



# STRATEGIC PLANNING CHECKLIST

## PURPOSE

To encourage critical thinking around the organisation's strategic planning process.

1. Has the board approved a process and timetable for producing the organisation's strategic plan?
2. Is there board and senior staff commitment to the planning process?
3. Have we confirmed the resources necessary for the process?
4. Do we need any research to inform the plan?
5. Have we agreed on the period the plan will cover, and have we confirmed the format and structure of the plan?
6. Have we accessed specialist advisers and commentators to challenge and stimulate our thinking?
7. Have we clarified how our stakeholders will be consulted?
8. Has the board reviewed the mission, vision and organisational values?
9. Do we have a clear description of our key customer segments, and their needs and expectations?
10. Are we satisfied with the accuracy of the draft business diagnostic, and especially the scan of our external environment?
11. Have we identified key strategic issues which affect the future of our organisation?
12. Have we discussed our organisation's strategic positioning?
13. Have we integrated targets and performance measures which will help us monitor progress?
14. Does the plan describe how the organisation will develop as well as how our programs and services will develop?
15. Have we identified and evaluated risks associated with the plan?
16. Have we developed a set of financial forecasts which accompanies the plan?
17. Have we circulated the draft plan internally and to other stakeholders for comment?
18. Have we formally adopted the plan at a board meeting?
19. Have we prepared an executive summary or overview to broadcast our key directions to stakeholders?
20. When will we review progress?
21. Have we operationalised the plan through a twelve-month business or operational plan which allocates responsibility for actions?

## SOURCE

- > Adapted from [BoardSource Strategy and Planning](#)

## REFERENCES

- > Fishel, D, *The Book of the Board*, Federation Press, Sydney, NSW (2003; 3rd edn. 2014)

## ABOUT POSITIVE SOLUTIONS

[Positive Solutions](#) offers a range of services to non-profit boards throughout Australia. [Board development workshops](#) and detailed board reviews can be tailored to the needs of each organisation. To find out more about how Positive Solutions can help you, contact: [info@positive-solutions.com.au](mailto:info@positive-solutions.com.au) or call 07 3891 3872.

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[The Book of the Board](#) is Australia's standard reference book for board and committee members of non-profit organisations. Authored by Positive Solutions Director, David Fishel, and currently in its third edition, *The Book of the Board* provides clear guidance on the role of the non-profit board, formal and legal responsibilities, and the ways in which the board can maximise its effectiveness for the organisation.

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