



## Strategic Management Questionnaire

### 3.1 Strategy Formulation

#### 3.1.1 Vision Statement

Has your association articulated a vision for the association? (10 -if YES 1 -if NO) 1 2 3 4 5 6 7 8 9 10

When was it last updated? (10 -if in the last year, 9 -if in the last 2 years, etc.) 1 2 3 4 5 6 7 8 9 10

Is the vision statement relevant to the association's activities and mandate? (10 -for very relevant 1 -not relevant at all) 1 2 3 4 5 6 7 8 9 10

#### 3.1.2 Mission Statement

Has your association developed a mission statement? (10 -if YES 1 -if NO) 1 2 3 4 5 6 7 8 9 10

When was it last updated? (10 -if in the last year, 9 -if in the last 2 years, etc.) 1 2 3 4 5 6 7 8 9 10

Do you feel that your current mission statement is compatible with the activities being carried on by the association? (10 -if YES 1 -if NO) 1 2 3 4 5 6 7 8 9 10

How would you rate participation in developing the mission statement by the:  
(10 -very involved 1 -not involved at all)

Membership 1 2 3 4 5 6 7 8 9 10

Board of Directors 1 2 3 4 5 6 7 8 9 10

#### 3.1.3 Understanding Values

Has your association defined a set of value statements? (10 -if YES 1 -if NO) 1 2 3 4 5 6 7 8 9 10

When were they last updated or discussed formally? (10 -if in the last year, 9 -if in the last 2 years, etc.)

1 2 3 4 5 6 7 8 9 10

How would you rate the understanding of the association's value statements (or values if formal statements have not been developed) by the:

Membership

1 2 3 4 5 6 7 8 9 10

Board of Directors

1 2 3 4 5 6 7 8 9 10

### 3.1.4 *Strengths, Weaknesses, Opportunities and Threats Analysis (SWOT)*

Has your association conducted a SWOT analysis? (10 -if YES 1 -if NO)

1 2 3 4 5 6 7 8 9 10

How would you rate the competencies of your association to conduct a SWOT analysis?

1 2 3 4 5 6 7 8 9 10

How would you rate the priority that your association places on the SWOT analysis process?

1 2 3 4 5 6 7 8 9 10

How would you rate the importance of the SWOT analysis process to the effective operation of your association?

1 2 3 4 5 6 7 8 9 10

Is a SWOT analysis employed when dealing with significant issues outside of strategic planning? (Score 10 for regularly - 1 for never)

1 2 3 4 5 6 7 8 9 10

### 3.1.5 *Understanding Issues that Influence the Association*

How would you rate the understanding of issues that influence the association by the:

Membership

1 2 3 4 5 6 7 8 9 10

Board of Directors

1 2 3 4 5 6 7 8 9 10

Executive Director

1 2 3 4 5 6 7 8 9 10

Relative to the decision making process, how would you rate your association's attention to issues that influence the association?

1 2 3 4 5 6 7 8 9 10

### 3.1.6 *Establish Long Term Objectives*

Has your association established long term objectives? (10 -if YES 1 -if NO)

1 2 3 4 5 6 7 8 9 10

How important is it to establish long-term objectives for your association? (10 -very important 1 -not important at all)

1 2 3 4 5 6 7 8 9 10

### 3.1.7 *Generate Strategies*

Rate your association's success/practice of generating strategies to deal with issues. 1 2 3 4 5 6 7 8 9 10

How important is it to generate strategies to deal with issues for your association? (10 -very important 1 -not important at all) 1 2 3 4 5 6 7 8 9 10

### 3.1.8 *Selecting Strategies to Pursue*

Does your association select strategies to address issues that confront the association? (10 -if YES 1 -if NO) 1 2 3 4 5 6 7 8 9 10

Rate the importance of selecting strategic solutions to address issues that confront your association. (10 -very important 1 -not important at all) 1 2 3 4 5 6 7 8 9 10

## 3.2 **Strategy Implementation**

### 3.2.1 *Policy Support*

Does your association maintain a policy manual? (10 -if YES 1 -if NO) 1 2 3 4 5 6 7 8 9 10

Are association policies updated on a regular basis? (10 -if in the last year, 9 -if in the last 2 years, etc.) 1 2 3 4 5 6 7 8 9 10

Rate the relevance of your association's policies to current association activities? (10 -very relevant 1 -not relevant at all) 1 2 3 4 5 6 7 8 9 10

Rate the understanding and support to formal policy development and implementation by the:

Membership 1 2 3 4 5 6 7 8 9 10

Board of Directors 1 2 3 4 5 6 7 8 9 10

Executive Director 1 2 3 4 5 6 7 8 9 10

### 3.2.2 *Financial Capacity*

Rate your association's financial capacity to implement strategies. 1 2 3 4 5 6 7 8 9 10

Rate the commitment to providing financial resources to support the implementation of strategic initiatives. (10 - very committed 1 -not committed at all) by the:

