

Strategic Planning Consultant.....do you need one, and what should you look for?

Consultants who work with nonprofit organizations do so in myriad ways – facilitating the strategic planning process, providing board training, researching and preparing grants, coaching new board presidents or new CEO's – just to name a few. Consultants can be content experts or an extra pair of hands. In the voluntary sector they are usually experienced professionals who have a wealth of skills developed during their tenure at various nonprofit organizations. They like working for the greater good, but want to do so from a different perspective--- that of independent businessperson.

This practical paper focuses on how to use a consultant when your organization decides to engage in the strategic planning process.....

- 1.) **Be sure you are clear about what your organization wants/needs from the consultant.** If your organization is interested in engaging in strategic planning but you lack the expertise on board and staff, there are a number of ways a consultant can provide assistance:

- ✍ *A consultant can provide staff and board training on strategic planning* OR
- ✍ *A consultant can provide staff and board training and assist in designing the process for your organization* OR
- ✍ *A consultant can providing training, assist in designing the process and provide coaching from the sidelines* OR
- ✍ *A consultant can facilitating the entire process, preparing all work papers and drafting the initial and final report.*

Depending on your organizational culture, your staff and board's receptivity to new concepts and your pocketbook, you can contract for as much, or as little, as you choose. I have found that most organizations want someone to facilitate the entire process, at least the first time around. On one occasion I was called in after an organization launched the process and found they were stuck somewhere in the middle. The staff and volunteers lacked the time to keep the planning focused and complete the behind-the-scenes work of summarizing data and preparing work documents.

- 2.) **Don't underestimate the chemistry that you feel or don't feel with the consultant.**

Most resources on consulting suggest you interview more than one consultant. This helps you to get a feel for their style, listening and people skills, and how quickly they are able to assess and comprehend your organization and your needs. Strategic planning can be an intense experience, so if you are hiring a consultant to facilitate the entire process carefully consider the fit between the facilitator and the planning group. Trust your instincts on this one. Regardless of a consultant's references, if he or she doesn't feel right, keep looking.

- 3.) **What is the value added that a consultant can bring to your strategic planning process?**

An experienced facilitator/consultant will keep the planning on track by bringing expertise and discipline to the process and offering a neutral/objective point of view about issues which may divide a group. They can also contribute expertise in group process, strategic analysis, and questionnaire design. Having been through the process many times with different groups they are aware of places where groups have a tendency to stall and can suggest appropriate actions.

There are a number of other factors to consider when working with a consultant and they will be explored in future issues of Pat's Practical Papers.

If you want to read more about selecting and working with a consultant go to the Nonprofit Genie @ www.genie.org/index.html and click on Consultants

BONUS - The Nonprofit Genie site has a very, very comprehensive directory of non-profit links

If you would like to talk to Pat about having her work with your organization on strategic planning call or e-mail today.