

Strategic planning input survey

We are writing our next plan and want your view first. Your name is not needed.

Your group (staff, board, client ...)

Date

For each statement, tick one box from 1 (strongly disagree) to 5 (strongly agree).

1 How are you connected to this organization?

☐ Staff ☐ Volunteer ☐ Board ☐ Client ☐ Donor ☐ Partner

2 Overall, is this organization heading in the right direction?

☐ Right direction ☐ Mostly right ☐ Wrong direction ☐ Not sure

STATEMENT	STRONGLY DISAGREE			STRONGLY AGREE	
3 The need we exist to meet is as strong as ever.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
4 I can name a result this organization had last year.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
5 Our programs are the right mix for the years ahead.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
6 People who could use our services know how to find us.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
7 We work well with groups that serve the same people.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
8 People like me have a real say in our future.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
9 Which area deserves the most time and money in our coming plan?	☐ More of what works ☐ Reach new people ☐ Better quality ☐ Steadier funding ☐ Stronger team				

10 Finish this sentence: Our community needs this organization to...

11 What is changing in our community or field that the next plan must account for?

Thank you. Your answers go straight to the people writing the plan.

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Optional questions (1 of 3)

Add any of these to the core questions. Keep the numbering running on from page one.

Staff and volunteers

STATEMENT	STRONGLY DISAGREE				STRONGLY AGREE
12 I can see how my own work moves our goals forward.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
13 Our workload leaves room to take on something new.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
14 How much of your week goes to work that no current goal covers?	☐ Almost none ☐ About a quarter ☐ About half ☐ Most of it				
15 What would make the next plan easier to deliver in your role?					

Board members

STATEMENT	STRONGLY DISAGREE				STRONGLY AGREE
16 Board members agree on the top two or three priorities.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
17 Our meetings leave enough time for strategy, not just reports.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
18 I get the figures I need to judge progress on our goals.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
19 In the coming years, the organization should mainly:	☐ Hold steady ☐ Grow in size ☐ Focus on fewer areas ☐ Partner or merge				
20 What is the biggest decision this board must make in the next two years?					

Clients, members and community

STATEMENT	STRONGLY DISAGREE				STRONGLY AGREE
21 The services I use here meet my needs well.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
22 Getting help from this organization is simple.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5

Optional questions (2 of 3)

Add any of these to the core questions. Keep the numbering running on from page one.

Clients, members and community (continued)

23 In a typical month, how many times do you use what we offer?

☐ Every week ☐ Every month ☐ A few times a year ☐ Rarely

24 What do you need that no one nearby offers right now?

25 What would you miss most if this organization closed tomorrow?

Donors and funders

STATEMENT	STRONGLY DISAGREE				STRONGLY AGREE
26 This organization is the right group to lead on this issue.	☐	☐	☐	☐	☐

27 Which result would most make you increase your support?

☐ More people reached ☐ Deeper lasting change ☐ Lower cost per result ☐ New programs

28 Where do you see the biggest unmet need in this field over the next three years?

Feedback on the draft plan

STATEMENT	STRONGLY DISAGREE				STRONGLY AGREE
29 The draft goals can be reached in the time the plan covers.	☐	☐	☐	☐	☐

30 I can see ideas from the first survey in this draft.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

31 Which draft goal matters most to you?

☐ Goal 1 ☐ Goal 2 ☐ Goal 3 ☐ Goal 4 ☐ Goal 5

Optional questions (3 of 3)

Add any of these to the core questions. Keep the numbering running on from page one.

Feedback on the draft plan (continued)

32 What is missing from the draft?

A year into the plan

STATEMENT	STRONGLY DISAGREE				STRONGLY AGREE
33 I know which plan goals are on track and which are behind.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
34 The plan still guides the choices we make each month.	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5
35 Should any goal change before next year?	☐ Keep them all ☐ Change one or two ☐ Rethink several ☐ Not sure				

36 Which goal should change, and why?

About you (optional)

37 How many years have you been involved with us?

☐ Under 1 ☐ 1 to 3 ☐ 4 to 10 ☐ Over 10

38 What is your age group?

☐ Under 25 ☐ 25 to 44 ☐ 45 to 64 ☐ 65 or over ☐ Prefer not to say

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