

## WORKSHEET 1: FORMING YOUR PLANNING TEAM

In a business planning process, the planning team typically includes the CEO and top financial manager (CFO or COO). It may also include other senior staff or program staff with specialized knowledge of the proposed activity; board members; middle managers; and/or front-line staff. In a partnership situation, it would typically include representatives from each potential partner or group of partners.

Begin by identifying any specific skills, knowledge, experience, or connections you will need, then think about what mix of individuals will best provide those while also working well as a team.

Skills, knowledge, experience or connections desired:

- Financial analysis skills
- Knowledge of organizational structures and systems
- Program knowledge
- Experience with starting / growing organizations
- Strong connections with (select): funders, constituents, partners, potential partners, \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

NAME	TITLE /POSITION	SPECIFIC SKILLS, KNOWLEDGE, EXPERTISE AND/OR CONNECTIONS
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		