

ATTACHMENT 7 Strategic Planning Process – Checklist

PREPARATION	PLAN	IMPLEMENT	REVISE
Vision <ul style="list-style-type: none"> <input type="checkbox"/> With stakeholders, develop or update agency vision, mission, guiding principles Assessment <ul style="list-style-type: none"> <input type="checkbox"/> Gather internal and external information <input type="checkbox"/> Analyze the information <input type="checkbox"/> Draw conclusions Develop and Implement Planning Process <ul style="list-style-type: none"> <input type="checkbox"/> Engage major actors: <ul style="list-style-type: none"> <input type="checkbox"/> Agency decision makers <input type="checkbox"/> Agency staff <input type="checkbox"/> Stakeholders <input type="checkbox"/> Establish planning structure <input type="checkbox"/> Establish process for collecting input to develop the plan <input type="checkbox"/> Clearly define roles and responsibilities <input type="checkbox"/> Training for planning group <input type="checkbox"/> Define Planning Terms <input type="checkbox"/> Select Plan Format 	Develop Plan <ul style="list-style-type: none"> <input type="checkbox"/> Review assessment; build on analysis <input type="checkbox"/> Prioritize; consider needs, strengths and resources <input type="checkbox"/> Answer these questions: <ul style="list-style-type: none"> <input type="checkbox"/> What do we want to accomplish? (Goals and Outcomes) <input type="checkbox"/> What will we do to get there? (Strategies, Objectives, Action Steps) <input type="checkbox"/> How will we know if we are making progress? (Indicators, Measures, Benchmarks) <input type="checkbox"/> Who will be responsible? <input type="checkbox"/> When will activities and goals be completed? Draft Plan <ul style="list-style-type: none"> <input type="checkbox"/> Circulate draft and revise plan Finalize Plan <ul style="list-style-type: none"> <input type="checkbox"/> Share final plan with stakeholders and staff <input type="checkbox"/> Obtain official approval 	Communicate Plan <ul style="list-style-type: none"> <input type="checkbox"/> Distribute <input type="checkbox"/> Ongoing communication of plan Manage the Plan <ul style="list-style-type: none"> <input type="checkbox"/> Leadership assigns responsibilities Supervise Implementation <ul style="list-style-type: none"> <input type="checkbox"/> All managers supervise actual work <input type="checkbox"/> Local plans developed and implemented Monitor and Report on Progress <ul style="list-style-type: none"> <input type="checkbox"/> Develop reporting system for plan <input type="checkbox"/> Build on existing information systems and quality assurance systems <input type="checkbox"/> Monitor progress 	Review Progress <ul style="list-style-type: none"> <input type="checkbox"/> Review progress: <ul style="list-style-type: none"> <input type="checkbox"/> towards goals and outcomes and <input type="checkbox"/> towards implementing plan activities Reconvene planning process and revise plan <ul style="list-style-type: none"> <input type="checkbox"/> Reconvene planning groups <input type="checkbox"/> Ongoing assessment process <input type="checkbox"/> Draft revised plan <input type="checkbox"/> Circulate revised plan for input <input type="checkbox"/> Finalize revised plan <input type="checkbox"/> Communicate revised plan <input type="checkbox"/> Implement revised plan <input type="checkbox"/> Monitor revised plan