

Organizational Alignment Checklist

A practical alignment check for leaders who need strategy, structure, operations, and performance management to work together. Use it to identify disconnects that create friction, duplication, or stalled execution.

ORGANIZATION	OWNER	DATE

Easy Adoption Summary

WHAT IT DOES	Helps leadership identify where strategy, structure, operations, or accountability are out of sync and turning into organizational friction.
WHO USES IT	CEO/Executive Director, senior leadership team, board leadership when appropriate, and owners of major functions or programs.
WHEN TO USE IT	Use quarterly, during annual planning, after a major reorganization, or whenever priorities are stalling across teams.
HOW TO USE IT	Complete the checklist as a leadership team. Require examples or evidence for each checked item. Score the organization, identify the 1-3 biggest disconnects, assign corrective actions, and recheck next quarter.

1. Strategy Alignment

Make sure everyday work connects to organizational direction.

	CHECKPOINT	NOTES / EVIDENCE
☐	Leadership and staff can explain the organization's mission, vision, and current priorities.	
☐	Programs, projects, and major investments can be linked to a strategic priority.	
☐	There is a shared understanding of what the organization will stop, start, and continue.	
☐	Competing priorities are resolved through an agreed decision process.	

2. Structure + Governance

Align roles, authority, and capacity with the work that matters most.

	CHECKPOINT	NOTES / EVIDENCE
☐	Leadership, staff, board, and committee roles are clearly defined.	
☐	Decision rights and escalation paths are understood.	
☐	The organizational structure reflects current programs, priorities, and workload.	
☐	Capacity gaps in people, skills, funding, technology, or partnerships are visible and addressed.	

3. Operations + Handoffs

Reduce friction by making the operating model clear.

	CHECKPOINT	NOTES / EVIDENCE
☐	Critical recurring processes are documented and consistently followed.	
☐	Systems and tools support the work instead of creating duplicate or manual effort.	
☐	Meetings, reports, and approval routines reinforce strategic priorities.	
☐	Cross-functional handoffs identify ownership, timing, inputs, and expected outputs.	

4. Measurement + Accountability

Create a shared view of performance and a routine for action.

	CHECKPOINT	NOTES / EVIDENCE
☐	Leaders use a focused set of KPIs or outcome measures to assess progress.	
☐	Performance information is reviewed on a predictable cadence.	
☐	Owners are accountable for follow-through on commitments and corrective actions.	
☐	Staff feedback, lessons learned, and performance trends inform continuous improvement.	

Readiness / Health Signal

13-16 checked Strong organizational alignment	9-12 checked Alignment gaps to address	0-8 checked Significant fragmentation risk
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Action Plan

Where is misalignment creating the greatest organizational friction?

Next Actions

ACTION / DECISION	OWNER	DUE DATE

Adoption tip: assign one owner to maintain this tool, store it with your operating or project documents, and revisit it on a predictable cadence.