

# CONSERVATION DISTRICTS BUREAU

## 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 makes sure everyone is heard.

When hiring a strategic planning facilitator, make sure they are well-versed and experienced in helping agencies, organizations, and nonprofits craft strategic plans; this is an investment in your CD's future and will repay many times over. The following are some tips to help you navigate the process of securing the right consultant 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 or other relevant information. If you have never had a strategic plan before, compile whatever information you may have on priorities, programs, operational or work plans, and your Conservation District Bureau (CDB) 2023 assessment. The more information you have for your consultant the better they can understand the scope of your work and planning needs.
2. **Obtain 100% supervisor commitment to the planning process.** No doubt this is a crucial step, moving forward without ALL your board committing to devote time and effort into the planning process will lead to less than satisfactory results. Secure answers to the following two questions:
  - *Time commitment.* How much time is your board willing to commit to the planning process. Can they dedicate a full day to having important discussions?
  - *When.* When would your board like to hold a planning session? What month and on a weekday or weekend.
3. **Identify your Planning Priorities:** What does your board identify as key issues or areas for planning; some common conservation district priorities include regulation compliance, programming, fund-development, supervisor training, staffing and human resource management, partner and community engagement, and internal and external communications. This information will help your consultant determine the best planning process, a realistic scope of work, and fee structure for your CD.
4. **Get a sense of the depth and breadth of your planning process.** Before your reach out to a consultant your board should have a conversation about what typed of input they would like to collect to guide their planning discussions and decisions. Just staff and the current board or broader to former supervisors, landowners, partners, funders, and other stakeholders. This step will have an impact on the cost of your planning. The more complex your feedback needs; the more consultant time will be involved and the higher the fee.
5. **Decide who will be responsible for engaging and managing the consultant.** Give authority (and accountability) to a specific individual to be in charge of managing and leading the work with the consultant. Will this individual be a supervisor, your administrator, or a small work group?

6. **Get to know possible consultants before you reach out.** The CDB has provided you with a list of individuals who facilitate strategic planning throughout Montana (this list is not a comprehensive, so you may have others you know and want to use). All of the consultant on the list have a basic idea of what conservation districts are and that planning is needed. Some individuals have had experience working with conservation districts and/or government agencies. Spend some time on the websites of your top choices to get an understanding of their work, priorities, and who they are.
7. **Reach out to via email.** Contact your top one or two consultants via email and check on their availability (this will save you a lot of time chasing after a consultant that is already fully booked for the time frame your board outlined in Tip #2). The three main items to include in your correspondence are:
  - Where you got their contact information (if you got it the CDB Strategic Planning List, let them know that).
  - Some general info about your district, your location, annual budget, staff size, if you have had a plan before, and your preferred timeframe for planning.
  - A request (if they are available during your timeframe) to set up a virtual meeting to your needs and their approach in more detail.
8. **What to talk about?** Your goal is to understand the consultant's methods and if they will be a good fit for your CD.
  - Start by asking the consultant about their services and if they have ever worked for conservation districts before (it shouldn't rule them out if they haven't).
  - Provide a little background about your district, its planning priorities, and other pertinent information. This should be a BRIEF give-and-take exchange to help the consultant understand the work and dynamics in your district.
  - Ask them to describe their steps in the planning process and how they might customize their process to fit your districts size, programs, and operations.
9. **Some specific questions you might ask include:**
  - How do you suggest we go about collecting stakeholder feedback?
  - What kind of report will we get on stakeholder feedback for our consideration and records?
  - What is your deliverable, will we receive a draft strategic plan or just retreat notes?
  - Will you work with us after the planning session to finalize the plan?
  - Does your planning process include helping us to take our strategic plan into an operational annual work plan?
  - What is your fee-range estimate for this process? This question is important in that it will not tie the consultant down to a specific number before they have had time to consider all needs and associated time, but it will give you range of how much money to request in your CDB grant.
  - Be sure to specify if their fee/estimate includes travel time, mileage, lodging, and meals; or, will those be added expenses?
10. **Ask for a proposal.** Request that the consultant send you a simple proposal for consideration. The proposal should include, at least, the following:
  - Details of the scope of work.
  - The planning process or timeline.
  - Deliverable specifics or what documents your district will receive during and after the process.
  - Planning fees and estimates of additional costs.

- Language outlining the work relationship between your district and the consultant. If the consultant is an independent contractor, they should be able to provide you with either a MT Independent Contractors Certificate or proof of workers' comp coverage.
- Indemnification wording.
- A statement of confidentiality on their part.

11. **Approve the proposal and get your planning date on everyone's calendar.** Your district probably needs to move fairly swiftly to secure a space on a consultant's calendar, so once you receive the proposal(s) forward it (them) to your board for quick review and approval. Keep the consultant apprised along the way, especially if they are holding a date for your planning session.