

Strategic Planning Readiness Checklist

On a scale of 1-5, rate how your organisation aligns with the following

Internal	1 to 5
Staff team & Board are clear and aligned with respect to the organisation's Mission, Vision, Purpose	
Organization is stable with no impending crisis	
There are no unresolved significant strategic issues or questions that could 'hijack' other discussions	
Team responds well to new approaches and ideas	
Organisation has the financial capacity to sustain itself for the immediate future	
TOTAL OUT OF 25	
External	
Time and capacity to devote to stakeholder engagement in the process (beneficiaries, users)	
Time and capacity to devote to stakeholder engagement in the process (donors, other key stakeholders)	
Time and capacity for competitors/ collaborators analysis	
Access to data for external context & emerging trends analysis	
Time for external context & emerging trends analysis	
TOTAL OUT OF 25	
Engagement	
CEO/SMT time and 'bandwidth' to lead a full Strategy Development process	
Staff team time and 'bandwidth' to engage with the Strategy Development process	
CEO/SMT capacity (skills, knowledge, experience) to engage in high-level strategic thinking about the future	
Board capacity (skills, knowledge, experience) to ask the right high-level strategic questions and to add value	
Board time and willingness to engage with the Strategy Development process	
TOTAL OUT OF 25	
Planning / resourcing	
CEO and Board are clear on the outcomes required from the Strategy Development Process	
Clear strategy development plan, indicating who will participate when, how, data required, milestones etc	
Clarity on how this process will align with other high-level business a) the Board cycle b) major donor requirements	
Access to a skilled facilitator, either internal or external	
Adequate budget calculated and assigned to the Strategic Development Process	
TOTAL OUT OF 25	
GRAND TOTAL OUT OF 100	

If you would like to have an informal chat about your organisation's readiness or any aspect of Strategy Development, please drop an email to jane@omnianda.com