SAMPLE: Strategic Planning Process & Timeline

Jan/Feb 2021

Step 1: INFORMATION GATHERING

(a) Consultant meets with designated reps from Org. to determine full scope.
(b) Consultant reviews current documents, communication tools, etc.
(c) Consultant conducts environmental scan and interviews.
(d) If organization desires, Consultant creates and administers a survey, compiles results into a presentation format.
(e) Board members answer short questionnaire created by Consultant (separate from Survey questions).

March 2021

Step 2: STRATEGIC PLANNING FACE to FACE WORKSHOP

(a) Consultant plans and develops facilitation tools/materials for workshop.
(b) Consultant facilitates workshop (presents survey results).
(c) Consultant provides workshop materials/supplies/equipment.
(d) All Board members attend workshop and will invite Guests (if applicable).
(e) Organization provides venue/lunch/refreshments (with current COVID-19 Guidelines in effect) (may require zoom for some participants)

Early April 2021

Step 3: DRAFT PLAN WRITTEN BY CONSULTANT & REVIEWED BY BOARD

(a) Consultant writes draft strategic plan (if desired, can be co-written with Bd).
(b) Consultant presents draft to Board to ensure accuracy.
(c) Board provides written input within deadline provided.

Late April 2021

Step 4: FINAL DRAFT PLAN AVAILABLE TO MEMBERSHIP FOR COMMENT

(a) Final Draft Plan made available to members with feedback timeline.
(b) Feedback incorporated into plan where applicable/appropriate (determined by the Board).

May 2021

Step 5: FINAL PLAN APPROVED BY BOARD & OUT TO MEMBERS

(a) Consultant completes final plan, including visuals, + Monitoring Document
(b) Plan approved by motion by the Board (date indicated on final plan)
(c) Post on social media; Present at AGM
(d) Copies available for members/funders, etc.

STANDING COMMITTEE APPOINTED BY
BOARD OF DIRECTORS
TO MONITOR IMPLEMENTATION OF STRATEGIC PLAN