ORGANIZATIONAL ASSESSMENT

PLANNING QUESTIONNAIRE

To be completed separately by each of the following:

• Executive
• Board Chair

1. Is there an ongoing process used by the organization to:

   examine internal strengths and weaknesses       Yes ________   No _________
   examine external trends                         Yes ________   No _________
   establish priorities                            Yes ________   No _________
   systematically plan for the future             Yes ________   No _________

   Who participates in that process and how?  ________________________________________________________________
   ______________________________________________________________________________________________________
   ______________________________________________________________________________________________________
   ______________________________________________________________________________________________________

2. Does the organization have a formal strategic plan that was adopted within the past five years?

   Yes ________   No _________

   If yes, does the plan include details of implementation such as timeframes and persons responsible?

   Yes ________   No _________

   If yes, has the plan been reviewed and updated annually?

   Yes ________   No _________

3. If the organization has a strategic plan, do the board and staff refer to the plan when developing and evaluating initiatives and programs?

   Yes ________   No _________

   If not, why not?  ________________________________________________________________
   ______________________________________________________________________________________________________
   ______________________________________________________________________________________________________
   ______________________________________________________________________________________________________

The Long Island Center for Nonprofit Leadership at Adelphi University’s School of Social Work
Phone: 516-877-4429 Email: linonprofit@adelphi.edu
PLANNING QUESTIONNAIRE (continued)

4. Are any of the following operational plans in effect? (If yes, please describe who was instrumental in their creation [board, board committee, staff, others] and when each was last updated. A “no” response indicates that the item should be given attention.)

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