

Conducting an Internal Analysis



PURPOSE

Gathering input from the organization's key leaders, such as board members, key staff, volunteers, partners, and others who are in a position to observe the organization will keep you updated as to how the organization is doing and help inform decisions and annual planning.

INSTRUCTIONS

Ask the board to thoughtfully answer the questions in Part 1.

Distribute Part 1 to the other stakeholders other than the board, asking them to thoughtfully answer the questions in part 1 and return to you by a specified date.

Once all worksheets have been handed in, compile the answers and then use the worksheet in Part 2 to identify themes.

Once Part 2 is completed, submit the Part 2 results to the full board along with the worksheet in Part 3.

FOLLOW-UP

Use the information to create an action plan for the year ahead.

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Part 1: Key Stakeholder Input - As key staff, volunteers, current and past board members, partners, etc. please answer the questions below. The answers will be compiled for a discussion by the board.

- Do you consider the organization to be in a stable period? If not, what concerns you the most?

- What do you feel are the main strengths of the organization?

- What do you feel are the main weaknesses of the organization?

- What opportunities do you think the organization should capitalize on in the coming year?

- What challenges do you feel the organization will be facing in the next year?

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Part 1 (continued)

What three things would you like to see the organization accomplish in the next year?

- 1.
- 2.
- 3.

What resources are needed to achieve #1? *(from above)*

What resources are needed to achieve #2? *(from above)*

What resources are needed to achieve #3? *(from above)*

Is there anything you think the board should take into consideration as they plan for the coming year?

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Part 2: Identify the Main Themes - Have a board, committee or staff member compile the information gathered in Part 1 and determine the main themes using the worksheet.

Main theme #1: _____

(List the various comments from Part 1 that pertain to this theme below)

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Main theme #2: _____

(List the various comments from Part 1 that pertain to this theme below)

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Main theme #3: _____

(List the various comments from Part 1 that pertain to this theme below)

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Main theme #4: _____

(List the various comments from Part 1 that pertain to this theme below)

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Main theme #5: _____

(List the various comments from Part 1 that pertain to this theme below)

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Main theme #6: _____

(List the various comments from Part 1 that pertain to this theme below)

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Part 3: Board Exercise

From the main themes of the compiled analysis from Part 2, rank the top two or three that you think the organization should focus on in the coming year.

- 1.
- 2.
- 3.

What else needs to be taken into consideration as you plan for the next year?