

PRE-PLANNING ASSESSMENT

Environmental Analysis — external evaluation of factors affecting how the organization will be able to accomplish what it seeks to accomplish. These questions are just a starting point. Take the time to expand these questions to include the issues beyond what is provided here. Always examine each issue from both sides: what are the threats, what are the opportunities?

1. What are the current political issues that will affect the activities of this organization? How will a new administration change things? What about new senators and representatives now in Congress? What state and local political issues must be considered?
2. What are some changes to local, state and federal policies and laws that will affect this organization and its programs. How might interactions with agencies change? How might funding change? What is the time frame for these political implications? When will our programs need to respond?
3. How will the economic trends affect this organization? How will it affect funders, members, partners, this organization itself? What threats come out of these conditions? What opportunities?
4. What are some other major trends or hot issues that will affect this organization? How long will the interest in the inner city caused from the riots remain? What other highly sensational, highly visible issues are probably going to emerge this year, next year?
5. What are other organizations doing that may connect up to this organization's activities? How does our work fit into efforts for affordable housing, historic preservation, neighborhood revitalization, general environmental and conservation, etc?
6. Looking back at some outside issues that have blindsided us in the past, how can we better anticipate outside influences to our program? Have we had consistent problems/opportunities from certain sources, and can we anticipate those same problems/opportunities in the future?

PRE-PLANNING ASSESSMENT (CONTINUED)

Organizational Assessment — internal issues that affect the organization’s capacity to accomplish what it seeks to accomplish. Again, these are just starting questions — expand them to address what you already know to be your issues. Also, it is important to look at both sides of organizational capacity — what are your strengths, what are your weaknesses?

1. What questions and concerns seem to come up year after year for people within the organization? What recurring themes can be found?
2. Examine the success of past programs and projects. How do you measure success for each of these activities? How well did you do — did you meet the measure of success set up in these programs and projects? If not, why? If yes, why? What specific elements of those projects can you point to as the reason for success or failure?
3. If you don’t have measurable criteria for success for programs and projects, why? Is it because you never considered it, or do you have some resistance to the concept of measurable objectives? Determine what it will take to establish measurable, attainable statements for each program activity.
4. What are the activities of which you are most proud? What accomplishments are you most willing to parade before funders, friends and strangers? Why did they succeed?
5. What missed opportunities do you most lament? Which projects “got away” without you making the most of them? What caused you to miss the opportunity?
6. When looking at the problems facing the organization, which seem most fundamental — which problems cause other problems elsewhere in the organization?
7. Which strengths are also most fundamental? Which assets have made it possible to succeed beyond what is reasonable? Where is the magic of your organization?
8. Look at some possible scenarios: What if you were to double your budget in the next two years — where would you invest the money? Where are the greatest needs? What if you had to cut your budget in half? What would you keep? Which programs are your core, most important activities?