

Strategic Planning Toolkit: Needs Assessment Questionnaire

This Needs Assessment Questionnaire is a self-assessment tool that is designed to help you determine where your organization/agency is situated along the strategic planning continuum. This Questionnaire is a companion document to the Strategic Planning Toolkit and should be completed prior to reviewing the Toolkit. Once you have completed the Questionnaire, you will be able to identify those sections of the Toolkit that are most helpful and essential in your efforts to develop a strategic plan. This Questionnaire will also help you determine if this Strategic Planning Toolkit can assist your organization/agency or if more intensive technical assistance is required.

Using the scale below, please circle the number that best corresponds to your answer.

	No, not at all		Somewhat		Yes, definitely
1. Have you ever received training in strategic planning?	1	2	3	4	5
2. Have you ever been involved in strategic planning?	1	2	3	4	5
3. Do you currently have a strategic planning group?	1	2	3	4	5
4. Can you identify the key stakeholders that need to be included in the planning group?	1	2	3	4	5
5. Can you identify the individual interests of each key stakeholder?	1	2	3	4	5
6. Do you have buy-in from the stakeholders?	1	2	3	4	5
7. Is there a foundation of trust among stakeholders?	1	2	3	4	5
8. Do you know how to incorporate cultural competence in your planning process?	1	2	3	4	5
9. Do you have active, committed leadership for the planning process?	1	2	3	4	5
10. Can you identify who your clients are (i.e., all the groups of people who receive or use the resources and services provided by the your organization)?	1	2	3	4	5
11. Have you ever obtained feedback from clients and stakeholders?	1	2	3	4	5
12. Do you know how to incorporate client and stakeholder feedback into the planning process?	1	2	3	4	5
<i>Add up the scores for Questions 1 – 12, and record it in the space provided.</i>	Subtotal A:				
13. Have you ever used a structured method to gather information about your organization?	1	2	3	4	5
14. Are you familiar with any assessment models that provide a structured approach to gathering information?	1	2	3	4	5
15. Are you familiar with data collection tools that you can use in planning?					

	No, not at all		Somewhat		Yes, definitely
16. Do you know how to collect and use data to help you in the planning process?	1	2	3	4	5
17. Have you ever conducted a formal needs assessment?	1	2	3	4	5
18. Have you ever conducted a formal evaluation of the services your organization provides?	1	2	3	4	5
<i>Add up the scores for Questions 13 - 18, and record it in the space provided.</i>	Subtotal B:				
19. Has your organization developed a values statement?	1	2	3	4	5
20. Has your organization developed a vision statement?	1	2	3	4	5
21. Has your organization developed a mission statement?	1	2	3	4	5
22. Has your organization developed clear goals?	1	2	3	4	5
23. Has your organization developed specific, measurable objectives?	1	2	3	4	5
24. Has your organization prioritized the stated goals and objectives?	1	2	3	4	5
25. Do you know how to use the writing process of the plan to obtain buy-in from stakeholders?	1	2	3	4	5
<i>Add up the scores for Questions 19 - 25, and record it in the space provided.</i>	Subtotal C:				
26. Has your organization developed an action plan?	1	2	3	4	5
27. Has your organization developed a logic model?	1	2	3	4	5
28. Does your action plan define clear and achievable actions that support your objectives?	1	2	3	4	5
29. Does your action plan assign roles and responsibilities for each action?	1	2	3	4	5
30. Does your action plan set a timeline for each action?	1	2	3	4	5
31. Has your organization determined the resources needed to support the action plan?	1	2	3	4	5
32. Can you identify grant funding sources?	1	2	3	4	5
33. Can you identify successful grant-seeking strategies?	1	2	3	4	5
<i>Add up the scores for Questions 26 - 33, and record it in the space provided.</i>	Subtotal D:				
34. Can you identify the broader group of stakeholders that your organization regularly deals with?	1	2	3	4	5
35. Can you identify the different information needs of each group of stakeholders?	1	2	3	4	5
36. Can you identify the best method for communicating with each stakeholder group?	1	2	3	4	5
37. Has your organization developed a plan of communication with stakeholders?	1	2	3	4	5
<i>Add up the scores for Questions 34 - 37, and record it in the space provided.</i>	Subtotal E:				

	No, not at all		Somewhat		Yes, definitely
38. Has your organization developed goals for evaluation?	1	2	3	4	5
39. Has your organization determined who should conduct the evaluation?	1	2	3	4	5
40. Can you identify the different types of evaluations that can be used to assess strategic plan progress?	1	2	3	4	5
41. Has your organization determined the type of evaluation to conduct?	1	2	3	4	5
42. Has your organization written a structured plan for evaluation?	1	2	3	4	5
43. Has your organization established performance measures?	1	2	3	4	5
44. Does your organization track performance measures for evaluation purposes?	1	2	3	4	5
45. Does your organization know how to analyze and report evaluation results?	1	2	3	4	5
<i>Add up the scores for Questions 38 - 45, and record it in the space provided.</i>	Subtotal F:				
<i>Add up Subtotals A-F, and record the TOTAL in the space provided.</i>	TOTAL:				