

Strategic Planning Readiness Questionnaire

Are you:

- In the first year of implementing a new plan that's getting great results for your community?
- In the middle of hiring a new CEO or Executive Director?
- Unable to meet your current payroll or expecting to wind down within two months?

If you answered yes to any of these, you probably aren't ready to for a strategic planning process right now. If it's the last one, you may need a contingency or wind-up plan instead.

If you said no to all three, then it's a good time for strategic planning! Before you start contacting external people to help, think about these questions, because we'll ask!

- Has a small group that includes directors and the senior staff person been charged with overseeing the strategic planning process?
- Is there a champion of strategic planning on the board?
- Do we have some resources for planning? If not, do we have ideas for who might fund our planning costs?
- Is the board well informed about progress on the prior plan (if any)?
- Have we talked about what went well and what didn't in prior planning?
- Do we have a driving force, such as a government requirement, setting a deadline for our planning to be completed?
- Do we have events we want to build the planning schedule around, such as a conference or annual general meeting?
- Do we have events to avoid in the planning schedule, such as a annual gala or capital campaign?
- Has there been a really big change since the last plan, e.g., a merger or radical change in revenues, or is such a big change anticipated?
- Is there some internal situation, such a leadership change or conflict between leaders, that is really going to affect the planners?