GUIDE / STRATEGY

# How to Choose the Right Strategic Planning Partner

Identify your planning needs, compare potential partners, and ask questions about participation, values, and working style.

Before speaking with consultants, agree on what you need, what matters in the process, and what your team can contribute.

## 1 The work we need to address

What main challenges or goals should a planning partner help address?

## 2 Values and working practices

Which values and working practices must a partner share, such as equity, community familiarity, language or cultural competence, and collaboration?

## 3 Resources we can commit

What budget, timeline, and staff time can you dedicate to the partnership?

© 2026 Equilibria Strategies, LLC. All rights reserved.

GUIDE / STRATEGY

# How to Choose the Right Strategic Planning Partner

## Conversations with potential partners

1. How do you approach strategic planning, and how do you ensure the process is inclusive and participatory?

2. Can you give an example of work with an organization like ours, especially one that is BIPOC-led or grassroots?

3. What will our team's involvement look like?

4. How will you incorporate our values and community voices into the plan?

## Warning signs to take seriously

- Promises quick fixes before listening to your context.
- Talks down to the team or dismisses its knowledge.
- Cannot explain how their practice reflects your equity commitments.
- Shows little interest in your organization's particular needs and working conditions.

What do we need to clarify before choosing a partner?

© 2026 Equilibria Strategies, LLC. All rights reserved.