

The Private Consultant in Public Planning

Interviews with Glenn Harbeck and George Chapman

C*arolina Planning* invited Glenn Harbeck, a private consultant, and George Chapman, a public planner, to give their views on the role of the private consultant in the practice of public sector planning. Harbeck is currently a consulting planner with a practice focused on community involvement based planning. He holds a Master's of Regional Planning from the University of North Carolina at Chapel Hill. Chapman is Director of Planning for the City of Raleigh. He also holds a Master's of Regional Planning from the University of North Carolina at Chapel Hill. These interviews appear below in facing columns.

Interview with Glenn Harbeck, Private Consultant:

How much of your work is done for public agencies?

Almost all, if you include non-profits and universities together with city, county, and state governments. Most of my work is with cities and counties. It's probably 90% cities and counties and 10% in non-profits, public universities, state government, and private companies.

Do you think private consultants are more common in public planning now than they used to be? Why or why not?

It varies tremendously from agency to agency. Some communities regularly employ consulting planners, while other communities employ them much less often. If you look at the number of calling cards in the back of *Planning* magazine, you would have to say more on average. Many of my client communities hire me because they're so busy putting out fires that they really don't have time to give proper attention to long range issues or strategic planning issues—kind of a “where are we headed as an agency and as a community.” Also, some public agencies are feeling pressure to do more with a smaller staff, and rather

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How often does your agency deal with private consultants?

We handle relatively few private consultants in the planning department. We may do as many as three to five in a year. That varies greatly depending on the work program. We typically retain private consultants for very specialized kinds of work. There might be a consultant to do the design work on the layout and format of publications we're doing, and we currently have a consultant studying a series of signage proposals for the downtown area, but we rarely use consultants to do land use planning work. It's almost all done by the staff. I would think you would find a smaller agency more likely to hire a consultant to assist them with a comprehensive plan or area plan or something of that nature.

Do you use private consulting planners more or less now than you did in the past? What have been the trends over time?

It's pretty much stayed the same, but I think we probably use them for different purposes now than we have in the past. We probably use private consultants more for technical assistance now rather than

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than add on another permanent staff position, they are inclined to hire outward to a consultant. My first full-time job out of graduate school was in the area of long range planning and policy analysis. Speaking from that experience fifteen or twenty years ago, even then you were often pulled off your responsibilities as a long range planner to help fight the current planning fires. And I don't think the situation has changed all that much.

How would you describe the role of the private consultant in public planning?

If you look at the role of the private consultant from the public planning agency's perspective, I'm oftentimes viewed as an extension of the staff for a particular project for a particular period of time. On the other hand, I'm also viewed as an independent advisor or outside expert by the public at large. Whether that's the reality of it or not, that is the perception that oftentimes the public has. I view my job as probably about 9/10 the former and 1/10 the latter. I really prefer to work as an extension of the staff and be part of the team.

What are the advantages of being a private consulting planner?

Having worked in both public agencies as well as in private practice, I would say that the primary advantage is not being hampered by the constant demands and interruptions that a public agency office can experience. You're not working quite as much in the fishbowl. You still have the same obligations to the work that you do in the fishbowl, but I don't think you're viewed as being quite as accessible all day long with phone calls and people just dropping in. That was clearly some of my experience working in public agencies. It's just a question really of daily productivity versus the number of interruptions.

I would like to talk about one other advantage. Many times the clients that I'm working with are carrying "baggage" with them when they go into a public meeting, whether they want to or not. I use the word baggage in quotes, meaning that many public planners are put in the position of having to say no, and when you say no you're going to make somebody unhappy. You're either going to make a devel-

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assisting in policy planning. In the past they may have been more active in the policy planning area, but our staff is now more geared to handling the policy planning and related activities. There are fewer long range planning studies now underway than there were in the past, and so our need to supplement the staff capacity is less. On the other hand, we would still rely on a consultant for a highly technical or highly specialized kind of analysis that we wouldn't have the staff capacity to do.

How would you describe the role of the private consultant in public planning?

