

STRATEGIC PLANNING:

OVERSIGHT, DEVELOPMENT, AND IMPLEMENTATION

OPTION 1: Baseline Shoestring - 1-2 Months

- Create timeline and framework for Strategic Planning.
- Facilitate work group meetings before and after the retreat.
- Provide project management, including reminders about deadlines.
- Provide templates for all necessary tools for strategic planning (and modify the templates with group feedback).
- Provide advice and research on sector-accepted best practices.
- Facilitate small work group to conduct an environmental scan and analyze results.
- Analyze metrics of board performance related to overall board governance.
- Provide template for environmental scan presentation to the board.
- Facilitate a 3-4 hour board retreat.
- Provide template for final strategic plan document.
- Provide feedback on final document to the board.
- Produce a written report summarizing engagement deliverables, with suggestions for additional opportunities to strengthen the organization.

OPTION 2: Baseline Advance - 3-4 Months

- Includes everything listed in Option 1, and:
- Interview board members as part of the environmental scan and board analysis (instead of the work group).
- Draft the initial report on environmental scan, recommendations, and priorities in preparation for the Board retreat (instead of the work group).
- Draft a revenue plan to support strategic plan implementation (instead of the work group).

OPTION 3: Comprehensive Strategic Planning Process - 5-6 Months

- Everything in options 1 & 2, and:
- Review relevant organizational documents.
- Conduct initial planning meeting with selected staff and board members.
- Collect data needed for the planning process.
- Facilitate multiple strategic planning meetings with senior staff and board (two, half-day planning retreats and additional planning meetings as needed).
- Develop a strategic plan (contents finalized based on planning approach selected by client).
- Present strategic plan to board.