

Worksheet 1

Identify Planning Process Issues and Outcomes

- What would success look like at the completion of the planning process? What does your organization wish to achieve from a planning process?
- What issues or choices do you think need to be addressed during the planning process?
- Are there any non-negotiables that need to be articulated upfront? Any constraints regarding the planning process?

What would success look like at the completion of the planning process? What do you wish to achieve from a planning process?

Many of the strategic issues discussed during a strategic planning process address some or all of following four questions:

1. *Mission*. How well are we achieving our mission and how could we have a greater impact?
2. *Financial*. Are our operations financially viable, and how can we ensure the long-term financial stability of our organization? Do we have effective financial management systems in place to monitor our finances?
3. *Administrative capacity*. Do we have the administrative capacity to effectively and efficiently support our programs and services? What would it take to maximize our organizational capabilities in terms of planning, human resources and leadership, organization culture and communication, and our technology and facilities infrastructure?
4. *Governance*. How effective is the board at protecting the public's interest,—ensuring that charitable dollars are used effectively and efficiently and that the organization is fulfilling its mission? What can we do to ensure that our board is able to fulfill its governance role now and for the future?

What specific strategic questions or choices does your organization need to address during the planning process? (Note: not every strategic issue will have a short-term focus question).

Strategic (longer-term) issues to be addressed—framed as a question:	Short-term focus? Are there some operational questions that need to be addressed in the near future? If yes, list below:

(Use other side for additional issues.)

Are there any issues that are non-negotiable (not open for discussion)? Any constraints regarding the planning process?

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