

“Managing Consultants” Outline

WEB-BASED INSTRUCTION PRIOR TO IN-CLASS INSTRUCTION

Course Introduction

- Purpose of the Course
- Overview of the curriculum and format
- Goal and Learning Objectives

The Complaint Department

- EXERCISE : The Problem with Consultants
- EXERCISE : The Problem with Owners

Getting the Right Consultant

- Initial screening and short-listing
- When to use an RFQ, and/or RFP, or neither
- Conducting the interview
- Differentiating among consultants (all of whom look alike!)

Inadvertently Influencing the Selection Outcome

- EXERCISE: Stacking the Deck...Inadvertently
- Common methods that unintentionally bias the selection

Developing the Owner-Consultant Partnership

- Interdependence between the Owner and consultant
- Measures of success for consultants and owners
- Project Goal-setting
- The importance of other stakeholders in the owner-consultant partnership
- Building and maintaining trust between the owner and the consultant
- How personalities affect the owner-consultant relationship
- Recognizing dysfunction in the owner-consultant relationship
- Handling conflict in the owner-consultant relationship
- Managing expectations in the owner consultant relationship
- Key elements for building trust
- EXERCISE: Building Trust

Getting a Fair Price

- Joint development of the work scope
- How to use the WBS to manage and control scope
- Incorporating performance standards and communicating the expected level of excellence
- Converting goals and general project descriptions into consultant work requirements.
- Making sure there are no “holes” in work scope responsibility

- What should be the relationship of Project Management time to technical time?
- How much clerical time is appropriate?
- How much time should be spent by a consultant on managing subconsultants?
- Should preparation of invoices be billable?
- Using multiple methods to estimate cost
- The relationship between method of compensation, payment, risk and price
- How fee bases affect price
- Understanding cost and pricing jargon
- Use of phased contracting
- Retainage (both a risk and a cost to the consultant)
- Understanding the relationship between risk and price
- Understanding the relationship between risk and scope
- Optimizing risk and price
- EXERCISE: Estimate the Cost of a Consultant Project

IN-CLASS INSTRUCTION

Getting On-time and On-Budget Performance

- **Establish the Schedule**
 - Use and importance of the WBS (or Master Deliverables List)
 - Making timing needs clear during the consultant selection process
 - Explaining project timing in detail during Chartering, Partnering, or Kick-off Meeting
 - What to do if a consultant consistently misses achievable deadlines
- **Auditing a Consultant-Prepared Critical Path Schedule**
 - Logical sequencing of tasks
 - Identification of the critical path
 - Identification of what may become the critical path
 - Meaningful milestones
 - Realistic Owner/stakeholder/public activity periods
 - Identification and use of contingency
 - Resource leveling
 - EXERCISE: Audit a Consultant's Schedule
- **Auditing a Consultant-Prepared Budget**
 - Conformance with the WBS and Scope of Work
 - How to discern what risks the consultant sees but hasn't articulated
 - Auditing a consultant's budget for realism
 - Auditing a consultant's budget for manageability
 - Deciding what and how much to audit
 - EXERCISE: Audit a Consultant's Budget

- **Monitoring Performance**
 - Monitoring Scope Conformance
 - Methods to assure Scope compliance
 - Monitoring Schedule Conformance
 - Monitoring Budget Conformance and Earned Value
 - Periodic Reporting
 - EXERCISE 2-3: What Should Be Reported?

- **Managing Change**
 - Expect scope changes
 - Use the Change Process to handle changes in a routine manner
 - Use of Contingency Diagramming to help anticipate change
 - Use of a budget reserve (a.k.a., management reserve or unallocated contingency)

Getting a Quality Product and Service

- Using the Root Cause Analysis technique
- The Problem with Owners (from the Consultant's Perspective)
- Establishing Critical Success Factors
- Assuring quality through a Quality Management Plan
- Communicating expectations
- Communicating standards
- Motivating consultants to a higher level of excellence

WEB-BASED INSTRUCTION AFTER IN-CLASS INSTRUCTION

Integrating the Learning

- Summary of key learning
- EXERCISE: Plan to Get the Right Consultant
- EXERCISE: Communicating Expectations and Standards for Your Project
- EXERCISE: Interpret Current Performance Indices and Cost-at-Complete for Your Project
- EXERCISE: Design a Periodic Partnership Evaluation and Improvement Process for Your Project

Ethical Behavior

- Principles of ethical behavior in the Owner-consultant relationship
- Codes of ethics:
 - American Institute of Architects
 - American Society of Civil Engineers
 - National Association of Environmental Professionals
 - American Planning Association
 - American Consulting Engineers Council
- EXERCISE 3-6: Case Studies in Ethical Behavior