



# Working with a Planning Consultant



**MICHIGAN ECONOMIC  
DEVELOPMENT CORPORATION**

## *What you will learn:*

*Understanding your  
planning and zoning needs*

*Different roles a planning  
consultant can play*

*Navigating the contract*

*Project management and  
effective communication*

## ***Understanding Your Planning and Zoning Needs***

Planning services fall into two general categories: ongoing (or continuing) services and project work.

**Ongoing services** means that the local community has hired the planning consultant to provide technical assistance for a specified length of time. The consultant is contracted by the local unit of government and serves as an extension of municipal staff providing a particular set of knowledge and expertise. This typically includes site plan review, but may also include zoning, economic development, design, implementation, community engagement, project implementation, as well as analysis and mapping.

Why you might need ongoing services?

- Community does not have a planner and/or zoning administrator in-house
- Community has a planner or planning director, but would benefit from additional capacity
- Community would benefit from specific expertise, resources, and/or technology
- Community is very active in terms of planning and can save time and expense in the selection and contract execution phase by retaining ongoing planning services for services and projects as they arise

**Project work** means that the planning consultant or firm has been hired to assist with a specific project or process. Typical projects include master planning, zoning ordinance updates, capital improvement planning, as well as specialized planning efforts related to economic development and redevelopment, transit and mobility, sustainability, and open space.

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## ***What the Law Says:***

### **The Michigan Planning Enabling Act:**

A local unit of government may employ a planning director and other personnel as it considers necessary, contract for the services of planning and other technicians, and incur other expenses, within a budget authorized by the legislative body. The appointment of employees is subject to the same provisions of law as govern other corresponding civil employees of the local unit of government.

The planning commission may make use of maps, data, and other information and expert advice provided by appropriate federal, state, regional, county, and municipal officials, departments, and agencies.

### **The Michigan Zoning Enabling Act:**

A zoning commission shall elect from its members a chairperson, a secretary, and other officers and establish such committees it considers necessary and may engage any employees, including for technical assistance, it requires.

Why you might need project planning?

- Community lacks the capacity to run the process or create the plan document in-house
- Update a master plan or create subarea plans
- Update a zoning ordinance or establish a form-based code
- Audit a plan or ordinance with an outside third-party expert
- Create a specific planning document or resource – public participation strategy, redevelopment strategy, mobility plan

Planning consultants provide a wide range of expertise in designing and implementing regional and community planning programs, initiatives, and development projects. Planning firms tend to specialize in one or more areas and may include allied disciplines such as engineering, landscape architecture, and code enforcement.

### ***Different Roles a Planning Consultant Can Play***

Planning consultants understand that their work is not one size fits all. Your community can utilize a consultant in a variety of ways to augment your capacity and provide expertise you may not have in house:

- Facilitating meetings
- Interpreting ordinances (in conjunction with an attorney)

- Providing recommendations for approval or denial
- Economic development role - advocating for good development
- Helping write zoning and master plan amendments
- Expert witness

### ***Navigating the Contract***

Working with a consultant is a two-way street. It requires having a clear scope including tasks, timing, engagement expectations, meeting requirements, and deliverables. A successful partnership also means embracing your role and responsibilities as the client.

**Selection process:** Be explicit in how you will hire a consultant. Describe your needs and expectations and how the consultant will work with municipal staff. Save everyone's time by not "price checking" – going through a formal RFQ/RFP process when you already know who you want to hire is misleading. It takes considerable time and expense to respond to an RFP.

**Paying a consultant:** Ensure every bill is handled promptly – consultants typically bill monthly as they work. The contract will describe payment terms, which are typically lump sum billed as a percentage for project work and hourly for ongoing consultant work. Many communities have established escrow accounts for application fees, which shifts the cost of paying a consultant to review applications onto the developer rather than the municipality paying out of its general fund. Be sure to clarify where the invoices should be

sent and what information is most important for the invoice to contain.

**Deliverables:** Typically, a consultant provides its work product at key phases during a project, including raw and exported files at the conclusion of the project. Be clear about how you will use the deliverables up front so the consultant can plan what software to use accordingly. Most consultants do not provide internal document production and contract with outside printers to print documents. In this digital age, consider eliminating printing or contracting with your own local printer and save those project costs for more consulting time in the budget.

### ***What should you expect when it comes to local government responsibilities?***

These are typical items included in contracts that outline a community's (as client) role:

**Background Information:** Consultants will need copies of all reports, plans, maps, drawings, aerial photos, data, and similar materials relevant to the performance of the scope of services. The list of such

materials shall be discussed and agreed upon at the project kick off meeting, but it is best to have this information gathered before initiating a new project or process.

