

# IN HOUSE WON'T DO, CALL A CONSULTANT

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# Overview of Presentation

- Discuss how to build a successful relationship between “owner” and “consultant”
- Discuss obstacles to a successful relationship and how to avoid those obstacles
- Review when a consultant is needed and process to identify the “right” consultant
- How to be a “good owner” in the owner/consultant relationship
- Case Studies

# Step 1 When Does An Owner Need to Engage a Consultant?

- Lack of Expertise on Owner's Part
- Lack of Time on Owner's Part
- Enhance Credibility

# Step 2 Selecting A Consultant

- Legal and Governance Requirements
  - Generally Two Step Process
    - Identify Best Consultant
    - Negotiate Price
- Developing a Request for Proposals (RFP) or Statement of Qualifications (SOQ)
  - Remember it costs money to develop proposals
  - Scope of Work—what are we trying to do
  - Contract Type—Firm Fixed Price vs Cost Plus vs
- The Interview
- Who to Pick????

# Step 2 Continued

- More Specific the Desired Scope, the better
  - Clearly tell the Consultant what you want if you know what you want
  - Schedule
  - Project Budget
  - Deliverables
- Determining Fee
  - Interest Based Negotiations/Principled Bargaining
  - Remember Consultant is in business to make money, just not too much money on your project
  - Consultant needs to remember we don't have a "money tree" at our park
- Who Develops the Contract between Owner and Consultant

# Step 2 Continued

- Only ask for what you need in determining who to interview
  - Limit Scale of Initial Proposal Submission by Consultant—5-10 pages?
  - Who is working on the project, what is their expertise?
    - Not Just the Principle
  - Can consultant meet the desired schedule?
  - References/Examples of Past Like and Similar Projects
- The importance of the interview
  - Interview Team/Setting/Time for Preparation
  - “How do you (the consultant) determine success?”
  - Ranking the Consultants

# Step 3 Establishing the Relationship

- Formal Relationship Defined by Contract
  - Key Provisions
  - Change Orders Regarding Schedule/Cost/Deliverables
- Informal Relationship Defined by Players
  - Honesty/Sincerity by Both Parties
  - Communication—everybody on same page
    - Frequency of Communication
    - Means of Communication—in-person meetings, phone, email, formal reports
  - Recognizing “stuff” happens
    - How do we deal with adversity?

# Horror Stories from both the consultant and owner point of view

- The “owner” from “\*ell”
- The “consultant” from “\*ell”
- The “project” from “\*ell



# Success Stories

- The greatest consultant of all time looks like:
  - Communicates openly and identifies obstacles in a timely manner
  - Only asks for necessary change orders before schedule or cost change
  - Bills in a timely manner
  - Does what the owner really wants and not what they always do
- The greatest owner of all time looks like:
  - Pays invoices on time
  - Doesn't quibble just for the sake of quibbling
  - Knows what he/she wants and also knows what they don't know
  - Is not schizophrenic

# Case Studies

- Metro Parks Via Ferrata
- Other Examples