Executing Your Strategic Plan: A Checklist

Step in CAPE Cycle	Key Strategies	Check Off When Completed
Step 1 -- **C**hampion	**Executive Director:** The executive director (or equivalent role) is effectively championing our strategic planning process. This responsibility has been built into the executive director's job description and evaluation. (Chapter 1)	☐
	Co-champion: The executive director is co-championing our planning process with another team member. (Chapter 1)	☐
	Engagement: We are engaging the board, staff, and possibly some key stakeholders in our strategic planning process. (Chapter 1)	☐
Step 2 -- **A**ssess	**Assessment:** We have a replicable assessment process that engages our team and provides insights that help shape our strategic plan. (Chapter 2)	☐
Step 3 -- **P**lan	**Plan Structure:** We have a simple and easy-to-communicate structure for our strategic plan, like the two-section Compass and Action format. (Chapter 3)	☐
	Organizational Vision: We have a documented vision for what our organization will look like in three years. (Chapter 3)	☐
	Goal Structure: Our team has a common understanding and format for writing goals. (Chapter 4)	☐
	Process-based Goals: We effectively utilize process-based goals to build our organizational capacity. (Chapter 4)	☐
	Key Metrics: We have a set of key metrics that clarify our desired impact. (Consider addressing this after your overall planning process is dialed in.) (Chapter 5)	☐
	Mission and Vision Statements: We have both a clear mission statement and vision statement. (Chapter 6)	☐
	Values: We have a clear and defined set of core values. (Consider addressing this after you've got both your mission statement and vision statement set.) (Chapter 6)	☐
Step 4 -- **E**xecute	**Process:** We approach strategic planning as an ongoing process (like the CAPE Cycle). (Chapter 2)	☐
	Calendar: We utilize a one-year calendar for our suite of strategic planning meetings. (Chapter 2)	☐
	Goal Accountability: Each of our goals has a due date, at least one champion, and possibly some key team members. (Chapter 4)	☐
	Monthly Measurement: We faithfully measure progress on the goals in our strategic plan on at least a monthly basis. (Chapter 5)	☐
	Measurement Method: We have a simple and effective methodology for measuring progress on our goals (and key metrics, too, if they are identified). (Chapter 5)	☐
	Reinforce Our Compass: Our team regularly takes time to reflect upon the key elements of our plan's Compass (e.g., the mission, vision, and values). (Chapter 6)	☐
	Leverage Software: We utilize strategic planning software to make our strategic planning process easier and more effective. (Chapter 7)	☐