



Strategic Planning at a Glance

Start here to get radical clarity on the things that matter most



Scope the Work

Clarify the critical questions or decisions that will guide your planning process

- Why are we embarking on a strategic planning process, and what do we want to get out of it?
- What are the most important decisions facing our organization? Where should we focus our time and energy in the planning process?



Engage Stakeholders

Identify who to involve in the planning process and how to engage them

- Who will we need to help develop and implement our strategic plan? How and when will we engage them?
- Do these individuals or groups reflect the perspectives of those most proximate to the work?



Clarify Strategy

Make choices about the impact you want to have, how, and for whom



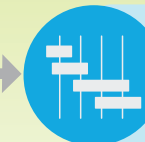
Set Strategic Priorities

Translate your impact goals into clearly articulated priorities



Estimate Resources

Figure out the time, money, and skills it will take to carry out your priorities



Plan to Implement

Determine how to manage and monitor progress and adapt as needed

What is the problem we seek to address in the world?

- Are some populations disproportionately impacted?

What impact goals will we hold ourselves accountable to over the next 3-5 years?

- Who is our population of focus?
- Where will we do our work?

How does our portfolio of work lead to the impact we aspire to achieve?

- What external trends could affect our work?

How well are we performing against our impact goals today?

- Across our portfolio of work, among different populations, and compared to other actors?

What will we need to do differently to accomplish our impact goals in the future?

- What programs may we need to grow, evolve, or sunset?
- What new programs may we need to pursue?
- How do we—or how could we—advance equity in our portfolio of work and program design?

What resources—financial, human, organizational—will we need to pursue our strategic priorities?

- Where will we need to add, reduce, or diversify talent?
- What new systems or capabilities will we need to build or buy?
- What level and what type of funding will be required?

Do we have the right organizational design in place to pursue our strategic priorities?

What metrics and milestones will we track to ensure progress and accountability?

- How might we disaggregate data to assess the equity implications of our work?

What are the biggest risks or outstanding open questions?

- How will we proactively mitigate these risks?
- How will we experiment, learn, and adapt over time?

How will we use our strategic plan to continually inform decision making?