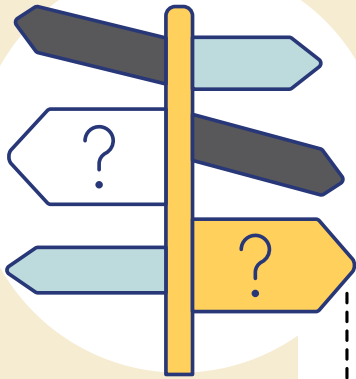


# Choosing a Consultant

If you choose to work with an outside professional to facilitate your process, here are some things to consider.



## Training and Competencies

- Certified or trained to lead strategic planning
- Skilled at identifying the key questions facing the organization
- Knowledgeable of facilitation techniques to invite all voices into the discussion and move the process forward
- Understand various approaches to strategic planning
- Factor in existing information (mission, current plan, etc.)
- Culturally competent to work effectively with diverse groups and able to integrate your DEI goals into the overall strategic plan

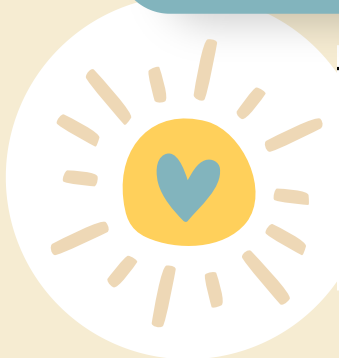
## Knowledge and Background

- Have a history of working with nonprofits
- Understand organizations of your size
- Familiar with your mission, community, and state
- Recognize the importance of customizing to you
- Provide references for you to contact



## Character and Personality

- Care about your cause and share your values
- Seek to learn about your organization
- Communicate in a manner with which you align
- Co-create the process with the board and staff team



# Self-Guide for Preparation

Things to consider for your organization's strategic planning process



## Planning Team

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Create a list of potential members of the planning team to guide the process. (Typically board & staff - may include stakeholders)

## Timeline

Start the process far enough in advance to allow time for all stages of the planning.

## High level planning stages

Prior to budget year

Place planning expenses in budget

6 months before

Form the planning team & set date

5 months before

If you will work with a consultant, hire

4 months before

Plan the process, assess data needs

3 months before

Seek stakeholder feedback & compile

## Stakeholder Engagement

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What individuals or groups have an interest in your organization and a stake in your success? (clients, volunteers, donors, community partners etc.)

## Data

What data do you have in place that helps to paint a picture of your organization?  
What might you need to gather as a part of the strategic planning process?



## Here's what we have!

- Client feedback survey
- Agency strengths/weaknesses
- Community needs assessment
- Trends analysis
- Organizational history - other data
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