

Planning to Plan: Scoping Checklist

You know you need a strategic plan, but where do you start? Having the answers to some key questions will help determine the process you need, and will speed up your initial conversation with a consultant, should you choose to hire one.

The Deliverable

What “itch” is this scratching? What do you want to learn, experience, and/or generate through this planning process?	
Is there a clear scope for the plan? What’s up for discussion and what is out of scope?	
Who will be the intended audience(s) for the final product?	
How polished does the final product need to be? (e.g. Internal production vs. professional graphic design? What formats?)	
How much implementation detail will be addressed collectively during the planning process vs. sticking with big picture and handling details internally later?	

The Stakeholders

Who will make decisions about the final plan?	
Specifically, who needs to be involved and why?	
What information do those people have or need?	
In what formats or contexts would it be best to access them?	



Planning to Plan: Scoping Checklist (continued)

Internal Capacity

Do you need to work with a consultant? Will they be involved in everything or just some aspects of the project? (e.g. facilitation, not note taking; project design, not meeting logistics)	
Are your key people strategic thinkers?	
How unified are they?	
How available are your key people likely to be during this planning process? (e.g. Board members, Executive Director, Planning Committee)	

Resources

How much money do you have available for this project? Is the amount flexible?	
Is there a specific deadline to work towards? How firm is it?	