Membership 1 2 3 4 5 6 7 8 9 10

Board of Directors 1 2 3 4 5 6 7 8 9 10

### 3.2.3 *Motivation and Ownership*

Rate the motivation to maintain and support the implementation of strategic initiatives by the:

Board of Directors 1 2 3 4 5 6 7 8 9 10  
Staff 1 2 3 4 5 6 7 8 9 10

Rate the “ownership” taken to the implement strategic initiatives by the:

Membership 1 2 3 4 5 6 7 8 9 10  
Board of Directors 1 2 3 4 5 6 7 8 9 10  
Executive Director 1 2 3 4 5 6 7 8 9 10

### 3.2.4 *Board Support*

Rate your board’s commitment and support to the implementation of strategic initiatives. 1 2 3 4 5 6 7 8 9 10

Rate the performance of your Board as it relates to the delivery of support to strategic initiatives. (as opposed to “talking the talk”) 1 2 3 4 5 6 7 8 9 10

### 3.2.5 *Organizational Structure*

Rate how appropriate the current structure of your association is to support the implementation of strategic initiatives. (10 -very appropriate 1 -not appropriate at all) 1 2 3 4 5 6 7 8 9 10

Rate the effectiveness of your current governance model as it relates to the implementation of strategic initiatives. (10 -very effective model 1 -not effective at all) 1 2 3 4 5 6 7 8 9 10

### 3.2.6 *Open to Change*

Rate your association’s readiness for organizational change. (10 -very prepared 1 -not prepared at all) 1 2 3 4 5 6 7 8 9 10

Rate the willingness to accept and implement change (10 -very open 1 -not open at all) by the:

Membership 1 2 3 4 5 6 7 8 9 10  
Board of Directors 1 2 3 4 5 6 7 8 9 10  
Executive Director 1 2 3 4 5 6 7 8 9 10

### 3.2.7 Human Resources

Rate the human resource capability to manage and implement a change process or new strategic direction by the:

Membership 1 2 3 4 5 6 7 8 9 10

Board of Directors 1 2 3 4 5 6 7 8 9 10

Rate the competencies of your association staff to plan, manage and implement strategic initiatives.

1 2 3 4 5 6 7 8 9 10

## 3.3 Strategy Evaluation

### 3.3.1 Assessment

Rate your association's current practices as they relate to the ongoing assessment of strategic initiatives.

1 2 3 4 5 6 7 8 9 10

Rate your association's performance in communicating assessment results to the:

Membership

1 2 3 4 5 6 7 8 9 10

Board of Directors

1 2 3 4 5 6 7 8 9 10

Auditors/Public/Others

1 2 3 4 5 6 7 8 9 10

### 3.3.2 Measure Performance

Has your association developed a set of key performance indicators or some other form of accountability to track the success of strategic initiatives? (10 -for defined key performance indicators 1 -no indicators defined)

1 2 3 4 5 6 7 8 9 10

Rate your association's ongoing evaluation practices as it relates to strategic initiatives. (10 -doing a great job on a regular basis 1 -no evaluation occurs)

1 2 3 4 5 6 7 8 9 10

### 3.3.3 Identify Where Corrective Action is Necessary

Rate your association's success at identifying corrective action when strategic initiatives are failing or could be improved.

1 2 3 4 5 6 7 8 9 10

Rate your association's response time, after they acknowledge that a strategic initiative is failing.

1 2 3 4 5 6 7 8 9 10

### 3.3.4 *Assess Impact of Change/Participation*

Rate your association's effectiveness at evaluating the impact of changes subsequent to initial strategy formulation.

1 2 3 4 5 6 7 8 9 10

Rate the level of participation in strategy evaluation (10 -very involved 1 -not involved at all) by the:

Board of Directors

1 2 3 4 5 6 7 8 9 10

Executive Committee

1 2 3 4 5 6 7 8 9 10

Executive Director

1 2 3 4 5 6 7 8 9 10

Management Staff

1 2 3 4 5 6 7 8 9 10

### 3.3.5 *Moving Beyond Evaluation*

Rate the attention paid to abandoning, adjusting or developing new strategies subsequent to evaluation of the initial strategies by the:

Board of Directors

1 2 3 4 5 6 7 8 9 10

Executive Committee

1 2 3 4 5 6 7 8 9 10

Executive Director

1 2 3 4 5 6 7 8 9 10

Management Staff

1 2 3 4 5 6 7 8 9 10

Rate the relevance and suitability of the strategic management model to your association.

1 2 3 4 5 6 7 8 9 10

Rate the commitment to Strategic Management as the model of choice for your association by the:

Board of Directors

1 2 3 4 5 6 7 8 9 10

Executive Committee

1 2 3 4 5 6 7 8 9 10

Executive Director

1 2 3 4 5 6 7 8 9 10

Management Staff

1 2 3 4 5 6 7 8 9 10

**For those sections with average scores less than 7, consideration should be given to making corrective improvements.**