



Strategic Planning Framework Worksheet

1. Strategic Planning Readiness Checklist

Before you begin the strategic planning process, consider whether you have the following criteria for successful planning in place:

Yes	No	Criteria
		Commitment and support from top leadership, especially the executive director and board president, throughout the entire process.
		Commitment to clarifying roles and expectations for all participants in the planning process, including clarity as to who will contribute to the plan and who will be the decision-makers.
		Willingness to understand and respond to the organization's internal and external environment (strengths, weaknesses, opportunities, and threats); a commitment to gathering relevant information for assessing current programs and evaluating how to meet current and future client needs—sufficient market research.
		A diverse group of individuals who are willing to be active participants on the Planning Committee.
		Willingness to be inclusive and encourage broad participation, so that people feel “ownership” of and are energized by the process.
		An adequate commitment of organizational resources to complete the planning process as designed; for example, staff time, board time, dollars spent on the process (for market research, consultants, etc.), etc.
		A board and staff that understands the purpose of planning, realizes what it is and is not able to accomplish, and has consensus about the desired outcomes of the planning process.
		A willingness to question the status quo, to look at new ways of doing things; a willingness to ask the hard questions, face difficult choices, and make decisions that are best for the clients.
		Good working relationships and no serious unhealthy conflicts between key players.
		An understanding and appreciation of key lessons from the organization's history (successes and challenges).

Comments:

3. Methods of Input

Carefully consider which of the following methods would be most useful in gathering input. Who would you include? How would you accomplish it?

- One-on-One interviews

- Focus Groups

- Surveys

- Internal Assessment

4. Vision and Mission

a. Your *vision statement* describes the collective hopes and dreams of your organization, your ultimate measure of success. Write down your vision here:

Does it accurately reflect the vision of the organization? Does everyone agree that this is the vision you are working toward? Is it your "Oz"? What might need to change?

b. Your mission statement describes your purpose and answers the questions of who, what and why. Write down your mission statement here:

How does it answer:

- Who do you serve?
- What do you do?
- What do you do the work?

5. Critical issues

a. Take a few minutes and think about what you believe are the most critical issues facing your organization.

b. Take one critical issue and write a SMART goal for how you might respond to that issue.

c. How will you measure whether this goal has been achieved?

d. Write three general strategic initiatives you might develop to help achieve your SMART goal.

e. How will you measure whether these strategies are achieved?



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