



PLANNING CONSULTANTS

Michigan Planners in Private Practice Division

Why Use a Planning Consultant?

Planning consultants provide a wide range of expertise in designing and implementing regional and community planning programs, initiatives, and development projects. Both public and private planning efforts can benefit from professional planning services in many situations:

- You require specific skills that your staff lacks.
- You need additional advice on challenging problems.
- You need objectivity, experience, and the credentials of a third party.
- Your staff does not have time to complete a project by a specific date.

Among the qualities a planning consultant can bring to your community are experience, technical expertise, new ideas, objectivity, knowledge of current planning laws and practice, presentation skills and graphic abilities, GIS-computer mapping skills, and public engagement techniques.

COMPETITIVE SELECTION NOT REQUIRED

Michigan law does not require competitive selection for professional services (including planning, engineering, or architecture) regardless of the budget amount. Many communities work with the same planning consultant firm for many years because of the benefits and efficiencies of a firm's local planning knowledge, avoidance of costly selection processes, and the predictability of quality service. Loyalty to a planning firm that consistently provides quality service may best serve your needs and meet your objectives.

Note: Check your municipality's policies and ordinances to confirm if there is a local requirement for competitive selection of professional services.

THE MICHIGAN PLANNERS IN PRIVATE PRACTICE DIVISION OF MICHIGAN ASSOCIATION OF PLANNING

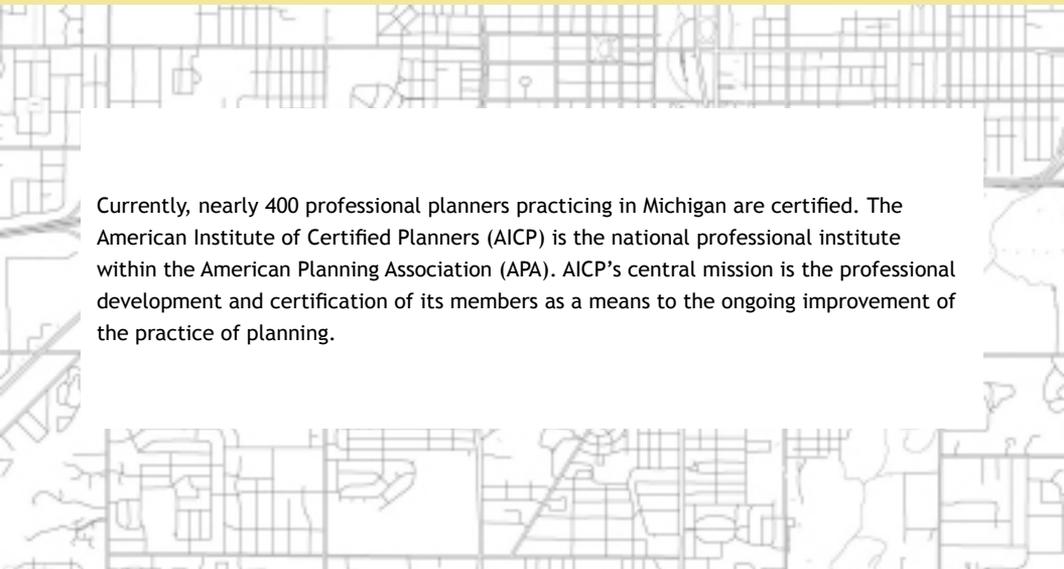
This group of professional planning consultants was created to promote the private sector of the planning profession, to improve the delivery of planning services to both public and private clients, and to participate cooperatively with all planning groups and activities.

How to Select a Planning Consultant

Decide whether you want to have a competitive selection process. A competitive process is most appropriate for new work, large projects, or when selecting a firm to provide general planning services. If consultants are to be selected from a particular geographic area, this fact should be clearly stated. If there is already a particular consultant favored for the work, the project or general service contract should be made noncompetitive and awarded to the preferred consultant.

Define the type of planning job you have. For example, does your job involve zoning, master planning, transportation planning, economic analysis, environmental planning, writing Form Based Code, managing a Charette, or some combination of these? Time spent on the project definition phase will save time and expense in the selection and contract execution phase.

Define your budget! Make sure the project scope is aligned with your budget.



Currently, nearly 400 professional planners practicing in Michigan are certified. The American Institute of Certified Planners (AICP) is the national professional institute within the American Planning Association (APA). AICP's central mission is the professional development and certification of its members as a means to the ongoing improvement of the practice of planning.

The Competitive Selection Process

- 1.** Identify the planning consultants you feel are most appropriate for your work. Consult the Michigan Planners in Private Practice Directory, obtain suggestions from communities involved in similar projects, and advertise by means of a Request for Qualifications (RFQ). Initially you should ask only for letters of interest with statements of qualifications, including past experience on similar projects. From the letters and documents submitted, you will be able to determine which firms you would like to invite to submit detailed proposals. Some federally-funded programs require that all firms interested in submitting proposals be allowed to do so. In these cases you will still invite proposals, but cannot refuse to review those that are not specifically invited.
- 2.** Acquaint yourself with typical planning consultant fees before preparing a budget. The budget for the project should be realistic in terms of the level of effort needed to satisfactorily complete the project. Be clear as to the fee arrangements and cost basis for the work. Arrangements include time charges, time charges with a maximum amount, an estimated range of fees with a not-to-exceed amount, lump sum, or cost-plus fixed fee.
- 3.** Prepare a Request for Proposal (RFP)—the basis for consultants to prepare proposals. Clearly state what products you want completed. To diminish the risk of receiving unacceptable proposals, ensure that all groups interested in and affected by the planning work review the RFP before it is released. Try to limit the number of invited proposals to the five or six you feel have the best aligning qualifications.
- 4.** Ensure that appropriate municipal professionals read and evaluate the proposals. Prepare a “short-list” of finalists for interviews. Final selections should be based on both the written proposals and an interview. It is best to interview no more than three finalists.



