Scope the Work

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

Set Strategic Priorities

- Translate your impact goals into clearly articulated priorities
- 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?

Estimate Resources

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

Plan to Implement

- Determine how to manage and monitor progress and adapt as needed
- 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?