

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

## *Groups:* Planning Team and Workgroups

<b>Committees &amp; Workgroups for the Planning Process</b>	<b>Purpose &amp; Products</b> (research, develop budget, conduct interviews, etc.)	<b>Staff or Board Lead</b>
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					