- Statement of the problem and planning objective
- Known constraints to solving the problem
- Essential background information
- Meetings expected during the project
- Specifications for the proposals including number of copies, page limits, mailing addresses, and deadline for submittal
- Description of proposal evaluation criteria and process with intended dates for each major step
- Key contact persons for further information
- Level of effort envisioned including anticipated budget
- Draft contract language

Note: Take time up front to be very clear about your project and expectations so that the consultant can determine if the project is a best fit for their firm.



Interview and Selection

1

If interviews are to be conducted, organize a fair and consistent format. Within this format, develop a standard set of questions which will be asked of all finalists. Decide whether the interviews will be public or private. Under Michigan Law, if a quorum of the decisionmaking body is present, it must be a public meeting. During interviews, other consultants should be asked to wait in another room.

2

Inform the finalists of the interview format in advance. Tell them who will be present, who the other finalists are, and what material you expect them to bring. Approximately 45 minutes to one hour should be given to each finalist for presentation and questions.

3

Concentrate on the substance of the work during the interview. Consider qualifications, project understanding and approach, quality of work, personnel, and other objective factors. Do not change your own process once you have set it in motion.

4

Establish evaluation criteria prior to the first interview. The selection team should follow the criteria and may want to assign weights to the different factors.

Some criteria that should guide the selection:

- Objective factors listed in RFP
- Qualifications and experience of key project staff
- Understanding of project and the proposed approach
- Quality of work for other similar projects
- Value of services and products for available budget
- “Chemistry” between consultant and client



A letter informing each planning consultant of the outcome of the selection process is recommended. Moreover, the opportunity for “debriefing” unsuccessful candidates should be offered, including the option to review the winning proposal.

Next step - Contract - Contact your legal counsel for guidance.



10 Reasons to Look to Michigan's Private Practice Community Planning Consultants First

EXCEPTIONAL RESOURCES

More than 30 firms offer community planning consultation. These firms are dedicated to planning in its many forms-master plans, zoning, transportation, economic development, community design, sustainability, among many others. Such a rich resource pool is unavailable in most other states.

MICHIGAN LAWS AND PROGRAMS

An important role of the consultant is to serve as advisor and expert to the client. Being conversant with the laws and state programs that distinguish planning in Michigan from the practice in other states is essential to providing sound advice to our clients.

BENEFICIAL RELATIONSHIPS

Implementation goes beyond simply having a good plan. It often requires the trust and confidence of funding agencies, knowing key contacts in state departments, and the ability to navigate rules, protocols, and hurdles to accomplish objectives. Michigan's consultants offer these personal relationships, in many cases having been nurtured for decades.

ECONOMIC GROWTH

Michigan benefits directly when its businesses flourish. Planning consulting firms hire high wage professionals. These professionals own property; pay taxes; purchase goods and services; and invest in our shared future. As consulting businesses prosper, they too pay local and state taxes. More importantly, they grow and generate more employment opportunities.

CORPORATE CITIZENS

Michigan's consulting firms strive to be solid corporate citizens through contributions to myriad local causes in their respective communities. In addition, the highly educated professionals employed by these firms also contribute substantially to making their communities better by serving as elected officials, school board members, planning commissioners, and local leaders in countless other important ways.

INNOVATION

Michigan based firms offer nationally recognized experts in emerging, as well as traditional, specialties such as form-based codes, access management, infill and redevelopment, sustainability, new urbanism, place-making and more. Many of Michigan's outstanding consultants have earned reputations as innovators among their peers and clients from across the country, and have leadership roles in professional and governmental organizations. They provide training for land use decision makers and they author articles and papers that are published locally and nationally.

CREATIVE CLASS

Talented young professionals graduating from Michigan's planning schools should be retained here. Other talented planners will also be attracted to locate in Michigan if the opportunity and professional challenges are available to stimulate them. These are the people who will reenergize Michigan and contribute to its prosperity. This is the creative class that will rebuild Michigan.

HIGHER EDUCATION

Seven universities in Michigan offer a planning curriculum. Four of these schools are nationally accredited planning programs training young planners to meet the challenges facing every community in the state. Many of the planners working in Michigan's consulting firms have been educated here and hope to remain here to contribute to the betterment of this state, to raise families, to purchase homes, and to start their own businesses.

A SIZEABLE FORCE

There are nearly 400 certified planners in the State of Michigan. Many are employed directly by local or state agencies, but a sizeable percentage are members of private consulting firms ready to be mobilized and fully capable of providing planning expertise and knowledge when needed.

COMMITMENT

Our state's private consulting firms share a common commitment and passion based on a vested interest: to making Michigan great, investing in the future, and retaining our enviable quality of life.



A Division of Michigan Association of Planning
A Chapter of the American
Planning Association



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