



UMC GUIDE RECREATION PARKS & LEISURE

University of Missouri-Columbia Extension Division

Hiring Consultants

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This publication should guide recreators (individuals directly or indirectly responsible for delivering recreational services) in deciding both when and how to choose a professional consultant.

TYPES OF CONSULTING SERVICES

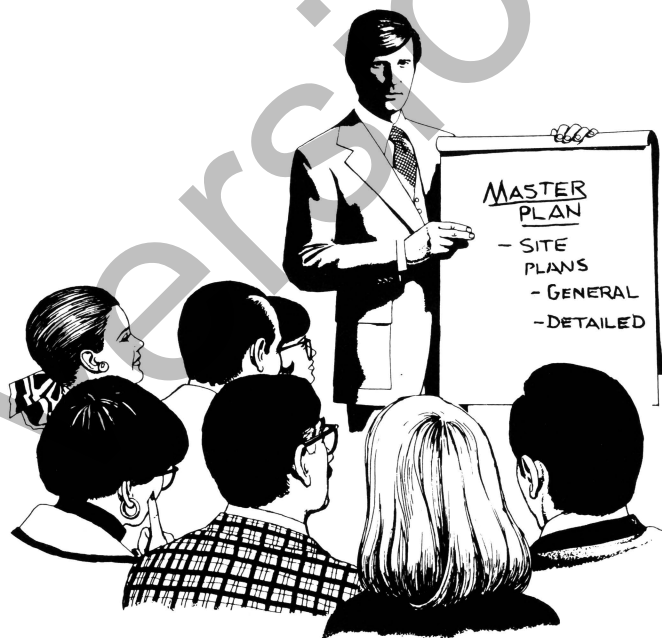
Consulting services most common to the parks and recreation field can be categorized into three areas: master plans, site plans, and field projects.

1. Master plans are comprehensive in nature and can be conducted concurrently within the framework of a political subdivision's or agency's overall planning effort. Master plans could be prepared on such projects as inventories of existing areas and equipment; analyses of facilities, activities or demand; determining growth patterns; financial considerations; and specific recommendations that include the establishment of priorities and the development of a plan of action.

2. Site plans can be of two types: master site plans or detailed site plans.

- Master site plans are general plans that reflect location of areas and facilities while adhering to established site planning criteria. The major provisions of the plan are to insure that (1) the purposes of the site are met through the relationships that exist among the park site and its surroundings, use areas, and major and minor structures. (2) A balance exists among dollars, human values, and impersonal and personal needs. Costs, aesthetics and function would be major considerations. (3) Appropriate and substantial experiences are provided by giving consideration to: the design aspects of color, form, line and texture; technical requirements; climatic conditions; and site resources (rock formations, flora). (4) Maintenance and supervision ease are provided by considering issues of: the balance between freedom and control, circulation patterns, operating needs, and safety in relation to both participants and employees.

- Detailed site plans are final plans with specifications necessary to implement the construction or development of areas or facilities as illustrated in the master plan. Supplemental items may be included such as bidding forms, contracts, and cost estimates. Final



detail plans should contain plans for construction, grading, irrigation, lighting, planting and site design.

3. Field projects are a wide range of studies or reports that may be conducted. They include environmental impact statements, grant applications, feasibility studies, interest or user surveys, materials testing, program analysis, facility or agency operations evaluations, and personnel selection.

Many park and recreation departments operate on the basis that the chief administrator, supervisory personnel, or maintenance personnel are qualified to acquire, plan or develop *new* facilities and programs. While this may be true for some departments, most departments have neither the staff time nor expertise to successfully plan and implement new programs or facilities. The results could be disastrous and departments may have to pay for expensive corrections of poorly designed areas or facilities or accept inadequate facilities.

Some board members and administrators actively resist the use of consultants on the premise that they are too expensive. Although this trend is changing, the

professional consultant has too often been considered a luxury rather than a resource to enable the department to deliver quality park and recreation programs. However, consulting firms can save money for a department over a period of years.

Before deciding to hire a professional consultant, clearly identify the problem and determine the actual services that will be required. If the recreation department staff cannot do the job, investigate services provided by local organizations such as area or county extension offices, the Department of Natural Resources, municipal recreation departments, university recreation departments, regional planning commissions, the Soil Conservation Service, and the University of Missouri Recreation Extension Division. If the service needed lies beyond the scope of these organizations, a professional could be hired.

SELECTING A CONSULTANT

If a professional consultant will be hired, the following procedure might be used to select a suitable firm.

1. Develop a project plan that includes:

- statement of the problem
- description of services required
- objectives
- general description of department's philosophy.

Do not include specific design concepts; design concepts and resulting details are responsibilities of the consulting agency.

