



Budget sample for Strategic Planning

Total COCo billable hours: 109 hours (preparation and support: 55 hours / facilitation: 54 hours)
Time required from “the organization”: 69.5* hours (preparation: 33 hours / meetings: 27.5 hours + 9 bank hours)
Cost: \$10,925

**69.5 hours represent the total number of hours required from the SP committee. Note that some of this work can be divided among the members of the committee. The only time when we will require for everyone in your organization to be present (staff and board), will be during three meetings (retreats) for a total of 16 hours.*

Activities		Who	Organization Hours	COCo Hours	Cost (\$100/hr)
Diagnose	Identify and invite eager individuals to help form a guiding coalition (ex. Strategic Planning Committee (SPC)) to support the development of the strategic planning process	“The organization”			
	Internally socialize need for change (Ongoing)		1		
	Review key documents shared by “The Organization”	COCo facilitators		2	\$200
	Organizational pulse check survey prepared, sent to staff and board, and reviewed	COCo facilitators		4	\$400
Prepare	Review background documents: current mission and vision statements, organizational chart, previous operational plans (if any), client satisfaction surveys (if used), employee satisfaction/engagement surveys (if	COCo facilitators		2	\$200

	used), funder requirements, program descriptions				
	Virtual meeting with SPC to discuss general findings from internal survey and prepare for environmental scan and research map, confirm methodologies, stakeholders, and questions.	COCco facilitators & “The organization”	2	6	\$600
	Develop and finalize data map for consultation (e.g. establishing research questions, questions for stakeholder groups, and methodology)	COCco facilitators		4	\$400
	1 half-day retreat with staff and board to clarify the big picture (mission, vision, values)	COCco facilitators & “The organization” Board & Staff	4	13	\$1,300
	Environmental scan of external factors: review existing documents and conduct research	“The organization”	8		
	Virtual meeting with SPC to review environmental scan + conduct SWOT, and PEST analysis of external factors, and discuss planning context.	COCco facilitators & “The organization”	1.5	7	\$700
	Prepare and send summary of environmental scan findings – to be read internally prior to strategic planning group meeting	“The organization”	5		
Consult	Develop invitations asking stakeholders to participate in the consultation process	“The organization”	1		
	Data collection: surveys, focus groups, interviews	“The organization” (supported by COCco facilitators)	10	4	\$400
	Collate and analyze information from all data sources	“The organization” (supported by COCco facilitators)	5	4	\$400

	Prepare Stakeholder Consultation Report with the key findings (e.g. themes, outliers) from the consultation to assist in the preparation for all of “The organization”’s staff and board for the upcoming planning sessions (retreats).	“The organization”	3		
Plan	Meeting with SPC to discuss stakeholder consultation report and review retreat logistics and materials Co-Design planning retreats (including preparing agendas, templates, background materials, handouts, etc.)	COCo facilitators & “The organization”	3	7.5	\$750
	Retreat planning x 2	COCo facilitators		10	\$1,000
	Retreat #1 (1 day) – Strategic Planning Guide discussion on stakeholder consultation findings along with findings from the environmental scan (previously addressed) Articulate what will be “The organization”’s strategic priorities Have clarity on what areas “The organization” will focus on and what is the goal and desired impact of each priority	COCo facilitators & “The organization” staff & Board	6	14	\$1,400
	Retreat #2 (1 day) – Operational Planning Develop operational aspects of proposed strategies: key actions, resources, timelines, leader, key performance indicator (KPI) metrics to measure success Articulate next steps for planning and implementation	COCo facilitators x The organization” staff & Board	6	14	\$1,400

	Plan year 1				
	Strategic and Operational Plan writing using draft gathered during the retreats (1-2 page for each)	“The organization” (supported by COCo facilitators)	5	3.5	\$350
Bank of hours	15% of the total hours for planning, admin tasks and additional support		9	14	\$1,425
			69.5	109	\$10,925

If you're ready to get started visit: coco-net.org to fill out our [intake form](#).

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