

Strategic Plan Post-Approval Workflow Checklist

For Municipal and County Clerks, Managers, and Staff

Plan Information

Name of Strategic Plan: _____

Approval Date: _____

Approving Body: _____

Official Record Location (minutes link / archive path):

Public Posting Location (URL): _____

1. Confirm the Official Record

- Final adopted version attached to meeting minutes
- Motion language and vote accurately recorded
- Document labeled “Final Adopted Version” with approval date
- Draft versions archived or clearly marked
- File stored in designated records location

Notes:

2. Assign Responsibility for Each Strategic Priority

Strategic Goal / Priority	Assigned Department / Role	Reporting Frequency	Initial Update Date	Notes
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- Responsible parties notified
 - Reporting expectations clarified
 - Assignments documented in shared location
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3. Integrate Into Meeting Workflow

- Plan referenced in relevant staff reports
- Strategic updates added to agenda calendar
- Review discussions scheduled
- Update format determined (written summary / presentation / other)

Next Scheduled Review Date: _____

Notes:

4. Align With Budget and Financial Planning

- Goals with budget implications identified
- Finance staff informed of relevant priorities
- Budget documents reference adopted strategic priorities (if applicable)
- Timeline alignment reviewed

Notes:

5. Establish Ongoing Review Rhythm

- Annual review scheduled
- Mid-cycle update scheduled (if applicable)
- Amendment procedure clarified (if needed)
- Review dates entered into calendar

Review Schedule:

Annual Review Date: _____

Mid-Cycle Review Date: _____

6. Communicate Internally

- Final plan distributed to department heads
- Reporting expectations shared

- Storage location confirmed
- Staff briefed on implementation timeline

Notes:

7. Communicate Publicly

- Final adopted plan posted publicly
- Document clearly labeled with approval date
- Draft versions removed or archived
- Relevant public references updated

Public Posting Verified On: _____

8. Track Ongoing Progress

Review Date	Summary of Status	Supporting Documents Attached	Follow-Up Required	Notes
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- Progress updates stored with official record
- Board or governing body notified as scheduled

Final Implementation Check

- Plan integrated into governance workflow
- Responsibility clearly assigned
- Review rhythm established
- Budget alignment considered
- Documentation current

Prepared By: _____

Date: _____