| PRE- Strategic Planning Checklist |  |
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| Component | Status | **Comments** |
| Has the organization ever completed a strategic plan? *If yes, respond to the following questions:* |  |  |
| 1. When was it completed? |  |  |
| 1. When does/did it expire? |  |  |
| 1. Who facilitated the process? |  |  |
| 1. Who participated in the process? |  |  |
| 1. Was the plan successful? |  |  |
| 1. If goals/objectives were not met, why not? |  |  |
| Who will facilitate the current planning process? |  |  |
| Who will participate in the process*? (Provide list)* |  |  |
| 1. Board members |  |  |
| 1. Staff |  |  |
| 1. Stakeholders/Donors/Members |  |  |
| 1. Clients/Population Served |  |  |
| 1. Community Partners |  | \*Secure key MOU’s from partners\* |
| Secure the following “benchmark data:” |  |  |
| 1. Organization Budget- current & prior 2 fiscal years |  |  |
| 1. Program Impact Data- number served annually per program & key statistics |  |  |
| 1. Staff/Volunteer Data- number of individuals, average hours worked/volunteered annually |  |  |
| 1. Outreach/Awareness efforts- annual statistics related to social media, number of press releases/media coverage, etc. |  |  |
| Establish planning format (work sessions at board meetings, retreats, task force, community forums, etc.) |  |  |
| How will participants be engaged in the planning process? (phone calls, face to face, surveys, community forums, invitation only, etc.) |  |  |
| What is the timeline for completing the process? |  |  |
| Who will type/format/edit plan and submit for review? |  |  |