

Sample Timeline/Workplan for Strategic Planning

This timeline is provided as a basis for discussion and development of the planning process, and should be modified and customized to meet your organization's needs.

Task	Mo. 1		Mo. 2		Mo. 3		Mo. 4		Mo. 5		Mo. 6
Develop Planning Timeline and Approach											
• Consultant review of written organizational records	■										
• Discuss alternate approaches and plan formats with Planning Committee; determine desired process and format of end product		■									
• Write brief summary of organizational history and accomplishments, current situation		■									
• Identify information needed for strategic planning		■									
• Facilitate discussion to develop list of stakeholders		■									
• Develop a plan for soliciting stakeholder input		■									
• Committee brings proposal to Board for approval			■								
Review/Validate Mission and Vision											
• Approval of proposed planning process			■								
• Initial discussion of mission			■	■							
• Develop org. values, if desired			■	■							
• Stakeholder input to mission/5 year vision				■	■						
• Wordsmithing of mission as needed					■	■					
• Approval of revised mission statement & 5 yr vision							■				
Gather relevant data and stakeholder input											
Sample strategies listed below. Decision about data gathering needs and priorities should be made during development of timeline and approach.					■						
• Hold constituent/stakeholder focus groups					■						
• Membership and/or client survey					■	■					
• Interview key partners/funders					■	■					
• Prepare relevant financial information					■	■					
• Research other models/peer organizations					■	■					
• Competitive scan/environmental scan					■	■					
• Review bylaws and current organizational systems, identify gaps					■	■					
Set goals/develop plan framework (usually accomplished in the context of a board retreat)											
• Review data							■	■			
• Brainstorm goals and objectives							■	■			
• Cluster/prioritize goals to identify 3-5 broad goal areas							■	■			
• Set broad goals in support of mission							■	■			
• Draft objectives							■	■			