

Strategic Planning Checklist

1. What is the planning horizon? _____

2. When should the planning process be completed? _____

3. Who should be responsible for planning to plan (Steering Group)? _____

4. Which individuals and/or categories of individuals should be part of the Planning Group?

5. When and where should the initial Planning Group retreat be held?

Date _____ Times _____

Place _____

6. Which of the following components of your internal environment should be reviewed by the Planning Group?

- | | |
|---|---|
| <input type="checkbox"/> History | <input type="checkbox"/> Existing market/customers/clients/constituents |
| <input type="checkbox"/> Mission | <input type="checkbox"/> Key trends (numbers, dollars) |
| <input type="checkbox"/> Organizational Structure | <input type="checkbox"/> Overview of Programming |
| <input type="checkbox"/> Informal Culture | <input type="checkbox"/> Other (specify) _____ |
| <input type="checkbox"/> Leadership (staff, board) | _____ |
| <input type="checkbox"/> Staff (roles/responsibilities) | |
| <input type="checkbox"/> Business (services, products) | |

7. Which of the following components of your external environment should be reviewed by the Planning Group?

- | | |
|--|--|
| <input type="checkbox"/> Potential market/customers/clients/constituents | <input type="checkbox"/> Future trends (economy, technology, society, culture) |
| <input type="checkbox"/> Competitors | <input type="checkbox"/> Informal cultures of the profession(s), industry |
| <input type="checkbox"/> Funders | <input type="checkbox"/> Other (specify) _____ |
| <input type="checkbox"/> Related systems (government, schools, agencies, etc.) | _____ |
| <input type="checkbox"/> Rules, laws, regulations | _____ |
| <input type="checkbox"/> Demographic changes (recent, past, projected) | |

8. What additional information should be reviewed by the Planning Group?

- Studies, reports
 - Descriptions of similar organizations
 - People with useful perspectives
 - Other (specify) _____
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9. Who, if anyone, should be interviewed prior to the retreat?

- Staff
 - Board
 - Planning Group
 - Other (specify) _____
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10. If interviews are conducted, which of the following questions should be included?

- In your own words, what should be the mission of the organization?
 - What are some of the most important things you would like to see the organization accomplish in the next two years?
 - Who are the organization's customers (in other words, whom should the organization serve and who benefits from the organization's services)?
 - What are the internal strengths of the organization?
 - What are the internal weaknesses of the organization (in other words, how is the organization vulnerable)?
 - What external opportunities are available or are likely to become available to the organization in the next few years that would help the organization to accomplish its mission?
 - What external threats exist or could exist in the next few years that would hinder the organization in accomplishing its mission?
 - What are important needs in the community where the organization could make a difference?
 - Do you have any other advice the organization should consider in developing its strategic plan?
 - Other questions (specify) _____
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11. What should be the nature of the final product? _____

- What I like about reports or plans: _____
- _____
- What I dislike about reports or plans: _____
- _____

Adapted from material developed by Dr. Carl M. Moore, Kent State University