



STRATEGIC PLANNING CHECKLIST

Timeline

- Do you have 3-6 meetings scheduled for your working group over the next 4-6 months? Do you have 1 large brainstorming session for your full team, and another meeting for the full team so you can present the final document?
- Is there protected time for pre-planning and for implementation of the plan itself?

Roles and responsibilities

- Who is doing what in the strategic planning process? Who will participate and who will facilitate? If you can, secure an outside facilitator so that everyone in your group can participate.
- How will your staff, board and stakeholders be included in the process?

Objective

- Is the purpose and outcome for your strategic planning process clearly defined for everyone? Why are you doing this? What will the final deliverable be?

Implementation

- How will you measure progress to your goals?

STRATEGIC PLANNING

MAIN ELEMENTS

- ❑ How will you check in on your progress?
 - ❑ How will you evaluate and update short-term goals?
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- ❑ **An End-State:** What does the world look like when we have accomplished our vision and mission? What does our organization look like?
 - ❑ **10-year Vision:** What does the organization look like in 10 years to be on the way to realizing our end-state?
 - ❑ **3-year Vision:** What does the organization look like 3 years from now to be able to meet our 10 year vision?
 - ❑ **SWOT Analysis:** What are the biggest hurdles standing in our way today to enabling us to meet our 3-year vision? What are our biggest strengths that we must maximize in order to meet our 3-year vision?
 - ❑ **12-month Goals:** What are 2-5 clearly defined goals we must meet in the next 12 months to help meet our 3-year vision?
 - ❑ **Key Performance Indicators (KPIs):** What are the metrics we are tracking to measure if we're on track to meet our 12 month goals?
 - ❑ **Roles and Responsibilities:** Who is doing what in the next 6-12 weeks to help us meet our 12 month goals?

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MAIN ELEMENTS

- ❑ **Monitoring and Updating:** How and when are we checking in on our short term goals, and how are we updating them as we progress through the year?