



Checklist for Hiring a Strategic Planning Facilitator

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A strategic plan significantly increases your organization's chance of success. An experienced facilitator is an investment in your organization's future and its ability to further its mission. Consider these five qualities when choosing a facilitator for your strategic plan BEFORE you consider their fee.

1. Relevant experience

Why it's important: A facilitator with significant nonprofit leadership experience will understand the nuances of running a nonprofit.

How to evaluate:

- Ask about their nonprofit experience, particularly in a leadership role
- Request references from past clients

2. Effective communication skills

Why it's important: Effective communication is crucial for managing group dynamics, ensuring all voices are heard, and articulating complex ideas clearly.

How to evaluate:

- Observe their communication style during initial meetings
- Ask how they handle conflict or disagreement during sessions
- Inquire about their methods for engaging quieter participants and how they handle challenging personalities

3. Process expertise

Why it's important: A well-structured process ensures that all important aspects of strategic planning are covered, and that time is used efficiently.

How to evaluate:

- Ask them to outline their typical strategic planning process
- Ask if they use an *evidence-based* method in their process

4. Results-oriented

Why it's important: The end goal of strategic planning is to create *actionable* plans that drive organizational success, not just to produce a document.

How to evaluate:

- Ask how they ensure plans are implementable, not just aspirational
- Inquire about their methods for setting measurable goals and objectives

5. Other Services

Why it's important: Strategic planning often uncovers areas where an organization may need extra help. Things like board development, fundraising planning, and executive coaching are the most frequent I see in my practice. Using a consultant for these services that has already helped you with strategic planning can save you valuable time because they're already familiar with the organization and have (hopefully) gained your trust.

If you would like more information about me and my process, schedule a 15-Minute Discovery Call. <https://calendly.com/lauragamble/15-minute-discovery-call>