



Where the **Power of Business**  
Meets the **Passion of Giving**



## Best Practices Check List: Strategic Outcome Planning

1. Is the mission statement a clear, succinct statement of the reason for existence?	Yes	No
2. Is the vision statement a clear, specific, and compelling description of what the organization aspires to become or achieve? Is the vision bold and inspiring, represent an enduring or continuous change with substantial impact?	Yes	No
3. Does a common set of basic beliefs and values exist throughout the organization? Are they in alignment with values which best contribute to achievement of the mission and vision?	Yes	No
4. Is success in achieving the mission and vision defined? Is it measurable within a defined time table?	Yes	No
5. Is Strategic Outcome Planning carried out regularly with participation of board members and key stakeholders, including staff, clients, partners, and funders?	Yes	No
6. Do staff and some board members have extensive knowledge of the strategic landscape, i.e. industry players and alternative models in the program area?	Yes	No
7. Is the mission and vision translated into a 3 to 5 Year Strategic Outcome Plan with no more than 5 initiatives? Is this plan broadly known throughout the organization?	Yes	No
8. Does the Strategic Outcome Plan have time-bound, quantifiable milestones (performance targets) for all major initiatives? Are top milestones widely known throughout the organization?	Yes	No
9. Is the Strategic Outcome Plan reflected in an Annual Operating Plan which has been developed with key staff and approved by the Board?	Yes	No
10. Does the Annual Operating Plan have time-bound, quantifiable quarterly milestones for all major initiatives?	Yes	No
11. Do systems for data collection and tracking strategic and annual operating performance metrics exist, and are they effective? Do effective reporting systems exist to disseminate metrics and knowledge internally?	Yes	No
12. Are metrics and milestones used to track outcomes (lasting changes or impacts, i.e., results of doing things right) as well as outputs (things to do right)?	Yes	No
13. Do staff consistently adopt milestones (performance targets) and work diligently to achieve them?	Yes	No
14. Are ongoing performance metrics and achievement of milestones reviewed frequently and consistently? Does the board review Strategic Outcome Plan milestones and top Annual Operating Plan milestones?	Yes	No
15. Are departments integrated and experiencing few coordination issues when carrying out Annual Operating Plans?	Yes	No
<b>Current Best Practice (Capacity) Level:</b>	High (11-15)    Medium (6-10)    Low (1-5)	

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