2. **Contact firms** that appear qualified to perform the desired service by sending them a copy of the proposed project plan. Request selected firms (not more than six) to send written material describing their qualifications, and a written proposal on the scope of services they will provide. The following information may be requested:

- the educational background of the professional staff
- the professional affiliations of the firm and its staff
- the number of years of experience of the firm and its staff
- the firm's specialties
- the number and type of park and recreation related projects the firm has undertaken during the past five years
- the number of similar projects the firm was responsible for in the past five years
- the names of all park and recreation departments for which the firm provided services within the past five years.

3. **Evaluate the firms.** Based upon the above information, select the two or three firms that appear most qualified for the particular job.

4. **Interview the firms.** Invite the two or three selected firms to formally present and discuss their proposals. Additional criteria may be:

- clarity and comprehensiveness of the proposal
- their ability to communicate clearly
- degree of flexibility
- reasonableness regarding time and cost estimates
- ability to complete the contracted services within an acceptable time frame

5. **Select the firm.** Based upon the information in steps 2 and 4, choose the firm which seems most qualified to complete the contract successfully. Notify the remaining firms that another firm has been selected, and arrange a meeting with the consultant.

6. **Meet the consultant.** A meeting should be arranged so that an agreement can be reached on the actual work program, time schedules, responsibilities of firm and department, and appropriate fees.

7. **Review the contract.** The contract should be reviewed and approved by the department's legal representative and governing body before it is signed.

Remember that the department is under no legal obligation until the contract is signed. If a mutually satisfactory agreement contract cannot be reached, dismiss the firm in writing and negotiate with another.

CONSULTING FEES AND CHARGES

Historically, four basic methods are used to pay for the services of a consultant.

1. **Lump Sum or Fixed Fee:** This method is often used when the scope of work is clearly defined. It is most easily determined on single-element projects, not on highly complex projects. The client will know exactly what the services will cost.

2. **Cost - Plus:** This method is based on an hourly rate of pay plus expenses for work devoted to the project. The cost includes a flat hourly charge for personnel time, multiplied by an operational factor to provide for fringe benefits, overhead and a reasonable profit for the firm. This method is most often used when the scope of work is not clearly defined.

3. **Percentage of Construction Costs:** Compensation for this method is computed as a percentage of the total applicable cost of construction of the project for which the services are rendered. Be aware that: (1) fee schedules are usually on a sliding scale depending upon the nature and magnitude of the project; (2) fee schedules will vary considerably among professions and are generally based upon recommended schedules of the particular national organization or society; and (3) fees should not vary too widely between reputable firms *if* the project is well-defined.

4. **Retainer Fee:** Basically the same as cost-plus, this method is implemented when undertaking several projects or when consultant services are desired over a longer period of time (usually not exceeding one year).

Each project need not be separately negotiated. Both parties should understand the maximum number of hours of service to be performed per contract period, the rate of pay, per diem rate for travel and meetings, method and timeliness of payments, and provisions for cancellation or extension of the agreement.

A more recent trend is toward a customized compensation package, in which variations or combinations of each of the above are incorporated to best fit the budget constraints of the department. Most reputable firms are fairly flexible and willing to reach financial agreement on a contract.

Regardless of the type or method of payment agreed upon, understand the contract completely, and know what services and charges are included before signing it. The department's legal representative and the firm's representative should be willing to discuss any point.

Working Relationships

The time frame of the mutually agreed upon schedule can vary greatly depending upon the stipulations of the contract and type of project. A consultant should be expected to:

- Collect and analyze data necessary to complete the project.
- Meet with various community groups to provide input into the project.
- Meet with department staff on a regular basis to keep personnel informed of project progress.
- Document problems by plan, specification, or report, and present recommendations to resolve them.
- Discuss all proposed changes with the agency staff before implementing them.

- Cooperate in preparation and release of information through local media channels.
- Coordinate the presentation of graphic material to interpret the project to the public.
- Submit all documents, models, plans, reports, recommendations, and specifications on a timely basis.
- Relate directly to local conditions in consideration of proposed solutions. *National standards are not always appropriate for local situations.*
- Make on-going evaluations and adjustments to the project once they have a better understanding of local conditions.
- Allow department input into a plan before the proposed plan is completed.
- Request prompt payment for completion of incremental portions of the contract as agreed upon.

As with any relationship, allow time for a period of adjustment between the individual staff members of the consulting firm and the park and recreation department. The park and recreation department should appoint one staff member to be responsible for working with the consultant. This is not to disregard other department staff, for certainly their input is highly desirable; it is to avoid any confusion regarding who is to be sought when decisions are needed.

The suggested guidelines should familiarize the recreator with a procedure that will assist in selecting the best qualified professional consultant for particular circumstances. It is the responsibility of each agency or its designated personnel to carefully weigh the various documents and data relevant to the qualifications of the various consulting firms before making the final selection.

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