

Strategic Planning Process Rating

Year: _____

		Elements	Rating					Comment
			5	4	3	2	1	
Develop		1. The SWOT process is inclusive, and includes all key stakeholders.						
		2. The SWOT process considers potential key challenges and opportunities.						
		3. The SWOT process considers operating performance.						
		4. Issues and opportunities are evaluated in the context of the mission and vision to determine direction.						
		5. The goals address the challenges and support the direction and focus.						
		6. Priority objectives are selected to support the goals and are based on gap analysis.						
		7. Priority objectives are measured with short and longer-term targets to close the performance gaps.						
		8. Objectives are balanced and address customers, workforce, and financials as a minimum.						
		9. Accountability is assigned for all objectives and gaps.						
Deploy		10. Deployment is based on facts and shows clear alignment throughout the organization.						
		11. A process is in place to communicate the plan and engage all employees.						
		12. Action plans are in place for key projects.						
		13. It is clear how the gaps will be closed and where the contributions will come from.						
Implement		14. Project Action plans are on schedule for each objective.						
		15. Gaps are closing as planned.						
		16. Reasons for slippage are known and addressed.						
Review And Evaluate		17. There is a systematic approach in place to review the status of the plan's execution at all levels.						
		18. The strategic plan and budget are integrated.						
		19. The planning process key milestones were completed per schedule.						
		20. Lessons learned from the planning and implementation processes have been documented and incorporated into the next planning process cycle.						
		Total Points						Average = Total Points Scored ÷ # of Elements (20) % = 100 x (Total Points Scored – Total Possible Points)
		Total Average						
		Total %						

Legend: 5 = Completely 4 = Mostly 3 = Minimal Acceptable Level 2 = Somewhat 1 = Barely or No