

Assessing Your Team's Take on the Strategic Plan

Instructions

This anonymous survey has 7 basic questions about your staff team's interaction with the organizational Strategic Plan. The survey Part 1 and Part 2 will take about 5-minutes to complete. Part 3 is for the organizational administration to interpret the results of the survey.

Part 1 Strategic Planning Engagement

01 | I enjoy having a role in accomplishing the Strategic Plan's goals and/or outcomes.

Agree	Sometimes Agree	Disagree	I do not have a role in the Strategic Plan
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02 | In engaging with the Strategic Plan, I gain skills, information, or insights that I can use in my role at the organization and for my overall career.

Agree	Sometimes Agree	Disagree	I do not have a role in the Strategic Plan
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03 | The thing(s) that I value the most about the Strategic Plan include:

The roadmap in the Strategic Plan for where we're going as an organization	The knowledge of what I or my department are supposed to do to fulfill the Strategic Plan	The knowledge of what my colleagues are doing to fulfill the Strategic Plan	The process of building the Strategic Plan with the firm that we hired	Other	I do not have anything to value about the Strategic Plan
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04 | Is there anything else that is important to understand about your interaction with the Strategic Plan?

Part 2 Comfort with Strategic Plan

01 | My choices and opinions were valued in the process of creating the Strategic Plan.

Agree	Sometimes Agree	Disagree	I did not participate in the development of the Strategic Plan
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02 | I can look to my supervisor for guidance on how to fulfill my role in the Strategic Plan.

Agree	Sometimes Agree	Disagree	I do not have a role in the Strategic Plan
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03 | I can explain the Strategic Plan contents to guests and various stakeholder groups.

Agree	Sometimes Agree	Disagree
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Part 3 Take Action for organizational administration

Instructions

Based on the responses to this anonymous survey, the organizational leadership will summarize the quantitative data in the table below. This can then be used to inform the remaining years and uses still expected of the current Strategic Plan. The survey data can also be used to guide the next Strategic Planning process in terms of the values that guide the process and the external firm hired to facilitate that process.

Responses from Part 1 and Part 2 →		Agree	Sometimes	Disagree	"I do not..."	Other	I do not have anything to value about the Strategic Plan
		The roadmap in the Strategic Plan for where we're going as an organization	The knowledge of what I or my department are supposed to do to fulfill the Strategic Plan	The knowledge of what my colleagues are doing to fulfill the Strategic Plan	The process of building the Strategic Plan with the firm that we hired		
Engagement prompts	1						
	2						
	3						
	4						
Comfort prompts	1						
	2						
	3						
Average scores							

Instructions

Each year, this short, two-part worksheet can be completed by the Board and staff team individually or as a group. The responses to worksheet prompts assist the Board and staff team in evaluating progress and planning for the next year.

Part 1 What can be celebrated?

- One or more outcome from the Strategic Plan fully completed.
- One or more outcome from the Strategic Plan partially completed.
- The organizational team surpass expectations with any outcomes.
- The organizational team excited about current accomplishments.
- An outcome from the Strategic Plan is now obsolete because of fluid changes in your organization or the sector.

Take Action

Literally take a marker and cross-out those outcomes in the Strategic Plan that are no longer needing your team's brain space. With the Board and staff team, draft language about these accomplishments for celebrating in the website, annual report, and thank you letters to donors.

Part 2 Targets for the year ahead

- Outcomes in the Strategic Plan match-up with major events, activities, or agenda items already planned for the year ahead.
- Outcomes in the Strategic Plan align with the personal and professional goals of specific Board and staff members. Can these members be the year-long champion for accomplishing an outcome?
- Outcomes in the Strategic Plan align with open positions currently being recruited/hired for. Can the new Board or staff member be the year-long champion for accomplishing an outcome?
- Outcomes in the Strategic Plan require funding allotment and should go before the Board for an immediate planning session.
- Of the outcomes that were attempted last year, there were roadblocks. What can be done?
- Based on what was learned from engaging the Strategic Plan last year, some of the outcomes need to be adjusted (e.g. increase benchmark).

Take Action

With the Board and staff team, literally plan the ways that some Strategic Planning outcomes will be met by existing major events, activities, or agenda items. Include details of this alignment between those outcomes to be accomplished and existing details mapped-out in planning calendars.

Hold one-on-one meeting with current Board and staff members who you know are eager to build skills and champion certain Strategic Planning outcomes. Together, brainstorm what qualifies as "championing" and get buy-in. Make a fun and exciting announcement of the new champion and what is entailed in championing through the organizational newsletter, weekly email from the Executive Director, etc.

With the Board and managers, decide which job descriptions should be updated with components that reflect Strategic Planning outcomes. Also collaborate with the Board team on the needed funding for any outcomes that rely on such for being accomplished.