



Strategic Planning Readiness Assessment

Determine whether your organization is prepared to begin planning

How to Use This Assessment

Complete the assessment with board and executive leadership before launching a strategic-planning process. Rate each statement from 1 to 4, then discuss evidence, gaps, and actions needed before planning begins.

Rating scale: 1 = Not in Place | 2 = Emerging | 3 = Mostly in Place | 4 = Fully in Place

Mission and Direction

Statement	1	2	3	4	Evidence / Notes
The organization has a current mission statement understood by leaders.	☐	☐	☐	☐	
Leadership has a shared understanding of whom the organization serves and why.	☐	☐	☐	☐	
Major decisions are evaluated against mission and long-term direction.	☐	☐	☐	☐	

Leadership Alignment

Statement	1	2	3	4	Evidence / Notes
The board and executive agree on the purpose and scope of planning.	☐	☐	☐	☐	
Roles in the planning process are clear.	☐	☐	☐	☐	
Leaders are willing to discuss difficult choices and competing priorities.	☐	☐	☐	☐	

Data and Evidence

Statement	1	2	3	4	Evidence / Notes
Current demographic, financial, program, performance, and stakeholder data are available.	☐	☐	☐	☐	
The organization can identify major trends, risks, and opportunities.	☐	☐	☐	☐	
There is a plan to gather missing information.	☐	☐	☐	☐	

Financial Readiness

Statement	1	2	3	4	Evidence / Notes
The organization understands its current financial position.	☐	☐	☐	☐	
Budget, cash flow, revenue assumptions, and major cost drivers are available.	☐	☐	☐	☐	
Leadership can estimate the resources required to implement priorities.	☐	☐	☐	☐	

Organizational Capacity

Statement	1	2	3	4	Evidence / Notes
The organization has sufficient leadership and staff capacity to participate.	☐	☐	☐	☐	
Current initiatives and commitments are documented.	☐	☐	☐	☐	
The organization can assign owners and monitor implementation.	☐	☐	☐	☐	

Stakeholder Engagement

Statement	1	2	3	4	Evidence / Notes
Key stakeholder groups have been identified.	☐	☐	☐	☐	
Leadership is prepared to gather and consider stakeholder input.	☐	☐	☐	☐	
The organization has a plan for communicating the process and results.	☐	☐	☐	☐	

Implementation Discipline

Statement	1	2	3	4	Evidence / Notes
Leaders are willing to prioritize rather than treat every idea as a strategic priority.	☐	☐	☐	☐	
The organization uses measures, owners, timelines, and accountability routines.	☐	☐	☐	☐	
There is commitment to review progress and adjust the plan.	☐	☐	☐	☐	

Scoring Guidance

Average Score	Readiness Level	Recommended Action
3.5–4.0	Ready	Proceed with planning while addressing minor gaps.
2.5–3.4	Conditionally Ready	Begin with a short preparation phase to address priority gaps.
1.5–2.4	Not Yet Ready	Strengthen leadership alignment, data, finances, or capacity before full planning.
1.0–1.4	Foundational Work Needed	Focus first on stabilization, governance, financial clarity, or leadership alignment.

Decision

☐ Proceed now
 ☐ Proceed after preparation
 ☐ Delay planning and complete foundational work

Readiness Action Plan

Priority Gap	Action Needed	Owner	Target Date	Status