**Additional Consultant Services:** The community is responsible for any professional, legal, engineering or accounting services connected with the project and shall coordinate review of any draft by the community's attorney, if necessary.

**Meetings and Engagement:** The community is responsible for scheduling meeting rooms, publication of agendas and notices, and the costs of publication for postings, notices, and mailings.

**Reviewing Materials:** The community should identify an individual who will be responsible for compiling reviews from all members of the project steering committee for communication to the consultant. The community should provide the consultant with decisions or reviews in a timely manner.

**Funding:** The community is responsible for communicating any requirements tied to funding. For

### ***Technology Tips***

A subscription to ArcGIS Online is helpful for sharing geospatial data not only with the consultant but also creating and hosting a variety of thematic maps for public consumption. Some communities rely on county GIS departments for this service.

COVID-19 has shown us the critical importance of being connected. Virtual meetings can save time and money for regular meeting and allow for broad, flexible public engagement.

### ***Keeping the Process on Track***

Responsiveness of the community is essential to maintaining the project schedule.

When it comes to engagement, consultants provide a wealth of experience and tools, but you know your community. Be prepared with a list of stakeholders and potential meetings.

Be sure to follow MEDC's protocol for utilizing their technical assistance funding with consultants.

### ***Resources:***

Planners in Private Practice (<https://www.planningmi.org/planners-in-private-practice>)

The Michigan Association of Planning created a guide to working with a planning consultant ([https://www.planningmi.org/assets/docs/pipp\\_brochure\\_single\\_pages\\_ma.pdf](https://www.planningmi.org/assets/docs/pipp_brochure_single_pages_ma.pdf))

APA's guide to "working with planning consultants" (<https://www.planning.org/publications/report/9026897/>)

"Hiring a consultant" (<https://www.planning.org/publications/document/9007634/>)

instance, grant funding may require the process or deliverables meet certain objectives and often requires specific reporting.

## **Project management and effective communication**

Making your consultant feel like part of the team requires some preparation. Just as the consultant will designate a project manager, so too should the community designate a project lead.

**Who is the primary point of contact?** Whether it is the manager or planning director, the community should identify a primary contact. This person should be available by phone and email to answer consultant questions. This person is also responsible for scheduling meetings and making sure the city upholds its end of the agreement.

**Core Working Group:** These project management responsibilities may be distributed between more than one individual. The structure should be clearly communicated to the consultant.

### **Example Core Working Group**

*Village Manager, Village Clerk, Planning Commission Chair, Zoning Administrator*

**Who is the day-to-day point of contact?** Are there additional contacts with specific project component responsibilities?

**Steering Committee Members:** Buy-in is critical to project implementation. Commissions often serve as natural steering committees, but it's worth looking outside the existing structures to identify partner organizations or active volunteers aligned with the project. It is important to set expectations for committee members. For instance, have the members

provided/committed to general availability? Do the members understand their roles and responsibilities?

**Key Stakeholders / Focus Groups:** It is the community's responsibility to identify key stakeholders. Are there specific stakeholders the consultants should meet with during the information gathering phase? Are there stakeholders who should be involved in the decision-making/adoption phase?

**Public Engagement:** Public engagement is unique for each project. Are there public meetings or community events that may correspond to project milestones and offer a venue for public engagement? Who will schedule meetings and facilitate logistics for public events? (securing location, providing refreshments) Are volunteers available to facilitate meetings/events? How will the public be notified? Do you need any support with promotional materials?

**Public Hearing:** Whether you are dealing with on-going services or project work, it is important to define the role of the consultant within the context of municipal board and commission meetings. Who will take the lead on the adoption process? When do materials need to be submitted for board/commission packets?

## **WHAT COMMUNITIES ARE DOING THIS?**

While some communities rely on county planning services and regional planning commission to support local planning and zoning, many communities hire planning consultants. Smaller villages and townships often hire consultants for zoning administration. Many larger communities also hire consultants for ongoing services. Communities of all sizes regularly engage planning consultants for project work.

This tear sheet was developed by the Michigan Association of Planning (MAP) for the Michigan Economic Development Corporation (MEDC). The Michigan Association of Planning is a 501 c 3 organization, dedicated to promoting sound community planning that benefits the residents of Michigan. MAP was established in 1945 to achieve a desired quality of life through comprehensive community planning that includes opportunities for a variety of lifestyles and housing, employment, commercial activities, and cultural and recreational amenities.

