

Subject **[DM Listserv] Strategic Plan Consultants**  
From Lucas Patzek <DM\_Listserv@carcd.memberclicks.net>  
Sender <carcd@memberclicks-mail.net>  
To <smoreno@gcrd.org>  
Reply-To <DM\_Listserv@carcd.memberclicks.net>  
Date 2023-07-28 10:00 AM



Hi Nancy,

We've worked with Amy Stork now on two strategic plans and can definitely recommend her. That said, there are also some great local/regional consultants out there that I've worked with at previous jobs, including Ag Innovations, Consensus Building Institute, etc.

A strategic planning process can vary widely in complexity, depth, and in-person versus virtual approaches, all of which impact cost. My recommendation is that you set a number you're comfortable with, and then share that with a couple of consultants to ask what kind of process can be designed with that budget figure in mind. During that process you will have conversations with them about objectives and design considerations.

For instance, here are the objectives that we are designing our current strategic planning process around:

- Increase full-group shared understanding of the RCD's current situation, key concerns, and strategic options.
- Provide multiple opportunities for input from all staff and directors, including through meaningful engagement of the program committees.
- Ensure the plan includes meaningful benchmarks, methods for measuring progress towards those benchmarks, and structures for reporting/discussion that will keep the board and staff involved and help ensure programs stay on track towards key objectives.
- Coordinate with JEDI assessment and early JEDI action planning supported by a JEDI consultant

All the best!

Lucas

Lucas Patzek, Ph.D.  
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**From:** carcd@memberclicks-mail.net <carcd@memberclicks-mail.net> **On Behalf Of** Nancy Gooch  
**Sent:** Friday, July 28, 2023 9:48 AM  
**To:** Lucas Patzek <lucas@naparcd.org>  
**Subject:** [DM Listserv] Strategic Plan Consultants

Thanks, Brittany. I will certainly list that as one of the options.  
Nancy

On Thu, Jul 27, 2023 at 3:21 PM Brittany Jensen <[DM\\_Listserv@carcd.memberclicks.net](mailto:DM_Listserv@carcd.memberclicks.net)> wrote:

Hi Nancy,

We haven't had good luck with strategic plan consultants. We did have success however with a trade deal where me and an ED from another RCD traded facilitating one another's strategic plan. I am happy to discuss in detail how that went. At the time we couldn't afford a consultant and had enough good rapport in our RCD to have that be enough. If that doesn't sound right for you I've heard others recommend [Amy Stork](#).

Good luck,

**Brittany Jensen** | *(She, Her, Hers)*  
*Executive Director*  
**Gold Ridge RCD**

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**From:** [carcd@memberclicks-mail.net](mailto:carcd@memberclicks-mail.net) <[carcd@memberclicks-mail.net](mailto:carcd@memberclicks-mail.net)> **On Behalf Of** Nancy Gooch  
**Sent:** Thursday, July 27, 2023 10:54 AM  
**To:** Brittany Jensen <[Brittany@goldridgercd.org](mailto:Brittany@goldridgercd.org)>  
**Subject:** [DM Listserv] Strategic Plan Consultants

Thanks you to those who responded to my previous post on the admin message board. Nancy suggested I try here as well.

EKCRCD is thinking of hiring a consultant to create a strategic plan for us, and we would like to get recommendations on able consultants and their ballpark costs. If you have contracted for a strategic plan and are happy with the results, EKCRCD would like to hear from you. Our board decided that our strategic plan needs to address: • directions for growth and sustainability as an agency; • the current lack of participation from the communities we serve, including low meeting attendance by the public and difficulty in finding directors; • our RCD's long range plans and goals; • relevant grant/funding opportunities. The strategic plan should facilitate grant application for relevant grants. Thanks Nancy Gooch, Admin. Asst.

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Please contact me by email as I am hearing impaired.

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