# Preparing to Plan: A Self-Assessment

*What kind of planning does your organization need right now, and what are you ready to take on?*

**How to use this tool.** Set aside about 30 minutes to complete it on your own. Then invite your board chair and one or two senior staff members to complete it. Compare answers. Where you differ is often where the most useful conversation begins.

**There are no right or wrong answers, and no score to pass. The goal is to define what a thoughtful and sufficient planning process looks like for your organization.**

## Why now?

**What is prompting you to consider planning? Check all that apply.**

- ☐ Our current plan has ended or is ending
- ☐ We're doing too much and need to focus
- ☐ Our funding or financial picture is shifting
- ☐ Board and staff need to get on the same page
- ☐ A funder or partner has asked for a plan
- ☐ We lack clear, shared priorities
- ☐ Leadership has changed or will change
- ☐ Community needs or our field are changing
- ☐ We have a plan but struggle to implement it
- ☐ Other: _____

**Where does your organization sit on each of these?**

| | | | | | | |
|---|---|---|---|---|---|---|
| Relatively stable | • | • | • | • | • | Facing instability (financial, leadership) |
| Low urgency | • | • | • | • | • | High urgency |
| Need to prioritize | • | • | • | • | • | Need to set new strategy |
| Driven by compliance | • | • | • | • | • | Driven by curiosity |
| Seeking improvement | • | • | • | • | • | Seeking transformation |

**What are you worried about? What opportunities do you see?**

## Looking back

**When was the last plan completed? How was it used to support the organization?**

**What was accomplished? What was left undone, and why?**

**What did you like about your last planning process? What would you do differently this time?**

## What kind of planning do we need?

*Work through these questions in order. Stop at the first "No."*

| Question | Yes | No | If No, consider… |
|---|---|---|---|
| 1. Do you clearly understand what you're working toward and why? Is that understanding rooted in recent information and insights, and is it written down and shareable? | ☐ | ☐ | **Strategic Plan** |
| 2. Have you identified the activities that will support your goals and strategies? | ☐ | ☐ | **Implementation Plan** |
| 3. Have you prioritized and assigned activities for the next year? | ☐ | ☐ | **Annual Work Plan** |

**Also consider scenario or contingency planning** if major uncertainty (e.g., funding or policy shifts) makes it hard to commit to a single direction. It can stand alone or be built into a strategic plan.

**Based on your answers, the type of planning that seems to fit best:** _____

## Readiness snapshot

*Be honest about capacity. A low rating just tells you what to plan for and how to right-size the process.*

| | Not yet | Somewhat | Mostly | Yes |
|---|---|---|---|---|
| **INVOLVEMENT** | | | | |
| Board and senior staff can commit the time a process will require. | ☐ | ☐ | ☐ | ☐ |
| We have a committee (standing or ad hoc) that could naturally lead the effort. | ☐ | ☐ | ☐ | ☐ |
| We know how we want to engage staff and the people impacted by our work. | ☐ | ☐ | ☐ | ☐ |
| **LEARNING** | | | | |
| We're clear on what we're curious about and what we need to learn to make decisions. | ☐ | ☐ | ☐ | ☐ |
| We have useful, recent information we can build on (data, feedback, reports). | ☐ | ☐ | ☐ | ☐ |
| **FOLLOW-THROUGH** | | | | |
| We have reporting or tracking routines the plan could plug into (e.g., ED reports, metrics). | ☐ | ☐ | ☐ | ☐ |
| We're willing to make hard choices about what to stop, right-size, or invest in. | ☐ | ☐ | ☐ | ☐ |
| **TIME, MONEY & LOGISTICS** | | | | |
| We have a realistic budget range and target timeframe. | ☐ | ☐ | ☐ | ☐ |
| Someone can coordinate scheduling and logistics. | ☐ | ☐ | ☐ | ☐ |

**Where do you feel most ready? Least ready? What would help close the gap?**

## Next conversations

*Bring these questions to your board chair and senior staff.*

1. Why are we considering planning now?
2. At the end of the day, what do we need this plan to accomplish?
3. What did we learn from our last plan and process?
4. What kind of planning fits our context?
5. What can we realistically commit, and what is sufficient?

**Our next step, who will take it, and by when:**

*Coming up in Session 2: Designing an Informed, Inclusive, and Right-Sized Process.* ***Bring your answers to the Readiness Snapshot!***