



SPiN: Strategic Planning in Nonprofits

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											





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• 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											
Write the strategic plan											
• Identify leads for each portion of the plan											
• Provide template for plan											
• Provide coaching and facilitate small group discussions to support development of plan narrative											
• Provide training and assistance to develop measurable outcomes											
• Compile/edit draft strategic plan											
Review Draft Plan											
• Review, feasibility testing, additional prioritization if necessary, clarify roles and responsibilities (how will the plan get done?)											
• Financial projections/analysis if desired											
• Check for clear outcomes/ensure that progress can be shown/evaluated and develop strategy for ongoing board monitoring of progress											
• Validate plan with membership, if desired											
Approval of final strategic plan											