

# REALITY CHECKLIST

## ***What Do We Want From A Strategy?***

You want a strategy. But do you know what you want *from* a strategy?

Our experience with philanthropy practitioners suggests that sometimes the answer is no. Thinking carefully and concretely about what you want a strategy to accomplish is a valuable discipline. It can help you focus a strategic planning process and assess the results. Do you want a sharper sense of priorities? Clarity about your values? Consensus across your organization about your goals? A filter for upcoming opportunities? All of the above?

The key in designing an organizational strategy, we have found, is similar to designing any tool: you need to figure out how you want to use it. Think of your strategy more as verb than noun—how you need it to function. To help with that, we have designed this Pretty Good Tool. We have used it with clients to help them name what they want a strategy to do and then regularly get a reality check on how close their strategy is to doing it.

Check out the tool on the next page. Read the annotations that follow the tool for ideas on how to use it. Adapt the tool to fit your needs. Give it a try.

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## What Do We Want From A Strategy?

Use this tool with your strategy team to do a reality check on what you want from your strategy and how close you are to getting there. Read the checklist and decide as a team what needs to be modified, added or deleted. Have each team member rate the items on a 1-5 scale. Compare your ratings and discuss the implications.

What Do We Want?	Are We There?				
An optimal strategy will allow us to...	Not there...		...We're there!		
	1	2	3	4	5
1. Have shared clarity about our <b>mission, vision and values</b> .					
2. Understand and commit to <b>goals and strategies</b> .					
3. Ensure board and staff have sufficient <b>information and alignment</b> .					
4. Know what we're trying to achieve and can assess our <b>progress</b> .					
5. Make decisions about how to use our <b>resources</b> .					
6. Make decisions about which <b>opportunities</b> to go for and which not to.					
7. Develop a process for regular <b>reflection and adaptation</b> .					
8.					
9.					
10.					

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The items in this column articulate possible goals an organization might have for its own strategy. We recommend asking people with responsibility for strategy such as board members to fill out this checklist on a regular basis.

These ratings are primarily intended to track where the group average is on each of the questions. But when one board used the tool, they were more struck by the wide spread of the ratings than their average and used it as a sign that they needed to do a new planning process.

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	Not there...				...We're there!
An optimal strategy will allow us to...	1	2	3	4	5
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6. Make decisions about which <b>opportunities</b> to go for and which not to.					
7. Develop a process for regular <b>reflection and adaptation</b> .					
8. 9. 10. } Others					

Note this asks not only whether people know what the mission, vision and values are but how they influence the organization's work.

Ultimately we find that the ratings people assign here aren't as useful as the subsequent conversation about why they gave the ratings they did.

We suggested that one client also ask whether there is sufficient trust between board and staff.

Add any other elements!

A client added this critical element so that his organization would set itself up for continually revisiting and revising its strategy in light of changing circumstances.