



SPiN: Strategic Planning in

This timeline is provided as a basis for discussion and development of the planning process, and should be modified and customized to meet our organization needs.

Task	Mo. 1		Mo. 2		Mo. 3		Mo. 4
Develop Planning Timeline and Approach							
• Review of written organizational records							
2018 Interviews of Faculty/Staff by Dini Spheris (p. 3-20)							
2018 Interviews of Donors by Dini Spheris (p. 21-40)							
2018 Dini Spheris Report 11.28.18 (p. 41-98)							
2019 Case for Support (p. 99-111)							
Five Years of Balance Sheets (p. 112-113)							
Campaign Progress Sheet (114)							
• Discuss alternate approaches and plan formats with Planning Committee; determine desired process and format of end product							
Strategic Plan Outline (p. 115-116)							
Goals/Tactics to Institutional Priorities (scorecard grid) (p. 117-119)							
• Write brief summary of organizational history and accomplishments, current situation							
What we have, what the college has (120-121) Align our history with important contributions by year that helped the College accomplish the College history?							
• Identify information needed for strategic planning							
• Facilitate discussion to develop list of stakeholders							
• Develop a plan for soliciting stakeholder input							
Consider, we have the 2018 Dini Spheris Interviews and the College is performing a strategic planning (see SWOT) information (p. -)							
• Committee brings proposal to Board for approval							
Review/Validate Mission and Vision							
• Approval of proposed planning process							
• Initial discussion of mission							
• Develop org. values, if desired							

• Stakeholder input to mission/5 year vision							
• Wordsmithing of mission as needed							
• Approval of revised mission statement & 5 yr vision							

Gather relevant data and stakeholder input Sample strategies listed below. Decision about data gathering needs made during development of timeline and approach.

• Hold constituent/stakeholder focus groups							
• Membership and/or client survey							
• Interview key partners/funders							
• Prepare relevant financial information							
• Research other models/peer organizations							
Task	Mo. 1		Mo. 2		Mo. 3		Mo. 4
• Competitive scan/environmental scan							
• Review bylaws and current organizational systems, identify gaps							

Set goals/develop plan framework (usually accomplished in the context of a board retreat)

• Review data							
• Brainstorm goals and objectives							
• Cluster/prioritize goals to identify 3-5 broad goal areas							
• Set broad goals in support of mission							
• Draft objectives							

Write the strategic plan

• Identify leads for each portion of the plan							
• Provide template for plan							
• Provide coaching and facilitate small group discussions to support development of plan narrative							
• Provide training and assistance to develop measurable outcomes							
• Compile/edit draft strategic plan							

Review Draft Plan

• Review, feasibility testing, additional prioritization if necessary, clarify roles and responsibilities (how will the plan get done?)							
• Financial projections/analysis if desired							
• Check for clear outcomes/ensure that progress can be shown/evaluated and develop strategy for ongoing board monitoring of progress							
• Validate plan with membership, if desired							

Approval of final strategic plan							
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Nonprofits

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