

Should Our Organization Invest Time in Strategic Planning

A strategic plan can be a nonprofit leader’s most important tool. But how does an organization know when to invest the time and resources into a plan? The below statements will help you to develop a clear understanding of whether strategic planning is the appropriate next step for your organization’s success.

Rate each sustainability indicator on a scale of 1-5, with 5 being “extremely well” and 1 being “not well at all”.

Sustainability Indicator	Rating
We have a clear mission and vision.	
Our mission and vision are understood by community stakeholders and our current and potential donors.	
Our programs and activities are aligned with our mission and long-term goals.	
We are achieving the impact we desire in our community and/or with our target population.	
We are effectively managing resources (financial, human, and time) to achieve our goals.	
Our board members understand how they can best impact the organization and mission.	
There is a formal onboarding procedure for new board members, which includes a review of their roles, expectations, and how they can leverage their skills to contribute effectively.	
Our current revenue sources provide enough funding to support programs and initiatives effectively.	
Current revenue diversification is sufficient to sustain our programs and operations in the long-term.	
We have a development plan in place with key strategies for growing the donor base.	
There are goals and strategies in place for stewarding donors and maintaining strong relationships with them.	
We have conducted a strategic planning process in the past 3 years, and we have followed through on the action step outcomes from that process.	
We know the key milestones or goals we want to achieve in the next 3 years and know which action steps will support the initiation of these goals in the next 6 months.	
TOTAL SCORE	

45+ Keep rolling. Your plan is working!

44-25 You’re doing well. A strategic plan would be a helpful step to furthering organization impact.

Below 25 What are you waiting for?!