Today, we look at private consultants as supplements to our staff for technical capabilities that we do not have in-house. For instance, we would use a consultant for the development of a computer program or some software to perform an analysis with. The consultants are more likely to be specialists of some type as opposed to general planners. They might be economists, they might be GIS specialists, they might be urban designers, but they're not likely to be general planners.

For instance, we've hired consultants to do economic base studies. We've hired consultants to help us in the layout and format of the design of the comprehensive plan—they're almost like publishing specialists, if you will. We've used consultants to design our GIS system. The Planning Department has used consultants to develop historic district nomination documentation. Right now we have a consultant under contract to design a system of signage for the downtown area, a graphics system basically.

What are some of the advantages of working with outside consultants?

For the advantages, again, I'd break the consultants roles into two basic types of roles. One would offer technical assistance and the other would supplement our professional capacity, and by that I mean just to handle workload. The biggest advantage of professional planning assistance is to stretch your staff capacity when you have a workload peak kind of situation. We occasionally do that, and as we are downsizing and as other agencies are downsizing I think that's likely to happen more. Where you have

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oper unhappy who has grand plans for a particular project, or you may make the neighborhoods around a particular development unhappy. You're oftentimes caught in the middle of a difficult situation, and through no fault of your own as a public sector planner you end up carrying that "baggage" with you. And I don't mean that in a negative way at all—I'm just saying that that is a circumstance that a public sector planner has to deal with. I often see the public treat the public sector planner unfairly because the agency itself may have a perception in the community as having a particular agenda or having been too kind to developers or whatever the case might be. It's no fault of the individual and it's really no fault of the agency, it's just the public's perception. When you're making tough decisions every day you have to say no occasionally, and maybe that's a disadvantage of working in the public sector.

What are the disadvantages of being a private consultant?

They are primarily related to time. In the advantages section I said that you're constantly being interrupted as a public sector planner. Well, as a private sector consulting planner you also have time problems, but they're problems of a different kind and they're mostly related to time away from your family or your personal life and friends. You're waiting in airports or spending consecutive nights in hotels or motels, or you're driving at night between communities, or you may just be keeping up with the books or preparing for conferences or presentations. Those kinds of continuous demands on time can stretch an ordinary 40 hour workweek into an average 55 to 65 hours per week. This is time doing the extra work to keep a practice up to snuff. That's not to discount the fact that when I was in the public sector agency we certainly did have a lot of night meetings with the subdivision review board or the historic commission or planning board or city council or county commission, but at least when the meeting is over you go home.

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some kind of peak demand for doing a series of studies you would need to supplement your staff, and the advantage of doing that is that you don't need to bring on staff either permanently or temporarily and manage that staff. You're able to manage your workload or handle peaks in your workload more efficiently.

I used to feel that you would never hire a consultant to do a long range area plan, but in some instances it may be the best thing to do.

What are some of the disadvantages of working with outside consultants?

I guess the down side of using consultants to supplement your regular staff is that there's often a great deal of time and money involved in bringing the consultants up to speed on whatever the issue is because they are not familiar with the nuances of it. I guess pretty much those are the same advantages and disadvantages of using a technical specialist. Obviously, you don't have to hire somebody, and those kinds of specialists are usually not around, are usually not available, and probably are not likely to want to work in a planning agency. It's not their goal. Another disadvantage of a consultant in that role is that when the consultant is not available you've lost your capacity. In other words, it's only a temporary assist for you. For instance, I'm thinking about the field of demography and economic analysis. If you bring on consultants to do a series of population analyses and forecasts for you, that's great as long as they're around, but once they're gone you only have the written documentation.

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How do you negotiate your role with the public agency that you are working for?

I would say that "negotiating your role," is done very, very early in the process, perhaps even in the consultant selection process. You pretty much know whether there's a compatible chemistry between the client community and the consulting planner. I've been very fortunate in the communities that I've worked with, because I think we've had good chemistry and we've both viewed my role as an extension of the staff. I'm usually treated as a member of the planning team rather than as an outside "expert." I've found that the old style consulting expert is really a counterproductive role.

Are there some tasks you feel a private consultant should or should not do?

