

**© Genesis of New American Leadership
Strategic Planning Assessment Organization Development (SPAOD) Questionnaire
(Islamic Institution—Not-for-Profit)**

Dear Representative: This document will be used throughout all planning phases and represents a critical component of your strategic planning process. All information is confidential. Answering the items on this form will help convey to your consultant the organization's status quo and complexity, initial assumptions, major positive events and challenges, and your expected outcomes of a strategic planning program. Using separate sheet(s), answer all applicable portions and provide any information you believe will best explain the organization's current situation. The more written information about an item, the greater the potential for problem solving and process improvement. Enter N/A for any item that does not apply. Some items are more subjective than others. Include qualitative and quantitative responses at your discretion including perceived strengths and weakness. It is okay if you do not know the answer to an item. Try to approximate objective data with percentages, ranges, median and averages, or raw numbers as appropriate. Each organization has unique characteristics resources, goals, and operating environment; therefore, it should not be inferred that all programs listed herein should be present in your organization. Please call your consultant at 904.434.5901 if you have questions or need explanation on any item.

PART I - ASSESSMENT

Item	Assessment Area/Issue	For Consultant Use
1.	Organization Operational Complexity	
a.	When was the organization established? How large is your membership? What are the general membership demographics: age, gender, marital status, ethnicity, education, income, time in the organization?	
b.	State annual gross receipts/revenues? Identify each revenue source as a percentage of the gross?	
c.	State organization's net worth.	
d.	List subsidiary units and comment on their size/operations/directors (school, daycare, library, cemetery, businesses, etc.).	
e.	Are you incorporated? How many directors or officers form your board of directors. How and when were they appointed? How large is the support staff? Is your board insured for liability?	
f.	Please sketch your organizational structure and show or explain administrative succession of leadership?	
g.	List organization's local and national affiliations/memberships and expected financial, civic or volunteer contributions to such entities.	
h.	Do you hold delegate status within any organization and/or participate in issuing/accepting responsibility for joint position statements that influence your and other member institutions' policies, public policy or other joint project collaborations.	
i.	What type of tangible membership benefits flow directly back to your organization as a result of your affiliations such as: a newsletter, education and training opportunities, advocacy and legal assistance, emergency funding or other financial assistance, award and recognition programs, preferred rates, discounts and credit card programs, etc.	
j.	List all established internal programs/events for members such as religious studies, member services and training programs that occur weekly, daily, monthly quarterly, and annually). What formal groups are established to meet these needs?	
k.	List formal outreach or broader community programs established. What formal groups are established to meet this need?	
l.	Describe the physical vicinity and setting of your location (residential/commercial, historic district, urban, rural, socio-economics, etc.)	
2.	Administrative Operations	
a.	Do you conduct organization management training & development for staff/volunteers? Please explain.	
b.	List published organizational documents: by-laws, incorporation documents, charters, constitutions, mission-vision statements, minutes of meetings, operating guidelines, membership handbook or criteria, other organizational literature for internal and external users.	
c.	What reporting requirements has the organization established or external reporting requirements the organization must meet?	
d.	Do you have a leadership or directing officer succession plan? Please explain.	

	PART I – ASSESSMENT (Con’t)	
e.	Describe your administrative support staff (number, age, experience, other, etc.)	
f.	Is cross-functional staff training established? Please explain.	
g.	What information do you maintain on your members?	
h.	Is there a staff performance appraisal and feedback process? Please explain.	
i.	Is there an established award and recognition program open to all members of your organization?	
j.	Is there an established method/process for election and appointment to offices of leadership? Please explain.	
3.	Technology, Communication & Data Management	
a.	Do you publish a newsletter? Maintain e-mail and a website?	
b.	Are your financial/membership records automated? Please explain.	
c.	List <u>organization</u> communications technology such as cellular, beeper, pager, computer, fax, video/audio/TV/multi-media overhead or presentation devices, etc.	
d.	Is there a formal letterhead, logo, organizational card, brochure, etc.? Please explain.	
4.	Organization History & Legacy	
a.	Is the history (people and key events) of your local organization preserved (published) in photos, essays, interviews, etc.? Please explain.	
5.	Financial Planning & Management	
a.	List fundraising activities event types and frequency.	
b.	List the type of accounts, assets, investments your organization owns.	
c.	Do you have a formal budgeting process? Audit process? Please explain.	
d.	Are there annual membership dues? Please explain.	
e.	Have you ever prepared or applied for endowment and grant programs? Please explain.	
f.	How many staff are salaried? Please explain.	
g.	Are there pension/retirement programs established for anyone? Please explain.	
6.	Records Management	
a.	Are important documents (insurance policies, deeds, lease agreements, accounting records) protected against fire or other damage? Describe protection method.	
b.	Is there a disaster recovery plan? Please explain.	
c.	How is private information on members safeguarded?	
7.	Media & Public Relationships	
a.	How would you describe your relationship with local print, radio, and TV entities?	
b.	Do you air/produce a TV/radio/internet program or maintain a column in a local paper?	
c.	How would you describe your relationship with your immediate neighborhood and city?	
8.	Government, Business, Civic, Political, Law Enforcement and Academic Relationships	
a.	How would you describe your organization’s relationships with the above entities?	
9.	Local Intrafaith Relationships	
a.	Describe your relationship with other masjid in your affiliation (city, state, national)	
b.	Describe your relationship with non-affiliated masjid.	
10.	Local Interfaith Relationships	
a.	Describe your relationship with non-Muslim religious organizations.	
11.	Targeted Member Special Interest Programs (formally established)	
	<i>Do you have...</i>	

