

Exercise #1 (60–90 minutes)

Have your group answer the following questions. Depending on your group’s structure and circumstances, not all of the following questions may be equally relevant. As such, your organization may choose to spend more time on some of these questions than others. However, it is important to address as many of these as possible, as they set the stage for many of the discussions we will have as we move through the entire strategic planning process.

1. **Who are we? If someone asked us what our organization does, how would we answer the question?**

2. **What are the basic issues our organization seeks to address? Has this changed over the last 3–5 years?**

3. **What are our organization’s main philosophies and values?**

Exercise #1 (continued)

4. What makes our organization distinctive or unique?

5. Who are our customers or the primary beneficiaries of our services? How have they changed? How are they likely to change?

6. What have been our results? Have we measured and recorded these as effectively as we should? Where are these documented?

7. How effective has our staff been at addressing the needs of this organization and our clientele? Do we have measures of this and methods for addressing improvements?

Exercise #2 (at least 60–90 minutes)

For each of your current programs and activities, review the following questions. Consider how well each of your organization's programs fits together.

	Activity #1: _____	Activity #2: _____
1. Why is this service needed? What is the future demand?		
2. Are we the best organization to provide this service? If so, what makes us the best?		
3. Is this the most effective way for us to meet the needs of our clients? Could we meet those needs by providing the service differently?		
4. To what extent are we competing with other organizations to provide this service?		
5. Are we likely to have the future capacity to continue delivering this service as we have in the past?		
6. Are there other organizations or agencies with whom we ought to be partnering to deliver this service?		

Exercise #3 (time allocation will depend on committee structure)

For each of the standing and special committees within your organization or group, take a few moments to answer each of the following questions. Have each of your committees' members address the questions related to their committee's activities. If you have participants in the strategic planning process that are not formal members of any particular committee, assign them to one that's appropriate to ensure that you have input from all those involved. After completing this individual committee work, bring the whole group back together again to review each group's responses and ensure that everyone has a full appreciation of all the organizations structural components and responsibilities.

	Committee A: _____	Committee B: _____	Committee C: _____
1. What are the primary responsibilities of this committee?			
2. Does this committee have a written job description?			
3. When should the committee's job be completed?			
4. What are its primary limitations?			
5. What is its budget?			
6. What other resources are needed and what resources are available?			
7. What other committees does this committee regularly work with to fulfill its mission?			
8. To what extent does this committee's work still serve a critical role in fulfilling the mission of the organization?	1 – 2 – 3 – 4 – 5 Lowest—Highest	1 – 2 – 3 – 4 – 5	1 – 2 – 3 – 4 – 5
9. How well does everyone on this committee understand and contribute to the committee's activities?	1 – 2 – 3 – 4 – 5	1 – 2 – 3 – 4 – 5	1 – 2 – 3 – 4 – 5
10. How well does this committee address both its overall task and maintenance functions?	1 – 2 – 3 – 4 – 5	1— 2 – 3 – 4 – 5	1— 2 – 3 – 4 – 5
11. Rate the overall effectiveness of this committee.	1 – 2 – 3 – 4 – 5	1— 2 – 3 – 4 – 5	1— 2 – 3 – 4 – 5

Exercise #4 (time allocation will depend on committee structure)

Have every participant in your strategic planning effort complete the following survey of questions. (You may choose to have additional stakeholders complete the survey if it is appropriate to the strategic planning efforts you are undertaking.) The intent of this exercise is to assess both the level of effective communication and cooperation in your organization as well as the degree of consensus among members and committees.

In our organization	Strongly Disagree	Disagree	Agree	Strongly Agree
COMMITTEES				
Committee members understand the role their committees have within the larger organization.	1	2	3	4
The responsibilities of committee members are clearly and effectively defined.	1	2	3	4
Committee members understand their job responsibilities and generally accomplish what is expected of them.	1	2	3	4
Committees are characterized by cooperation and more or less equal contributions from all members.	1	2	3	4
The leadership of our committees is generally effective for the needs of the organization.	1	2	3	4
Subtotal				
BOARD OF DIRECTORS				
The board keeps committee members abreast of policy changes and other decisions.	1	2	3	4
The board listens to, and takes seriously, input from committee members and others regarding issues that affect the organization.	1	2	3	4
There is a good working relationship between the board and all committees.	1	2	3	4
Officers of the board have strong leadership skills.	1	2	3	4
Board members understand and support the mission of our organization.	1	2	3	4
The board effectively represents our organization to the public and external stakeholders.	1	2	3	4
The board uses consensus building in decision making.	1	2	3	4
The board assigns tasks effectively to committees, task forces, and/or staff.				
Subtotal				

Exercise #4 (continued)

In our organization	Strongly Disagree	Disagree	Agree	Strongly Agree
PAID STAFF (as appropriate)				
Our executive director and/or staff effectively and professionally accomplish the tasks expected of them.	1	2	3	4
Our executive director and/or staff effectively represents us to external stakeholders.	1	2	3	4
Our executive director and/or staff places the goals of the organization ahead of their personal priorities.	1	2	3	4
Our executive director and/or staff communicates effectively with the board and all committees.	1	2	3	4
Our executive director and/or staff takes direction from, and cooperates fully with, the board of directors.	1	2	3	4
Subtotal				
TOTAL				