Planning for Social Change:  
Customizing Strategic Planning to Fit Your Agency  
Carolyn Sullivan, New Chapter Coaching

Module One: Readiness Assessment

1. Strategic planning is defined as:

________________________________________________________________________

2. A thorough pre-planning readiness assessment will ask the following questions:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. It is not a good time to engage in strategic planning when:

1. ____________________________  2. ____________________________

3. ____________________________  4. ____________________________

4. It is not uncommon for an agency to need any of the following pre-planning capacity-building activities:

1. ____________________________  2. ____________________________

3. ____________________________

Module Two: Designing the Process

5. What are some of the 12 best practices that are most important to an effective planning process:

1. ____________________________  2. ____________________________

3. ____________________________  4. ____________________________

5. ____________________________  6. ____________________________

7. ____________________________  8. ____________________________

6. While you have much freedom when it comes to the form and content of your strategic plan, you are mandated to include the following in it:

1. ____________________________
To customize your planning process, you will need to decide which kinds of data and information to collect and analyze, including some or all of the following:

1. _____________________________
2. _____________________________
3. _____________________________
4. _____________________________
5. _____________________________
6. _____________________________
7. _____________________________
8. _____________________________
9. _____________________________
10. _____________________________

The most common term for a nonprofit strategic plan is currently _____ years.

The most common strategic planning process takes ____ months and includes ___ mos. for pre-retreat planning and ____ mos. for staff to building out the plan.

Module Three: Implementing the Planning Process

Attributes of a good retreat location include:

1. _____________________________
2. _____________________________
3. _____________________________
4. _____________________________
5. _____________________________
6. _____________________________
7. _____________________________
8. _____________________________

Putting Your Learning into Practice

What 1-2 things from today’s training will you share with a board member or coworker?

_________________________________________________________

_________________________________________________________

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