Sample Pre-Strategic Planning Survey

In order to prepare for the [date] strategic planning session, please complete the following survey and return it by [date] to our facilitator, [name], at [email address]. Your responses will remain confidential. Thank you.

Name (optional) ____________________________________________

1. Please list any of your current roles with [name of organization]: officer, board member, committee member, staff, volunteer, advisor, etc.

2. What topics or matters do you hope we can address at the planning session? Or, what would you like [name of organization] to focus on in the [year/months] ahead?

3. In your opinion, what are the most important services that [name of organization] currently provides to its members or constituents?

4. In your opinion, are there any services that [name of organization] does not currently provide to its members or constituents that it should consider offering or focusing on?

5. What do you consider to be [name of organization’s] strengths?

6. What do you consider to be [name of organization’s] weaknesses or areas to be improved upon?

7. What would you like to see [name of organization] do in order to become a better or more effective organization? (Think in terms of opportunities.)

8. What should [name of organization] do differently or change in order to remain a relevant and effective organization? (Remember to consider “competing” organizations.)

9. Is there a special function or role would like to play in terms of [name of organization’s] development (e.g. finances, fundraising, marketing, communications, planning, etc)

10. Other comments, suggestions, or ideas: ____________________________________________

Thank you for your input

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