

# TOOL BOX

## STRATEGIC PLAN ASSESSMENT TOOL

The following assessment tool helps analyze your organization's need and readiness for strategic and marketing planning.

### I. DEVELOPMENT OF CORE VALUES AND MISSION STATEMENT

Indicator	Done	NEEDS WORK	
		Some	Much
1. THE ORGANIZATION has identified the Core Values and Core Values Statements that answer the question " <i>What do we stand for?</i> "			
2. THE ORGANIZATION has a clear, meaningful written mission statement that reflects its fundamental purpose and values and answers the question " <i>Why do we exist?</i> " rather than " <i>What do we do?</i> "			
3. THE ORGANIZATION's community has developed a shared vision statement that communicates in compelling way a picture of its future success.			
4. ALL ORGANIZATIONAL programs are congruent with core values and mission.			
5. The Mission Statement is widely understood, agreed upon and communicated throughout THE ORGANIZATION.			
6. THE ORGANIZATION has worked to identify and correct misalignments between values and actions.			



## II. EXTERNAL ENVIRONMENT

Indicator	Done	Needs Work	
		Some	Much
1. Current strategy anticipates short- and long-term competitive moves and other likely changes in the marketplace in the areas of social, technological, economic, environmental, and political factors that have relevance to its mission and vision.			

## III. INTERNAL ENVIRONMENT

Indicator	Done	NEEDS WORK	
		Some	Much
1. THE ORGANIZATION understands the wants, needs, expectations, and satisfactions of its internal stakeholders and has a system for evaluating their relevance to values, mission, and vision.			
2. THE ORGANIZATION meets the needs, wants and expectations of its internal stakeholders to the extent that they are aligned with values, mission and vision.			
3. The ORGANIZATION has a brand that is known, understood, promoted, and valued by its internal stakeholders.			

## IV. DEVELOPMENT OF A STRATEGIC PLAN

Indicator	Done	NEEDS WORK	
		Some	Much
1. THE ORGANIZATION's research has surfaced the three to five most critical issues and opportunities it faces and has developed a written strategic plan to address them.			
2. THE ORGANIZATION periodically reviews and recalibrates its strategic plan.			
3. THE ORGANIZATION has a written <i>Implementation Plan</i> for its strategic plan and a structure and a process in place to execute it.			



4. THE ORGANIZATION encourages strategic thinking.			
5. THE ORGANIZATION is inclusive in its planning process.			
6. THE ORGANIZATION is strongly committed to the strategic thinking process, demonstrated by engaging in a continuous cycle of planning, prioritizing, monitoring, evaluating, reporting and adjusting.			
7. THE ORGANIZATION has oriented its stakeholders to best practices in strategic planning and thinking processes.			
8. THE ORGANIZATION has developed a structure for ongoing Board planning and the development of strategic planning and thinking skills within community.			

#### V. DEVELOPMENT OF GOALS, STRATEGIES AND INITIATIVES

Indicator	Done	NEEDS WORK	
		Some	Much
1. The strategic plan sets clear goals and identifies strategic initiatives that address critical issues for the next 3-5 years.			
2. The plan integrates all ORGANIZATIONAL activities around a focused vision.			
3. THE ORGANIZATION prioritizes strategic plan initiatives and develops timelines for their accomplishments.			
4. Strategies have been developed that clearly describe the approach or method for attaining goals.			



## VI. DEVELOPMENT OF PERFORMANCE INDICATORS

Indicator	Done	Needs Work	
		Some	Much
1. The organization's strategic plan has an evaluation process and performance indicators to measure progress toward the achievement of goals and objectives.			
2. Through work plans, resources are allocated to insure the timely accomplishment of goals.			
3. The plan is communicated to all ORGANIZATIONAL stakeholders.			
4. The evaluation includes a review of THE ORGANIZATION's programs and systems to insure that they comply with its values, mission, and vision.			
5. The results of the evaluation are reflected in the revised plan.			
6. At the end of each year, THE ORGANIZATION conducts a comprehensive evaluation of its programs. This evaluation measures program outcomes.			



## VII. Marketing Strategy

Indicator	Done	NEEDS WORK	
		Some	Much
1. THE ORGANIZATION has a marketing philosophy.			
2. THE ORGANIZATION has clear short- and long-term marketing goals.			
3. THE ORGANIZATION has a clear product/service strategy.			
4. THE ORGANIZATION has a clear pricing strategy.			
5. THE ORGANIZATION has a clear distribution strategy.			
6. THE ORGANIZATION has a clear positioning strategy that creates value in the minds of its target audiences.			
7. THE ORGANIZATION has a clear promotion strategy.			
8. THE ORGANIZATION has a clear understanding of its brand.			
9. THE ORGANIZATION has a marketing communications plan that includes crisis communications strategies.			
10. THE ORGANIZATION has a written marketing plan.			
11. THE ORGANIZATION has a marketing budget.			
12. THE ORGANIZATION employs a senior administrator with organizational marketing responsibility.			
13. THE ORGANIZATION is aware of and practicing best practices in nonprofit marketing.			
14. THE ORGANIZATION has a proven way of getting marketing intelligence into its system and decision-making.			
15. THE ORGANIZATION'S BOARD OF TRUSTEES understands and executes its governance role in strategic marketing.			

