

Is Your Organization Ready for Strategic Planning?

A readiness checklist for executive directors and board leaders

Strategic planning works best when an organization is ready for it. This checklist helps you take stock before you invest the time and resources. Check each item that is genuinely true for your organization right now.

Leadership & Stability

- We have an executive director who is expected to remain in their role through the planning process and into implementation.
- The board has stable leadership (chair, officers) or a clear transition plan in place.
- There is no active governance crisis, major conflict, or significant board/staff tension that would derail honest dialogue.

Board Engagement

- Board members are willing to participate meaningfully — not just rubber-stamp a staff document.
- The board understands its role in setting organizational direction.
- There is appetite at the board level to think critically and make real decisions about priorities.

Organizational Clarity

- We have a current, working mission statement (even if we expect it to evolve).
- Staff and board have a shared, basic understanding of what we do and who we serve.
- We are not in the middle of a major program restructuring or leadership transition that would make planning premature.

Data & Context

- We have access to basic program data (outcomes, reach, participant feedback).
- We have a reasonable picture of our financial position and trajectory.
- We are willing to hear from external stakeholders — clients, partners, funders, community — as part of the process.

Capacity & Commitment

- Leadership has time to participate in a planning process over the next three to six months.
- We have (or can identify) a realistic budget for the process.
- We understand that a plan without an implementation structure will not work, and we are committed to building one.

Reading Your Results

13-15	Ready to begin	You are in a strong position to start. Let's design a process that fits your organization.
9-12	Mostly ready	A few things to address first. A brief consultation can help identify what to shore up.
Under 9	Not yet	Strategic planning right now may produce a document no one uses. Worth a conversation about what you need first.

Ready to take the next step? Let's talk. noah@spiegelconsulting.com