

SELF-ASSESSMENT

DIRECTIONS

Complete the self-assessment below to determine which components you should include in your strategic planning process. If you already have a current version of a component, you don't need to include it in your workplan – just integrate it into your process. If you do not have one of the components, and are able to complete it, we recommend including all options. If you have limited capacity, we have starred (*) the components that should be highest priority.

Component	Description	Estimated time commitment	Already have?	Capacity/interest in completing?	Include in workplan?	Toolkit component
Basic statistics & information*	Gather key community info and stats to provide context for strategizing	60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Info and asset inventory
Asset inventory	List categorized assets to provide further context	60-90 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Info and asset inventory
Summary of key facts (or community profile)	Develop a key facts document to summarize the most relevant information for planning purposes	30 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Key facts template
Stakeholder list	List all stakeholders impacted by the process, as well as potential partners	30-45 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Stakeholder and partner identification
Stakeholder engagement plan	Create a plan for engaging identified partners and stakeholders	30-45 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Stakeholder and partner engagement; Stakeholder pull-out
Strategic assessment (i.e., SWOT or similar)*	Pinpoint the strengths, challenges and opportunities facing the community	60+ min., or individual conversations	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Strategic assessment
Vision for local economic development	Establish a vision to provide an ultimate goal that the strategy is working towards	30-60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Visioning

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Component	Description	Estimated time commitment	Already have?	Capacity/interest in completing?	Include in workplan?	Toolkit component
Strategic areas*	Identify the strategic areas or broad subjects to focus on (e.g., business retention & expansion; entrepreneurial development; downtown improvement)	30-60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Identifying strategic areas
Goals for strategic areas	Establish goals for each strategic area to focus the strategy	30-60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Strategic area goals
Prioritized action items*	Identify and prioritize specific action items to activate the plan	60-120 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Translating into action; Prioritizing Activities
Strategic plan document*	Put it all together in a written plan to get everyone on the same page	60-90 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Strategic plan template
One-page strategic plan overview	Create a one-page overview to help partners and stakeholders quickly and easily understand your plan	45-60 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Plan on a page template
Implementation workplan*	Develop an implementation workplan to move from plan to action	60-90 min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Implementation and monitoring plan template
Measurement plan	Use performance measurement to determine if the activities are having the intended effect	90+ min.	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Monitoring and measurement; Performance measurement toolkit
Evaluation plan	Use evaluations to help ensure that the program is on track or to determine if adjustments should be made	30-60 min. for plan; varied for execution	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	Evaluation; Evaluation plan template