

Board Diagnostic

ARE YOU READY FOR STRATEGIC PLANNING?

Strategic planning is most effective when an organization has the capacity to make decisions, commit to priorities, and follow through on implementation.

Use this diagnostic to assess whether your organization is prepared to invest in a planning process—and to identify the conditions that will support success.

Rate each statement using this scale:

3 (strongly agree), 2 (mostly true), 1 (somewhat true), 0 (not true)



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SCORE TOTAL

Leadership Commitment

Our board understands its governance role and focuses on strategy rather than operations.

Board members are willing to make decisions about priorities, not just discuss ideas.

The executive director and board chair support strategic planning and will actively participate.

Leadership is willing to make difficult choices about what the organization will stop doing.

Board members are prepared to commit time to planning sessions and follow-through.

Subtotal

Organizational Stability

Leadership has access to reliable program and financial data.

The organization has a clear understanding of its financial position.

Staff roles and responsibilities are generally stable.

The organization has the operational capacity to implement new priorities.

Major organizational crises do not dominate leadership attention.

Subtotal

Clarity of Direction

Our mission and purpose are clearly understood across the organization.

Leadership agrees on the organization's core priorities.

We have a shared understanding of the community needs we are addressing.

Leadership can identify the organization's most important opportunities for growth or improvement.

Board and staff generally agree on what success looks like.

Subtotal

Governance Readiness

The board has an engaged chair who can lead discussion and decision-making.

Board meetings focus on strategy and performance—not just reports.

Committees are functioning and prepared to support implementation.

The board is willing to monitor progress and hold itself accountable.

Leadership understands that strategic planning includes ongoing oversight—not just creating a document.

Subtotal

Implementation Discipline

Leadership is willing to assign responsibility for strategic priorities.

The organization is prepared to measure progress toward goals.

Leadership is willing to adjust plans based on results and feedback.

Staff and board are open to changing routines or processes if needed.

Leadership understands that strategic planning is a continuous cycle—not a one-time event.

Subtotal

TOTAL

SCORE INTERPRETATION

60–75: Ready for Strategic Planning

Your organization has the leadership alignment and operational stability needed to move forward confidently.

Focus: Strategic direction, prioritization, and implementation planning.

45–59: Ready—with Targeted Preparation

Strategic planning can proceed, but a few foundational issues should be addressed early in the process.

Focus: Governance clarity, role alignment, and decision-making discipline.

30–44: Preparation Recommended Before Planning

Your organization may benefit from strengthening leadership systems before launching a full strategic planning process.

Focus: Board leadership, operational stability, and organizational alignment.

Below 30: Stabilize Before Planning

Strategic planning is unlikely to succeed until foundational leadership and operational issues are addressed.

Focus: Leadership structure, governance practices, and organizational stability.