

Working with Public Engagement Consultants: Tips for Local Officials

www.ca-ilg.org/PEConsultantTips

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In planning and implementing public engagement activities, local officials often contract with external consultants for services. These may be consultants who design and lead activities devoted solely to public engagement, such as a series of community conversations contributing to the development of a local agency budget. Or they may be consultants who carry out tasks well beyond public engagement alone, such as assisting in the overall development of a general plan update.

Few resources exist to help guide local officials in the best use of public engagement consultants. Therefore, the Institute for Local Government, drawing on the experiences of both local officials and consultants, has compiled the following set of recommendations.¹

Of course before hiring any individual or firm, it is important to ask for references and to check with your colleagues in other counties or cities about their experiences with the consultant. Requested competencies and deliverables should be spelled out clearly in an RFQ or RFP. Check with your local agency attorney about questions relating to any specific hiring process.

Before You Hire (Do Your Homework)

1. Before hiring a public engagement consultant, the appropriate local officials and staff, along with any community member partners, should clarify the *purposes* (or outcomes)² and the important *participant* groups/categories³ for the planned public engagement activity. This clarity will help you to better identify your consultant needs and to prepare any appropriate Request for Proposals (RFP) or Request for Qualification (RFQ).⁴
2. In some cases, the agency may also wish to develop a general outline of its desired public engagement *process* (as well its *purpose* and *participants*) in order to better solicit and identify the most appropriate public engagement consultant.⁵
3. While a public agency will choose the most appropriate consultant if it understands its own public engagement purpose and participation goals, inviting consultants to draw on their experience and propose their ideas will typically result in a creative and responsive public engagement process that can best achieve the desired goals and outcomes. The intent should be a balance between clear intent by the local agency and openness to the public engagement recommendations of consultants.
4. At times, a local agency may wish to identify a consultant to help the agency develop an understanding of a complex issue or controversy and then to recommend a public engagement strategy. This can be an especially useful approach for an issue outside of

typical local agency decision-making channels. Consultants may also be asked to assess present practices and recommend improvements to a local agency's ability to engage specific communities/populations.

5. Identify the specific deliverables you will ask of potential consultants. Among other responsibilities, these may include: a review of materials; interviews with key stakeholders; the identification of groups, communities and others who may be the focus of an engagement process; the design of a public engagement plan; the facilitation of engagement activities; participation logistics; communication with local agency representatives, participants, the media and the public; meeting or materials preparation or translation; recording and documenting public input received; the ongoing assessment and adaption of engagement activities as needed; participation in a final review of public engagement effectiveness and outcomes; and other activities as appropriate.
6. The agency would do well to review its past public engagement activities. What have been the experiences to date? Are there any previous evaluation results that can shed light on the appropriate criteria for any RFP/RFQ to be developed, or for the overall search and selection process? Is there a challenging history with a given community/population that suggests the need for extra, and perhaps early, efforts at education and engagement?
7. Public engagement consultants are not interchangeable. They come from a variety of disciplines and backgrounds and may have worked in a narrow or a very broad range of issue/policy areas. They may have built their knowledge and practice around specific public engagement strategies and tools, or they may have experience with many different approaches. Be aware of important distinctions in consultant approaches and experience, and identify a sufficiently broad pool of candidates that will result in a consultant that will meet your needs.⁶
8. Be realistic about the resources your agency will have to commit to create a public engagement plan and activities that are likely to achieve your purposes. As with much else, public engagement results are linked to the time, work and resources committed.
9. Have the consultant in place well before the dates of your planned public meeting(s). This improves planning and design, allows the consultant to accomplish important preparatory tasks, and significantly reduces the possibility for problems to arise.

Selecting a Public Engagement Consultant

10. Conduct interviews with potential consultant candidates to become acquainted with their (or their firm's) skill sets and experiences, as well as the models or approaches they would use to respond to your agency's public participation needs. This provides an opportunity to compare and contrast general approaches.
11. Be open to a consultant's ideas for public engagement approaches that are different from those initially assumed most appropriate by your agency. Through such openness a local agency may understand more options, ultimately save time and money, and increase its ability to choose the most appropriate public engagement consultant and approach.
12. Ensure that the consultant has the necessary process design and delivery experience as well as any relevant issue/policy knowledge that will be required.⁷

