and criteria that a security contract should specifically address which indicate the security firm is responsible and dependable. These serve as guidelines to refer to and are enumerated below:

- Does the contractor indemnify you for all security-related liability for which the contractor is responsible? In cases where partial liability is determined by a court of law, does the agreement clearly specify how such indemnifications shall be applied?
- At contract time will there be a price increase? How much? Why?
- Do you retain the right to terminate the agreement at any time and for any reason? Is this right mutual?
- Is the amount of notice required for contract termination reasonable? Thirty days is the usual standard
- Is the agreement sufficiently flexible to meet your needs?
- Does it assure fairness to the contractor and adequate control to the client?

Management

You and the security contractor must share an understanding of the reasons generating the contract. As such, discussion issues should include the following:

- Discuss your desires with management from the outset, allowing the security contractor to communicate with janitors, landscapers and maintenance personnel to create an integrated security team.
- Discuss terms of supervision with the contractor in addition to the contractor supervising your security personnel with both field and management staff. This ensures that the security personnel know, understand, and comply with your site's written policy manual. If a security guard performs below par, it is important to know that the individual will be counseled, disciplined and replaced by the contractor as needed.
- Once the security guards are in place, you will need to monitor them to ensure that they meet high professional standards, project a professional and alert demeanor, and respond effectively to security-related concerns. It should be required that all that written materials from the security guard (logs, reports, etc.) be clear, complete and usable.

Deciding What Kind of Security Should Be Hired

It is important to know that hiring a security contractor, whether limited or extensive, armed or unarmed, is a serious business and not to be taken lightly.

Different kinds of security guards are appropriate for different situations. The most important issue is whether you would like security at your site to be provided by a uniformed or plainclothes guard. Depending upon your security goals, hire a contractor who will provide service that fits your needs.

- The main goal of a uniformed security guard is deterrence.
- The main goal for hiring a plainclothes security guard is apprehension.

After deciding what kind of security to hire, you must determine whether the security guard should be armed or unarmed. There are many costs and benefits to be considered when choosing an armed versus unarmed security guard. The following should clarify in what manner security should be provided:

Armed Security Guards

- It is important to determine if hiring armed security guards meets your institution's expectations for security.
- Realize that armed guards may utilize deadly force.
- Determine the training qualifications the security guards have with firearms.
- Determine the contractor's shoot policy and the use of weapons with regard to deadly force
- Keep in mind moral questions when hiring an armed security guard. You should also determine whether the members of your institution will accept an armed guard on the premises. Please note that special care should be taken if your institution serves many young people. Schools should be particularly concerned with the message an armed guard conveys to students, parents and staff.
- Consider the cost effectiveness of an armed guard. They are much more expensive than unarmed security, due to licensing and training requirements.

- Decide whether the presence of a weapon may escalate the possible use of force and violence which otherwise may not occur.

Unarmed Security Guards

- Use of deadly force is not an issue.
- Unarmed security guards often provide the same deterrent as armed guards without the risk of deadly force.
- The protection afforded by unarmed guards is less expensive and incurs less liability and insurance

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