

Plan the Planning Effort Worksheet

Instructions: Indicate how each of the following issues will be handled, then outline the steps, responsibilities, and timelines for developing your strategic plan.

1. You are developing a strategic plan for:

- Your total organization
- Only part of your organization (division, program)
- Total organization and each major program or division
- Other _____

2. For what period of time are you planning?

- Next 2 years
- Next 3 years
- Next 4 years
- Next 5 years
- Other (specify) _____

3. What critical issues do you hope the planning will address?

4. Time devoted to planning: which approach do you prefer?

- "What we can do in a limited time" approach: under 8 hours of planning meetings
- A compact approach: 10-20 hours of planning meetings
- A more extended approach: 24-40 hours of planning meetings
- Over 40 hours of planning meetings

5. Are you going to use a consultant or other resource persons in developing the plan?

- Yes

If so, what kind of help do you want them to provide?

6. Will you use a planning team?

- Yes No Unsure

If so, who will be on it? (check as many as apply)

- Board members Executive director
 Other staff Consultant

Others: people in your field, clients or users, funders, etc.

What size team might work best (5-8 people is common)? _____

7. Are there other stakeholders you want input from in the development of the plan?

In the review of the plan?

8. Who within your organization will manage the overall planning effort?

9. Who will lead or chair the actual planning meetings?

10. By what date do you want to have the plan approved? _____

11. Outline the steps you will use in developing your plan. After the process review it with the people involved, then make any changes needed.

Steps	Responsible	By when
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