

WHEELHOUSE CHECKLIST 4



Planning self-checkup for community organisations

	Yes	Sometimes	No	Don't know	N/A
Is strategic planning high up on your priority list? Do you review your plan regularly – e.g. each year?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Does your group or organisation have resources (scheduled time, staff support, money, etc.) set aside just for strategic planning?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do all people whose role in the group or organisation might be significantly affected by strategic planning participate in the process?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Does your organisation have a vision and/or mission statement(s)? Is it written down? <input type="radio"/> YES <input type="radio"/> N/A <input type="radio"/> I don't know <input type="radio"/> NO	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are your board, volunteers and staff aware of the vision and/or mission? Do they understand what it actually means?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Does your group or organisation have written long-term (3-5 years) and short-term (1-year) goals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have you worked out how you can measure your goals and what evidence you can provide?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are the goals realistic? i.e not too easy or not too hard to achieve and how do you know? Are they based upon experience and/or research?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Does your group or organisation regularly measure actual performance against your goals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you consider external factors or key threats to the organisation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you consider strengths and weaknesses in achieving your organisation's goals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you consider if you are able to achieve the goals with your existing resources? This could be money, equipment, staff and volunteers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you consider the skills and knowledge of people in achieving your goals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you explore and consider different options to best meet your goals?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you make decisions (implementation and action plans) based upon your strategic plan?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you clearly assign lead responsibility for action implementation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are sufficient resources allocated for implementing the actions in your plan?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you clearly define measurable performance standards for each aspect of delivery?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have you developed an organised system for monitoring and measuring performance against your plan?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do you review data regularly and revise decisions as appropriate?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Is your group or organisation fully up to date and compliant with relevant legislation? – i.e. Health & Safety At Work Act, Vulnerable Children's Act and Financial Reporting Standards for Registered Charities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>