





Business Planning Checklist for HRSN Agencies

Documents for Review	Checklist	Notes
1. Board Governance Policies and Procedures	<input type="checkbox"/>	
2. Organizational Chart	<input type="checkbox"/>	
3. Agency Policies and Procedures Manual	<input type="checkbox"/>	
4. List of all programs and departments if not in org chart	<input type="checkbox"/>	
5. Most recent Strategic Plan	<input type="checkbox"/>	
6. Most recent Business Plan	<input type="checkbox"/>	
7. Most Recent Diversity, Equity, Inclusion and Belonging Plan	<input type="checkbox"/>	
8. List of current national accreditations	<input type="checkbox"/>	
9. Current budget	<input type="checkbox"/>	
10. Services Budget Tool for projecting new Start Up and Ongoing Program Costs	<input type="checkbox"/>	
11. Most recent financial audit	<input type="checkbox"/>	
12. List of electronic data systems used by staff and programs	<input type="checkbox"/>	
13. List of formal partner agencies with existing MOUs	<input type="checkbox"/>	
14. List of licensed staff - if HR is tracking license renewals include license #s	<input type="checkbox"/>	
15. Quality Assurance Plan	<input type="checkbox"/>	

Business Planning Checklist for Homeless and Supportive Housing Agencies

16. List of current funder and funding sources (only if not included in most recent audit)		
17. Mission Statement, Principles and Goals		
18. Job Descriptions for all current staffing positions		
19. Monitoring and Evaluation Reports: Performance management (indicators and measurement) capacity and experience		
20. Current affiliations with networks and other health and behavioral health organizations	