Nothing really comes to mind on one side or the other. I think probably the best reasons for hiring a private consultant are to 1) alleviate some of the workload burden, and 2) perhaps bring in an independent perspective, somebody who doesn't have any perceived vested interest in a particular issue in a community. Most public sector planners do their very best not to take sides in their work, but they're frequently perceived as taking sides by the public. I don't have as much of a problem that way.

Getting back to the team approach and the planning department team, my feeling is that the consultant should only take recommendations forward as part of the planning management team. In other words, if I'm operating as part of the planning staff, then I wouldn't take my recommendations forward to the Board or the Council as an independent consulting planner any more than if I was a staff planner trying to take recommendations forward without having first discussed those recommendations with the planning director. The analogy is very similar. Occasionally you will find a community or a particular board that wants the consultant to bring his or her recommendations forward independent of the staff, and I find that generally to be counterproductive. I find that it's much more effective if you're operating as part of the planning department team. I mean, after all, who's going to be asked to implement those recommendations? It comes right back to the planning department,

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How do you determine the role of the private consultant as a supplement to your staff? Are there some tasks you would never want a consultant to do?

I doubt that there are many things that are quite that black and white because it often just depends on the environment you find yourself in. For instance, you might on some occasions choose to hire a consultant to handle a particularly delicate political issue, something that is volatile in the community because the consultant can remove the staff from that political volatility. Otherwise the staff may become seen as an advocate for one or the other sides of the issue and run some danger of losing its effectiveness and objectivity. I think you can paint that picture the other way and say that there are some issues that are so sensitive that you probably should not use consultants for them because they might not be able to handle the shifting public opinion in the community if they're not aware of it or don't know how to read it—it could get you in more trouble than you're getting out of. So you have to make a decision about that given the particular issue that you're dealing with. I used to feel that you would never hire a consultant to do a long range area plan for you because once they're gone there's no capacity to continue to apply that plan or to evolve that plan as conditions change. But in some instances it may be the best thing to do. I think you just have to make a judgment based on the complexity of the situation, what your staff resources are, what their capabilities are, and what the political environment is.

What do you do when you do not like the product a consultant produces?

Well, you really should never get into that situation. What I mean by that is that in working with a consultant I don't think you can ever give a consultant a task and tell him to come back and show you the finished product. I view the consultant's role in working with the planning staff as an extension of that staff and there has to be continuing relationship with them during the course of the project just as you would oversee a project done by your own staff. You need to take that role with consultants as well and so there have to be constant check points during the

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so the planning department has got to feel very comfortable with those recommendations.

What do you do if the public agency you are working for is not happy with your product?

The way to avoid that is by involving the decision makers on the front end of the process. I call it "front-end loading." I believe that in order for people to agree upon the course of action at the end of a process, they've got to agree on the process itself in the beginning. So if you want to avoid having a plan shot down at the end, you'd better be sure about what people's priorities and concerns are on the front end. To answer your question more directly, as a consulting planner you're in a service business. And if you got into a situation where a public agency was unhappy with your product you'd have to do your best to determine what the specific concerns were and how to fix them. If you don't do that you're probably in the wrong line of work.

What are some of the most common problems you have encountered in working with public agencies?

I can't say that I could identify anything that could be called a common problem. Each project is different and thankfully all of us are different in the way we do things, which keeps things interesting. In each project you're going to encounter problems along the way that you need to work through. Again, I think the important thing is to establish the chemistry and the common objectives at the beginning of the process and get people involved on the front end. If you do that, the chances of having problems are really minimized. Planners have to be communicators. We communicate in our public presentations, we communicate in the reports and ordinances we prepare, and we communicate in smaller group meetings. Like anything else, things can be miscommunicated. The better a communicator you are, the more effective you'll be as a planner.

