

# STRATEGIC PLANNING TIPS

## TIPS FOR CONTRACTING WITH A STRATEGIC PLANNING CONSULTANT

A professional planning facilitator will help your conservation district (CD) make the best use of your strategic planning process and time. A facilitator can help you design the best approach for your planning session, facilitate all aspects of gathering input, facilitate your meeting, keep everyone focused and on track, provide objectivity, ask the tough questions, and make sure everyone is heard.

When hiring a strategic planning facilitator, make sure they are well-versed and experienced in helping organizations craft strategic plans; this is an investment in the future of your conservation district (CD). The following tips to help you navigate the process of securing the right facilitator for your district's planning needs.

- 1. Gather current documents and materials.** Your first step is to gather, organize, and digitalize (so your documents can be easily shared) any current or past plans and other relevant information. If you have never had a strategic plan before, compile whatever information you may have on priorities, programs, and prior operational or work plans. The more information you have for your facilitator the better they can understand the scope of your work and planning needs.
- 2. Obtain 100% supervisor commitment to the planning process.** Moving forward without full board commitment to the planning process will impact the outcome. *Secure answers to the following questions:*

How much time is the board willing to commit to the planning process? Can board members commit to a full day? Can the board dedicate a full day to having important discussions about the direction of the CD?

When is your board able to hold a planning session? Is a weekday or weekend better?
- 3. Identify your Planning Priorities:** Ask your board to name the key issues and areas of focus for the CD. Examples might include regulatory compliance, programming, fund development, supervisor training, staffing and human resources, partner and community engagement, and internal and external communications. This will help your facilitator design an appropriate planning process and propose a realistic scope of work and cost estimate.
- 4. Get a sense of the depth and breadth of your planning process.** Before contacting a facilitator, your board should discuss what kind of input they want to inform planning discussions and decisions. Do they want feedback only from staff and current supervisors, or a wider range of perspectives from former supervisors,



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landowners, partners, funders, and other stakeholders? The scope of input will affect planning costs: the more complex your feedback needs, the more time will be required from the facilitator thereby increasing fees.

- 5. Decide who will be responsible for engaging and managing the consultant.** Give authority (and accountability) to a specific individual within the district to oversee and lead the work with the facilitator. This could be an individual supervisor, the district administrator, or a small work group.
- 6. Do your homework and research possible facilitators.** Consider both conservation knowledge and facilitation skills when looking for a strategic planning facilitator. Look for a planner who understands conservation districts, Montana's natural resource issues, and local partners, and one who is experienced in leading strategic planning processes for public agencies or nonprofits.

Your goal is to understand the consultants' experience and to determine if they will be a good fit for your CD.

- 7. Procure a facilitator.** In procuring a strategic planning facilitator, contact a minimum of two facilitators. Request that proposals include a detailed scope, schedule, and budget. Follow local/public procurement rules, and use a simple, competitive selection process.
- 8. Approve the proposal and write a contract.** Once the board has voted to award the contract, negotiate a simple professional services agreement that spells out the scope, schedule, deliverables, fees, and payment terms.
- 9. Set a date and expectations.** After you've got a date on the calendar, set expectations for board and staff participation, homework between meetings, and how decisions will be made during the process.

The culmination of these efforts should be a written strategic plan and the next steps to shift into annual planning and implementation. The goal is to turn a one-time planning event into an ongoing management tool to guide priorities, drive accountability, and regularly assess progress against your long-term goals.

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