

Strategic Planning Readiness Checklist

A practical readiness check for organizations preparing to build or refresh a strategic plan. Use it to identify what is already in place, what needs attention, and what leadership must resolve before planning begins.

ORGANIZATION	OWNER	DATE

Easy Adoption Summary

WHAT IT DOES	Shows whether the organization has the leadership alignment, evidence, focus, and implementation capacity needed to begin strategic planning well.
WHO USES IT	CEO/Executive Director, leadership team, board chair or planning committee, and the person coordinating the planning process.
WHEN TO USE IT	Use 2-6 weeks before launching a planning process, then revisit unresolved items before the first formal planning session.
HOW TO USE IT	Meet for 30-45 minutes. Check an item only when evidence exists. Add notes, total the score, select the top 1-3 gaps, assign owners and dates, then revisit before kickoff.

1. Leadership Readiness

Confirm the organization is prepared to make choices - not simply produce a document.

	CHECKPOINT	NOTES / EVIDENCE
☐	Leadership agrees on why a strategic plan is needed and what decisions it must guide.	
☐	An executive sponsor and final decision-maker are identified.	
☐	Board, leadership, staff, and stakeholder participation expectations are defined.	
☐	Time, budget, and internal capacity are committed to the planning process.	

2. Current-State Evidence

Ground the process in evidence about performance, needs, and the operating environment.

	CHECKPOINT	NOTES / EVIDENCE
☐	Current mission, vision, values, goals, and prior plans have been gathered for review.	
☐	Program, financial, operational, workforce, and performance data are available or can be assembled.	
☐	Key stakeholder groups and feedback sources have been identified.	
☐	External trends, risks, opportunities, peers/competitors, and community needs have been considered.	

3. Strategic Focus

Create the conditions for clear priorities and meaningful trade-offs.

	CHECKPOINT	NOTES / EVIDENCE
☐	The organization can name its most important strategic challenges or opportunities.	
☐	Leadership is willing to prioritize rather than treat every initiative as equally urgent.	
☐	The planning horizon and desired organizational outcomes are defined.	
☐	Criteria for evaluating and selecting strategic priorities are agreed upon.	

4. Implementation Readiness

Plan for execution while strategy is being developed.

	CHECKPOINT	NOTES / EVIDENCE
☐	Likely owners for strategic priorities and major initiatives can be identified.	
☐	Budget, staffing, technology, and partnership implications will be considered.	
☐	Each priority will include measurable outcomes or performance indicators.	
☐	A cadence for implementation review, reporting, and course correction will be established.	

Readiness / Health Signal

13-16 checked Ready to plan	9-12 checked Targeted preparation needed	0-8 checked Strengthen the foundation first
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Action Plan

What must be resolved before the planning process begins?

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.