13. In some cases, two different consultants or firms working together may bring the best set of competencies to the job. This can be the case when one consultant is especially skilled in successfully engaging a specific community or population group. Or where required competencies in content and policy knowledge and in process design and facilitation cannot be found in one consultant. This may require some additional staff oversight to ensure a good integration of efforts.
14. Don't confuse public relations consultants with those who design and deliver engagement processes that seek to integrate the public's ideas into local decision-making. While both types of consultants can be helpful, they usually have different skill sets.
15. Weigh the ability of a potential public engagement consultant to act and to be viewed by the public as an impartial facilitator on the matter to be addressed by the public engagement activity. Such impartiality can help ensure public trust in the process.
16. Ask about the consultant's experiences with public agencies similar to yours; with those participants/communities you wish to engage; and with the issue that your proposed public engagement effort will address. A lack of directly applicable experience may not rule out a consultant for consideration, but it is important information nonetheless.
17. Assess the potential consultant's experiences with public engagement approaches that will address your local agency's purpose and participation goals. Flexible practitioners who can mix and match public engagement activities and processes from their overall skillset may offer more choices for the public to get involved and a greater likelihood of reaching various participant groups.
18. As appropriate to your agencies' interest in using social media and other online technologies, ask potential consultants how they would effectively utilize these tools to reach and engage residents.
19. Realistically assess the claims made by consultants for the outcomes of their proposed public engagement plan and activities. Do these make sense given the issue or policy to be addressed, the time and resources to be committed, the nature of the recommended approach, the number of proposed participants, and any political or other relevant factors.

The Consultant Contract

20. The contract should be explicit about the consultant deliverables and timeline, accountability to the local agency, and working relationships and communications with local agency staff. It is particularly important to clarify the supportive work that agency staff will play through the full term of the consultant contract.
21. Ideally, there should be some flexibility in the contract to allow adaptation to the specifics of a public engagement plan and deliverables. Such adaptations may be informed by the consultant, by public input, or by further reflection by the local agency.
22. Contracts should clarify any responsibilities of the consultants in efforts to review and assess public engagement activities for effectiveness and lessons learned.

23. It is also important to clarify in the contract any consultant responsibilities for the recording, documentation, reporting and/or distribution of public ideas and recommendations that emerge from the public engagement process.
24. Be sure to clarify who should be contacted when members of the public have questions. Will members of the public contact the consultant or a local official?

Using Public Engagement Consultants Well

25. Ensure a close and collaborative working relationship between the consultants and appropriate agency staff, with regularly scheduled times to share information, to check in on the status of deliverables, and to problem-solve as needed. Avoid surprises.
26. Make sure that all relevant local agency staff are kept informed about the status of the consultant's work and the public engagement efforts overall. This should include public information/communications staff, as a good communications plan can increase the benefits of public engagement efforts.
27. Don't ask public engagement consultants to play roles that are more appropriate to local officials. When the public engagement process is being presented to the public, the appropriate local official(s) should describe the consultant hiring process (as appropriate to the setting), the role and responsibilities of the consultant(s), how local officials and public bodies will be involved, and how public input will be used in ultimate decision-making. Beware of "setting up" the consultants by a failure of local officials to clarify and carry out their own important roles in making a public engagement effort successful.
28. When consultants (or local officials) are presenting the planned public engagement process to community residents, especially early on, encourage them to discuss the *values and purposes* of public engagement and not only the techniques and approaches. It is also important to clarify how public input will be used by the local agency decision-makers.
29. It is usually helpful to hold a final "wrap up" session with the consultants to discuss and assess outcomes and lessons learned. Depending on the specific circumstances, such sessions may involve staff, elected officials or the public. If members of the governing body are involved, such sessions are best held in public.
30. As appropriate, take advantage of opportunities for consultants to train local agency staff in appropriate public engagement skills. This can add new capacity to both present and future public participation efforts.

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For more information and to access the Institute's resources on public engagement, visit www.ca-ilg.org/engagement. To access this resource directly, go to www.ca-ilg.org/PEConsultantTips.

The Institute welcomes feedback on this resource:

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¹ It may be helpful to review other Institute for Local Government materials for additional background. Particularly see our *Principles of Local Government Public Engagement* (www.ca-ilg.org/publicengagementprinciples).

² For instance, a primary public engagement purpose/outcome may be to determine the community's preferences for services as part of a local agency budgeting process, or to develop the specific elements of a general plan update with input from the general public and organizational stakeholders.

³ These may be specific neighborhoods, ethnic groups, renters, homeowners, age or other demographic categories, businesses, congregations, etc. Clarity about *who* you want to engage helps the local agency (and the consultant) identify appropriate public engagement processes or activities.

⁴ Generally, for this purpose, a request for qualifications (RFQ) seeks a description of a consultant's interest, experience and credentials; while a request for proposals (RFP) elicits specific bids from potential consultants for the services desired.

⁵ However see related points #3, #4, and #11.

⁶ Also see tip #11.

⁷ As it may be difficult to find a consultant that has all the qualifications you seek, you may wish to set priorities among various consultant criteria, or combine consultants (see #13).