



CAPACITYCANADA

Constructive Involvement: Roles and responsibilities of boards and management for strategic plans and planning

TASK	RESPONSIBILITY	
	Mgt.	Board
Developing a strategic planning process	X	
Assessing and approving the strategic planning process		X
Developing the mission, vision and values *	X	X
Assessing and approving the mission, vision and values		X
Developing the objectives	X	
Assessing and approving the objectives		X
Identifying the scope of activities and domain selections	X	
Assessing and approving the scope of activities and domain selections		X
Data collection and analysis with respect to the strategic plan	X	
Preparing the written strategic plan	X	
Assessing and approving the strategic plan		X
Scheduling strategic planning and strategy review meetings	X	
Preparing operating plans	X	
Preparing budgets	X	
Approving budgets		X
Preparing reports on the organization's strategic progress and accomplishment of strategic objectives	X	
Monitoring the execution of the strategy and its achievement		X
Approving changes to the strategy		X

* Traditional governance models restrict the board's involvement to reviewing and approving the mission, vision and values. However, recent research by the author suggest that superior organizational performance and innovativeness occurs when boards participate more actively in developing these strategic documents.

Reference: Page 12 of Dr. Chris Bart's 20 Essential Questions Directors of Not-For-Profit Organizations Should Ask about Strategy. ISBN 978-0-9732247-3-3