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course of the effort to make sure that you're still on target with your goals, objectives, time frame, costs, and everything else. Certainly you're going to occasionally get a consultant who comes to a conclusion that you don't agree with, but working closely with the consultant during the whole course of your effort is going to reduce the likelihood of that happening. You are their client, and they need to be responsive to you and your needs. That's kind of a basic relationship. Certainly there's room for professional disagreement, different conclusions that are properly justified, but you may not be too unhappy with it if they're professionally done and properly documented, even if you disagree with the conclusions. It would be foolish to say it's not going to happen—sometimes you're going to get into a situation with a consultant where they're not doing the work on time or their work is not satisfactory, but I think the closer you are to your project the sooner you're going to identify that. And if you can't take steps to remedy that situation, then you terminate your relationship with the consultant. But that shouldn't happen at the end of the project.

What are some of the most common problems you have encountered in working with private consultants?

I don't know that there are recurring or common problems. The thing you have to be most careful with is making sure that they do not become clients to a public group or a private interest group or some other entity. You are their client. You have to make sure that as the planning agency you know you are playing the central role in the decision-making process—developing alternatives, assessing the consequences of them, trying to advise your governing body—and that the consultant doesn't take that role from you. You have to have a very clear understanding at the beginning of a project by making it clear as to what kind of check points during the course of the project they are responsible for coming to you, and you have to follow through on that.

I think managing a consultant is probably the thing that most planning agencies underestimate the time and need to do. You often think, well these folks are well known or well regarded competent professionals, you shouldn't have to worry about that, but they are like any other resource, staff or otherwise.

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What can public agencies do to improve their relationships with private consultants?

The most effective working relationships that I've had are with those clients who really involve me as a full member of the planning staff team for the duration of the project. So the answer to your question is: anything that can be done to improve the ability of the staff to involve the consultant as a member of the team is going to help the project. It could even be something as basic as involving the consultant in the preliminary discussions or thinking about what the project entails as far as both the process of preparing the product and the final product. For example, if a public agency is hiring a consultant to prepare a comprehensive plan that will require a public planning process, it's really good if the public agency can allow the consulting planner to have a free exchange of ideas on what that public planning process might be, rather than putting it all down to the n^{th} degree as part of the request for proposals. What I'm most interested in is what are the client's objectives. What does the client want to achieve at the end of the process? If we can agree upon the objectives first, just like in a good planning process, then the process to achieve those objectives can be tailored to fit.

Most planning agencies have regular staff meetings, troubleshooting meetings, or advanced planning meetings. If those meetings happen to be being held on a day when the consultant is in the community or can be coordinated in such a way that the planning consultant would be in the community on those days, it really helps the consulting planner to understand the full range of problems that the planning agency is facing. It also helps the consulting planner understand where his or her particular project fits into the bigger picture of the agency's responsibilities. Another way would be for a consulting planner to sit in on a planning board or city council meeting, not with a particular objective in mind but to gain some insights into the particular dynamics and political structure of the community.

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They need to be viewed in a management context and you have to know what your resources and time limits are and operate within those things. In the short run, consultants may not be less time-consuming than hiring staff, but in the long run it may be advantageous to you because once you bring on a staff person, for instance, you have a long-term responsibility to that person which requires a lot more investment in the long run.

What can private consultants do to improve their relationships with public agencies?

I think basically they need to listen to their clients' needs and make sure those are carefully defined at the beginning of the project. The agreement—whatever that is, contract or whatever form the agreement is—is very specific as to what the time frame of the effort will be, what the end products will be, and what checkpoints along the way there will be to measure the progress of the project. Make sure there is attention given at the beginning to the details of the work program—don't just rush into the relationship because you're impressed with how they've done something somewhere else. That's good reason to consider them, but once you understand they're somebody you want to consider it's important to be detailed about the time frame, the resources, the checkpoints along the way.

I guess one big caution for public agencies working with a private consultant is to make sure you know the staff resources that are going to be available to the project. You often get a proposal with a list of twenty highly competent resumes, but you need to know who they will specifically have on the project and who will be responsible for the consultant's work. There needs to be one person—the project manager—playing that role. You always have one person you deal with for that project. They may have a half dozen working on that project, but you're not the supervisor of those people, and you can only be effective if you're working through their supervisor, whoever that is. On the consultant's side, they can make sure they are speaking through one person, one contact, and that that project manager is always available to the client.

