**PROGRAMS + STAKEHOLDERS**

**Core Competency**

**Most**

**pr**

**essing**

**needs**

**Donors + “the sector”**

**Users/ participants**

**Most pressing**

**needs**

**Board/ Staff**

**Our planning process worked because we:**

**Asked for help.** We don’t always need outside perspective, but this time we did.

**1**

**+Engaged funders early and often!** They are people. They want to help.

**2**

**Weren’t too precious.** We killed programs that we loved…

**3**

**Were ambitious...enough.** We set a big, scary, and achievable goal.

**4**

**Didn’t stop at mission/vision.** Operating plans are meant to be broken, but you need something to iterate on.

**5**

**+Created pro forma financials.** We didn’t just end the plan with “now we’re going to raise a billion dollars”

**6**

**Planned holistically.** We didn’t defer facility planning, we incorporated it.

**7**

**Took our time.** We revisited the topics over and over again with time to think in between.

**8**