

Where to begin: Planning a Strategic Planning Process

Who:

Organization: _____

When:

Plan Period: 1 yr 3 yrs 5 yrs other _____

Planning Process Start Date: _____ Process Completion Date: _____

Desired Outcomes

1. Besides the plan, what other desired outcomes would you like from the process?

Resources Needs

2. What planning resources needed and what are projected costs?

(staff, administrative assistant, travel costs, consultant, site rental fee, research/data)

Information Needs

3. What information is needed to guide our planning?

(highlight the most important information needed to guide your future planning)

Planning History

4. What previous plans exist (strategic, program, fundraising, marketing, visioning), from when (dates), and how might they be used in this process?

Team: Planning Participants

<p style="text-align: center;"><i>Players:</i></p> <p style="text-align: center;">Who Should be Involved in the Planning Process? (List by individual name or function)</p>	<p style="text-align: center;"><i>Position:</i></p> <p style="text-align: center;">Participant's Organizational Title (Staff, Board, Volunteer, Contractor)</p>	<p style="text-align: center;"><i>Role:</i></p> <p style="text-align: center;">Strategic Planning Process Role (How can we involve them and what would be their role?)</p>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
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11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		

Groups: Planning Team and Workgroups

Committees & Workgroups for the Planning Process	Purpose & Products (research, develop budget, conduct interviews, etc.)	Staff or Board Lead
1.		
2.		
3.		
4.		
5.		

When: Planning Timeline

<i>Start:</i> Plan Process Start and Completion Date: _____							
<i>What:</i> Activity or Benchmark	<i>Who:</i> Person(s) Responsible	<i>When:</i> Time Periods					