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What do you see as the biggest differences between working as a private consultant and working as a public sector planner?

Speaking only from my own experience, I would say that the “business” side of consulting is a real eye-opener in terms of the particular set of skills required. They are quite a bit different than the planning skills that you learn in undergraduate or graduate school or on the job after that. And to bring it home, you have to have the confidence to know that next year’s salary is going to come from somewhere. You just don’t know where. There’s clearly not security, so to speak, whereas when I was working for a city agency or when I was working for a larger corporation there is some security in knowing that there’s a salary somewhere with your name on it.

I think if I were to go back into a public agency today I would still employ the same fundamental processes, techniques, research skills, communication skills, public speaking skills, and writing skills. I don’t think that would differ.

You have to be able to act with a great deal of self-motivation and discipline and a love for what you are doing.

Do you think there are any skills that are especially important for private consultants to have?

You’re using the word “especially” in the question and I guess I’d have to say you have to be especially focused. You have to be able to focus on the task at hand. There’s not a structure around you that’s going to ask you to do something at a certain time. You have to be able to act with a great deal of self-motivation and discipline—time management—and a love for what you are doing. Again, though, a lot of those things would apply equally well to a public sector planner. But for especially important skills, I

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What do you see as the biggest differences between working for a public agency and working as a consultant?

I think it’s your perspective on the task in front of you. I think as a public agency employee you have a broader and longer term commitment to your community and can put the project in that context. The consultant has the, I would call it luxury at times, but really it’s a valuable asset, which is to bring perhaps a fresh and more detached perspective to the task. And probably bring knowledge from other experiences that the local planner would not have. I have worked as a consultant, and while ultimately I find it more satisfying to be a local planning agency person, I think that’s kind of an individual judgment people are going to come to based on their personalities. There’s value to both sides and both roles, but from my personal perspective the local agency planner has a longer term commitment to his client, which is his community. I think you shouldn’t try to decide between which side of the market you want to be on until you’ve worked on both sides because even if you find you’re far more satisfied with one than the other, having worked on the other side gives you a better understanding of what the issues are on that side of the fence. If you’re a public agency person and you’ve been a consultant I think you’re going to be more effective in working with consultants and vice versa.

Do you think there are any skills that are more important for public agency planners than for private consultants?

I would be tempted to say the public planner has to have more patience and a more long-term perspective. I think the necessity to compromise is greater for public planners because of their longer term relationships with their clients. They have to be able to see both sides of the issue and be able to accommodate conflict, whereas I think a consultant can be more of a purist and probably should be less prone to accept compromise solutions to problems. And a consultant can perform a very valuable function to make a recommendation that’s not accepted by the community. In the course of doing that, public planners might really compromise their abilities to be effective in other arenas. Again, I think that’s a place where

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would say focus, concentration, discipline, time management, and motivation.

I would encourage anyone to work for several years in a public sector agency to learn the work first-hand and to come to know the intricacies of working in the public agency and the relationships between staff and board or council. Those kinds of fundamentals serve you well. **GP**

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a public planner will choose to use a consultant and might find a consultant very effective.

I think that the hard technical skills of economic and demographic analysis are probably more valuable in a consulting agency than in a public agency. That's not to say you don't need them in a public agency, but if you're a real quantitative analyst you'll find more application for that in a consulting role. You know, if you think about doing an environmental impact statement, that can be an enormously complex scientific investigation, and that kind of a detailed analysis is probably much better done by a consultant than by most public agencies. Public planners would be more capable of synthesizing a variety of ideas and are more comfortable with being generalists. That's not a completely black and white situation, you know—you get into some public agencies, for instance at the federal and state levels, and you can be a highly specialized technician in a public agency. There are water quality specialists within state environmental agencies that are highly specialized. A transportation planner who is really into modeling and has the capability of developing the models as well as applying them would probably be more satisfied in the long run in a consulting agency. You probably don't find that in many local public agencies—those people are more likely to be found in a consulting role, a private consulting role. But you know, we've got transportation planners who are whizzes at modelling too. **GP**