

Association Planning Assessment

For each row, place a check mark beside the description that best reflects your current situation.

Types of Planning

Multi-Year Strategic Planning						
1	Laborious	<input type="checkbox"/>	Moderately onerous	<input type="checkbox"/>	A couple of productive days every few years	<input type="checkbox"/>
2	Board and staff know about it	<input type="checkbox"/>	Board and staff know and understand it	<input type="checkbox"/>	Board and staff know, understand and believe in it	<input type="checkbox"/>
3	It's on the shelf	<input type="checkbox"/>	Its reviewed and updated annually	<input type="checkbox"/>	It's a frequent reference source for Board and staff	<input type="checkbox"/>
4	Provides no targets to attain	<input type="checkbox"/>	Targets are simply directional	<input type="checkbox"/>	Targets are measurable, time-framed outcomes	<input type="checkbox"/>
5	It's not really communicated	<input type="checkbox"/>	Its communicated internally	<input type="checkbox"/>	It's widely communicated to our members and stakeholders	<input type="checkbox"/>
Annual Work Planning						
6	We don't do them	<input type="checkbox"/>	We do them informally	<input type="checkbox"/>	We have a well-defined process	<input type="checkbox"/>
7	Complete waste of time	<input type="checkbox"/>	Mostly, it's an additional burden	<input type="checkbox"/>	Helps everyone do their job	<input type="checkbox"/>
8	Takes weeks to complete	<input type="checkbox"/>	Takes days to complete	<input type="checkbox"/>	Takes less than a day	<input type="checkbox"/>
9	Done individually	<input type="checkbox"/>	Done individually and rolled by work units	<input type="checkbox"/>	Creates real opportunity for team-based planning	<input type="checkbox"/>
10	Not adjusted during the year	<input type="checkbox"/>	Conditions force necessary changes	<input type="checkbox"/>	Updated on a quarterly basis	<input type="checkbox"/>
Budget						
11	It's a standalone process	<input type="checkbox"/>	Some reference to either strategic or work plans	<input type="checkbox"/>	Integrated with strategic and work plans	<input type="checkbox"/>
12	No real review process	<input type="checkbox"/>	Reviewed quarterly	<input type="checkbox"/>	Reviewed quarterly and variance reporting is done	<input type="checkbox"/>
Total number of check marks			Total number of check marks		Total number of check marks	
Multiply the number of check marks by 1			Multiply the number of check marks by 3		Multiply the number of check marks by 9	
Total the three columns						

Interpreting the Scores

- Exceeding 96** – Congratulations. You have a planning system that is working for you.
- Between 74 and 96** – The planning system has significant strengths. There are likely specific aspects that can be improved.
- Between 52 and 74** – The planning system has some useful aspects, but overall it is not working for you.
- Less than 52** – This is an alert that the planning system is undermining your success.