

# A CHECKLIST FOR USEFUL AND PRACTICAL STRATEGIC PLANS THAT INCLUDE CORPORATE SOCIAL RESPONSIBILITY

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Most so-called ‘strategic plans’ are not strategic. Rather than having a primary focus on adding measurable value to society as well as organizational stakeholders, they focus on the organization itself—tactical planning—or on the performance of departments or groups within the organization—operational planning. (Kaufman, 2011, Kaufman & Guerra-Lopez, 2013).

Making money (or obtaining continued funding) and providing social good must not be mutually exclusive. In fact, there is increasing evidence that any organization that does not target adding value to our shared society—corporate social responsibility-- is likely to falter or even fail. The recent scamming of the public on diesel car emissions by Volkswagen show the sales decline or disappear when one puts their organization ahead of the public.

An organization can use a checklist to assure that everyone within an organization, including leadership, assures that the organization will deliver results that add measurable value for all internal and external stakeholders. Not only should an organization target external measurable results, but what is accomplished within the organization, in measurable performance terms, must align everything an organization uses, does, produces, and delivers.

A useful strategic plan will identify, define, and justify where the institution is going, why it is going there, how it will add value for all stakeholders—including social responsibility-- and provide the criteria for effective and efficient decision-making. It will also provide the criteria for planning how to achieve the organization’s mission so that financial, human, and physical resources may be properly allocated. Finally, it should provide valid data to justify what it uses, does, produces and delivers.

For a strategic plan to be useful, it must be built on hard evidence, not on judgments, feelings, or politics. Evidence of where an organization should head, and why it should go there is best obtained from a “needs assessment” that only collects data on gaps between current results and consequences and desired results and consequences. Gaps in means, programs, projects, and activities should only be addressed after needs are collected and prioritized on the basis of the costs to meet the needs as compared to the costs to ignore the needs.

It is key that all partners not only contribute to the plan but also commit to follow the results. A key indicator of the usefulness of a strategic plan is the extent to which it is used when decisions are to be made. Peter Drucker called getting the buy-in as “transfer of ownership” from “your plan” to “my plan.” All strategic plans must be based on solid data and information. There are several strategic planning imperatives, many of which are not included in current and popular approaches. These imperatives include (along with categories to assess any strategic plan) are in the following is checklist for all partners to calibrate the extent to which their organization will actually deliver useful results:

Characteristic	No	Yes	Partial	Missing
1. Has measurable performance evidence-based criteria				
2. Primary focus on ends and results and their consequences, not about means, programs, activities or delivery.				
3. Does not benchmark other institutions but builds on needs assessment data specific to the organization and its current and future clients				
4. All organizational criteria link performance criteria to adding value to societal ends including the entire ecosystem for the institution				
5. Enables justifiable evidence for how the results of using the strategic plan will demonstrate value to all of its stakeholders.				
6. Identifies and evidence-based results at all three levels of results: external contributions (Mega), organizational contributions, (Macro) and individual contributions (Micro).				
7. Performance data from each of these three levels are derived by documenting the gaps between current results and contributions and desired results and contribution.				
8. Data for performance criteria are based on a “needs assessment” where needs are gaps in results, not gaps in means or resources.				

9. The strategic plan is built on the organization's current and future realities and not upon the approaches used by others.				
10. The criteria provide the measurable evidence for identifying and selecting financial resources.				
11. The criteria provides the measurable evidence for identifying and selecting physical, capital, and human resources				
12. The criteria provides the measurable evidence for identifying and selecting and/or modifying programs, projects, and activities.				
13. The criteria provides the measurable evidence for identifying and selecting programs, projects and activities, that should be deleted or discontinued				
14. All governing board members, administrations, politicians, associates and representatives are actually committed to the plan.				
15. Uses a plan for collecting performance data on closing the gaps in results (needs) identified and selected).				
16. Uses a model or technique for determining measurable and valid value-added for all three levels of results.				
17. The plan targets social responsibility				
18. The strategic planners will constantly collect data on its effectiveness and efficiency and the plan is revised as required.				

## References and Related Readings

Kaufman, R. (2011) *A Manager's Pocket Guide to Strategic Thinking and Planning*. Amherst, MA. HRD Press, Inc.;

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