

Strategic Planning Process Design Worksheet

Your answers to the following questions will begin to help you design your next successful strategic planning process.

- 1) What is the timeframe for completing the strategic planning process? What is important about this time frame? During this timeframe are there any special organization events to work around?
- 2) How do you want to involve Board members and staff in the planning process? What level of engagement separately and together is important? What will be the Board meeting schedule during the planning period? What is the existing regular staff meeting and/or senior team meeting schedule?
- 3) What roles do you want to assign to a strategic planning committee in this process?
 - a. Charge with doing the strategic thinking and developing the plan to recommend to the Board
 - b. Charge with guiding the planning process that involves the rest of the board and staff in various ways
 - c. Other
- 4) How clearly has the organization articulated its organization identity including mission statement, vision statement (at least 10 years out), and core operating values, guiding principles/theory of action, core competencies, and primary and supporting target audiences? How important is it in this strategic planning process to affirm or refresh and affirm these some or all of these organization identity elements?
- 5) What strategic questions or issues are critical to explore in the development of this strategic plan?
- 6) What clients, partners or other key stakeholders is it important to hear from to inform your strategic thinking? What information do you want to learn from these audiences?
- 7) Who do you want to assign responsibility for drafting the strategic plan? How will Board members and staff be invited to participate in the writing and/or giving plan input?
- 8) Once the strategic plan is approved, what kind of support will you need to develop an implementation action plan or business plan that includes strategies, action steps, budget requirements, and a framework for accountability? Do you have or need tools for monitoring and tracking strategic plan progress?