

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? _____

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.)

Fundraising Yes _____ No _____
Who _____ Last updated _____

Program Yes _____ No _____
Who _____ Last updated _____

Staffing Yes _____ No _____
Who _____ Last updated _____

Space/facilities Yes _____ No _____
Who _____ Last updated _____

Technology Yes _____ No _____
Who _____ Last updated _____

Equipment Yes _____ No _____
Who _____ Last updated _____

Other (describe) Yes _____ No _____
Who _____ Last updated _____
