

STRATEGIC PLANNING

Planning checklist

	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?	☐	☐	☐	☐	☐
Does your group or organisation have resources (scheduled time, staff support, money, etc.) set aside just for strategic planning?	☐	☐	☐	☐	☐
Are your board, volunteers and staff aware of the vision and/or mission?	☐	☐	☐	☐	☐
Do they understand what it actually means?	☐	☐	☐	☐	☐
Have you worked out how you can measure your goals and what evidence you can provide?	☐	☐	☐	☐	☐
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?	☐	☐	☐	☐	☐
Does your group or organisation regularly measure actual performance against your goals?	☐	☐	☐	☐	☐
Do you consider strengths and weaknesses in achieving your organisation's goals?	☐	☐	☐	☐	☐
Do you consider if you are able to achieve the goals with your existing resources? This could be money, equipment, staff and volunteers.	☐	☐	☐	☐	☐
Do you consider the skills and knowledge of people in achieving your goals?	☐	☐	☐	☐	☐
Do you explore and consider different options to best meet your goals?	☐	☐	☐	☐	☐
Do you make decisions (implementation and action plans) based upon your strategic plan?	☐	☐	☐	☐	☐
Do you clearly assign lead responsibility for action implementation?	☐	☐	☐	☐	☐
Are sufficient resources allocated for implementing the actions in your plan?	☐	☐	☐	☐	☐
Have you developed an organised system for monitoring and measuring performance against your plan?	☐	☐	☐	☐	☐
Do you review data regularly and revise decisions as appropriate?	☐	☐	☐	☐	☐
Is your group or organisation fully up to date and compliant with relevant legislation?	☐	☐	☐	☐	☐
Do the people, who have roles in the group or organisation that could be significantly affected by the strategic planning, get to participate in the process?	☐	☐	☐	☐	☐
Does your organisation have a vision and/or mission statement(s)?	☐	☐	☐	☐	☐
Is it written down?	☐	☐	☐	☐	☐
Does your group or organisation have written long-term (3-5 years) and short-term (1-year) goals?	☐	☐	☐	☐	☐
Do you clearly define measurable performance standards for each aspect of delivery?	☐	☐	☐	☐	☐
Do you consider external factors or key threats to the organisation?	☐	☐	☐	☐	☐