



Strategic Planning Assessment

NEVER		SOMETIMES		ALWAYS	
1	2	3	4	5	

1. We have a plan.

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2. Our plan is up to date and relevant.

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3. Our plan is being executed well.

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4. Our plan guides all we do.

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5. Our plan is regularly assessed and annually updated.

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6. Everyone in our organization knows the plan.

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7. Everyone in the organization knows where they fit and their role in accomplishing the plan.

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8. The leadership team and key staff feel a sense of loyalty to the plan.

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Choose your three lowest scores and discuss with your coach the next steps in improving them.

Strategic planning is a continual process that is used to set priorities, focus resources, and establish agreement on intended results. It shapes what an organization does with a focus on the future.



Undertaking a Strategic Planning Process

Board's Role and Staff's Role

Mission, Vision, Values	BOARD	STAFF	JOINT
Our Customers & What They Value	BOARD	STAFF	JOINT
Environmental Scan	BOARD	STAFF	JOINT
S.W.O.T. Analysis	BOARD	STAFF	JOINT
Trends	BOARD	STAFF	JOINT
Agreed Upon Assumptions	BOARD	STAFF	JOINT
Three-Year Visionary Priorities	BOARD	STAFF	JOINT
Top Five Goals	BOARD	STAFF	JOINT
Board & Senior Team Dashboard	BOARD	STAFF	JOINT
Updating Process	BOARD	STAFF	JOINT
Executive Summary	BOARD	STAFF	JOINT
The Rolling Three-Year Strategic Plan	BOARD	STAFF	JOINT

Sample Meeting Schedule for Planning

Meeting #1

1. Affirm Mission, Core Values
2. Conduct SWOTs Assessment
3. Environmental Scan
4. Trends and Assumptions

Meeting #2

5. Review and affirm work from Meeting #1
6. Three Year Visionary Priorities
7. Top 5 Goals
8. Assign Board and Senior Team Dashboard Work

Meeting #3

9. Review and affirm work from Meeting #2
10. Assign all remaining work
11. Create a communication plan



Next Steps and Work with your Coach

As a team, answer these questions:

1. Do we have a current strategic plan that is relevant, up-to-date, and guiding our work daily?
2. If NO, are we committed to create a plan in the next six months?
3. Do we have a clear idea of the delegation of responsibilities between the board and staff?
4. Can we see how the meeting schedule outlined above can be shaped to serve our process?
5. What role will our coach play?