

Selecting a Planning Consultant for your Intermunicipal Project

Your intermunicipal group has successfully advertised a Request for Proposals for a planning project and the proposals are flooding in. Recruiting a single consultant for multiple municipalities does not have to be difficult process if you follow these steps outlined below.

1. Prepare a Project Management Strategy;
2. Appoint a Consultant Selection Committee;
3. Establish decision making authority; and
4. Choose a consultant;

1. Prepare a Project Management Strategy

If your group has not already done so, an overall strategy for managing the project should be determined. The project management strategy provides the foundation for administering the project. Things you will need to consider: Who/which municipality will manage the costs/budget of the project? Who will develop the Terms of Reference? Will one municipality hold the contract for the group? Who will monitor the consultant's progress to make sure the goals are being reached? Who is the primary point of contact for the group? Who will make the final decisions on the project? Who will ensure that the project goals are being met? Outlining an overall strategy for the management of your project will ensure all participating municipalities have a clear understanding moving forward.

2. Appoint a Consultant Selection Committee

Once your group has created a project management strategy, a Selection Committee should be appointed. The Selection Committee is responsible for choosing the best candidate for the project. Ideally, this committee should include a mix of 1) individuals who will be working with the consultants, 2) those who are familiar with project requirements, and 3) those who understand the goals of the project and how its success might be measured. This committee will review applications, develop questions, request clarification, and/or conduct interviews.

3. Establish decision making authority

In hiring your consultant, who has the final say? Consider whether the Selection Committee will be providing recommendations for their Councils make the final decision, or whether the Selection Committee will have the authority to make the final decision on their Councils' behalf.

4. Choose a Consultant

Quite often, selection is based on the consultant's qualifications and knowledge; related work experience and depth of experience; overall strength of proposal; and proposed remuneration. For a selection committee with little experience in hiring a planning consultant, the following guidelines will help you determine the right consultant for your project.

- I. **Develop a list of guiding criteria.** Determine a set of guiding principles to help steer the Selection Committee. How will the group measure the success of the project? Examine budget, deadlines, external circumstances, reporting logistics. Consider what you are looking for in the final product and gauge whether or not the applicant can meet those needs. Identify what is absolutely needed (i.e. experience in dealing with mining companies) versus what would be nice (but is not essential).
- II. **Analyze each consulting firm.** Is it an individual or team that will be working on the project? Do they have similar experience related to the project that you are undertaking? Do/can they provide similar examples to the project that you are undertaking? How much experience do they have? Are they familiar with the current Saskatchewan Planning Legislation? Do they have the skills/expertise that you require? What experience is lacking? Did they provide references for you to contact?
- III. **Determine the Value of the Offer.** Does the consultant have a vested interest in the project that you are undertaking? Are there additional benefits to the consultant above and beyond receiving the contract? Is this reflected in their proposal? For example, did they provide any innovative/unique ideas to contribute to this project? What does your group want from the District Plan (see below)? Does the consultant understand the environment? Can they identify the broad issues, isolate specific issues, and get a realistic view of what is needed? Do they clearly understand what the final product/end result is?
- IV. **Ask for Clarification.** The Selection committee should compile a list of questions for the consultant in order to provide further information/clarification on issues arising from the proposal. Municipalities also have the opportunity to invite the consultant to meet with them to discuss and clarify outstanding issues.

Sources:

- Comprehensive Consulting Solutions, Inc. *Suggestions on how to select a Consultant or Consulting Company.* (April 1999).
<http://www.comp-soln.com/consultant.pdf>
- Haines, Anne. *Hiring a Planning Consultant: A Guide to Preparing a Request for Proposal.*
<http://learningstore.uwex.edu/assets/pdfs/G3751.pdf>
- Municipal Capacity Development Program, *Tips for Best Practices When Hiring a Planning Consultant.* (2010)
<http://municipalcapacity.ca/resource-materials#Regional%20Planning>
- Municipal Capacity Development Program, *Interview Guide for Hiring a Community Planner.* (2010)
<http://municipalcapacity.ca/resource-materials#Regional%20Planning>

Reviewing and Comparing Proposals Worksheet

TIPS:

- Isolate your priorities and determine what characteristics are key to the completion of your project. (I.e. overall cost, project exclusions and additional costs, value, deliverables, consultant experience (including examples of previous work), innovation, expertise in a specific planning issue, location, demonstration of research and understanding of planning/legislation, etc.)
- Establish a rating system for your guiding criteria. (I.e. a rating system of 1 – 5, where 1 equals expectations not met, 3 equals met expectations and 5 equals exceeding expectations.)
- Rate each criterion for each proposal and tally the results in the bottom column.

Guiding Criteria	Proposal A	Proposal B	Proposal C	Proposal D	Proposal E
Totals					