

Business Planning Checklist for Homeless and Supportive Housing Agencies

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

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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		