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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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