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| **PLANNING TO PLAN** | |
| OBJECTIVES | |
| **Why do we need or want a plan?** |  |
| **What questions do we need to answer through our process?** |  |
| **Based on our identified needs—along with the way our organization works—what do we want our end product to be?** |  |
| TIMING | |
| **Are we ready to achieve our objectives for a planning process?**  **If no, what do we need to do to get ready? How long will this take us?** |  |

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| **PLANNING TO PLAN** | | |
| SKILL | | |
| **Have you (the person(s) responsible for planning) ever developed a strategic plan?** | | |
| **Yes** | | **No** |
| How did you use that plan? | | Who can you learn from? |
| What did you learn? | | Where can you get information? |
| What will you repeat? | | Who can offer your resources, assistance, or counsel? |
| What will you do differently? | |  |
| **PLANNING TO PLAN** | | |
| ORGANIZATIONAL WILL | | |
| **Who, within our organization, is interested in planning?** |  | |
| **Who has expertise in the following areas that you think you might need?**   * Project manager * Facilitators, consensus builders * Note takers * Writers * Editors * “Time keepers” * Vision keepers * Connectors * Researchers |  | |
| **Who is wary? How will you address skepticism and build momentum?** |  | |

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| **PLANNING TO PLAN** | |
| TIME | |
| **How much time can we invest?** |  |
| STAKEHOLDERS | |
| **Who do we need to hear from in order to meet our objectives?** | Staff & Board:  Consumers:  Funders/Partners:  Broader Community: |
| **Who do we need a closer relationship with?** | Staff & Board:  Consumers:  Funders/Partners:  Broader Community: |
| **Who needs to care more about our organization?** | Staff & Board:  Consumers:  Funders/Partners:  Broader Community: |
| **PLANNING TO PLAN** | |
| RESOURCES | |
| **What resources do we need?** |  |
| **What resources do we have?** |  |
| **Who will lead the process?** |  |
| **Who will facilitate the process?** |  |
| **Role** | **Name of Staff/Board/Volunteer/Contractor** |
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