

STRATEGIC PLANNING CHECKLIST



Planning Process

- General description of process implementation included in plan process documentation
- Consultant used
- If so, identify: _____
- Department/agency explanation of how duplication of program operations will be avoided included in plan process documentation
- Incorporated statewide strategic initiatives
- Incorporated organization internal workforce plans and information technology plans

Analysis Tools Used

- SWOT analysis
- Cost/benefit analysis
- Financial audit(s)
- Performance audit(s)
- Program evaluation(s)
- Benchmarking for best management practices
- Benchmarking for best measurement practices
- Stakeholder or customer surveys
- Undersecretary management report (Act 160 Report) used
- Other analysis or evaluation tools used
- If so, identify: _____

Attach analysis projects, reports, studies, evaluations, and other analysis tools.

Stakeholders (Customers, Compliers, Expectation Groups, Others) identified

- Involved in planning process
- Discussion of stakeholders included in plan process documentation

Authorization for goals

- Authorization exists
- Authorization needed
- Authorization included in plan process documentation

External Operating Environment

- Factors identified and assessed
- Description of how external factors may affect plan included in plan process documentation

Formulation of Objectives

- Variables (target group; program & policy variables; and external variables) assessed
- Objectives are SMART

Building Strategies

- Organizational capacity analyzed
- Needed organizational structural or procedural changes identified
- Resource needs identified
- Strategies developed to implement needed changes or address resource needs
- Action plans developed; timelines confirmed; and responsibilities assigned

Building in Accountability

- Balanced sets of performance indicators developed for each objective
- Documentation Sheets completed for each performance indicator
- Internal accountability process or system implemented to measure progress
- Data preservation and maintenance plan developed and implemented

Fiscal Impact of Plan

- Impact on operating budget
- Impact on capital outlay budget
- Means of finance identified for budget change
- Return on investment determined to be favorable