	PART I – ASSESSMENT (Con’t)	
a.	Women interest programs? If yes, describe.	
b.	Men interests programs? If yes, describe.	
c.	Non-married interests programs? If yes, describe.	
d.	Marriage Counseling/Support programs? If yes, describe.	
e.	Youth interests programs? If yes, describe.	
f.	New member orientation programs? If yes, describe.	
g.	Senior interests programs. If yes, describe.	
h.	Special needs programs for families (disabled, single-parent homes, etc.)	
i.	Other special interest programs you wish to comment on...	
	12. Active Participation Rate	
a.	Of the persons listed in Item #1, what percentage are active financial supporters?	
b.	Of the persons listed in Item #1, what percentage actively volunteer time?	
c.	Have you conducted a human resource knowledge, skills, ability inventory?	
	13. Organizational Environment	
a.	Discuss your opinion on the general membership perception with respect to allegiance to the organization, its governing body, and support for its decisions and policies?	
b.	Discuss the general membership’s current morale level?	
c.	<i>During the last 12 months . . . (applicable to items d - g)</i>	
d.	List 5 organizational accomplishments you believe most strengthened or improved your institution. Please explain.	
e.	What top 3 events/factors occurred <u>inside</u> your institution that you believe now present current challenges for your organization? Please explain.	
f.	What top 3 events/factors occurred <u>outside</u> your institution that you believe now present challenges for your organization? Please explain.	
g.	Has your membership increased, decreased or remain constant? Please explain.	
h.	Is there a formal member suggestion system or comment program? Please explain.	
i.	How are personal conflict and grievances managed?	
j.	How are deviations in accepted personal standards of behavior or accountability addressed?	
k.	Is there a visitor data collection process established to capture/provide information? Please explain.	
l.	Is there a formal visitation and hospitality program? Please explain.	
	14. Safety, Security & General Risk Management	
a.	Is there a safety, security and risk management program? Please explain.	
	15. Physical Facility Management	
a.	Describe your plant & facilities inspection, maintenance, and improvement program.	
	16. Other	
a.	What are your mission, vision, guiding principle statements? Are they posted?	
b.	List all the functions your institution fulfills during the year.	
c.	What specific key indicators of your success or potential problems have been identified for tracking and analysis? Please explain.	

PART II – DEVELOPMENT

This area begins the focus on a desired state or future condition. Opportunities specifically refer to a favorable condition or circumstance that presents, but only for a limited period and requires action before the circumstances change. That action could be financial, political, or other. Threats are potential real or perceived issues that can harm the organization, its image or opportunities. When identifying external SWOT elements, consider all levels of your operating environment (from your neighborhood to the national and international level).

Item	Development Area/Issue	For Consultant Use
17.	Strengths, Weaknesses, Opportunities and Threats (SWOT)	
a.	Identify organizational strengths you will exploit to develop and execute your strategic plan?	
b.	What weaknesses do you believe if you overcome would facilitate execution of a plan?	
c.	What short term (within 12 months) opportunities do you wish to take advantage of?	
d.	What intermediate (within 18 - 36 months) opportunities you wish to take advantage of?	
e.	What internal threats can you identify?	
f.	What unique characteristics do you believe make your organization different from others who are in your affiliation?	
	<i>External Opportunities and Threats</i>	
g.	What circumstances or conditions outside the organization represent real opportunities?	
h.	What are the external threats to your organization?	
i.	What do you believe are the 3 most important issues facing your organization now?	
18.	Strategic Planning Experience Curve	
a.	Has the organization previously participated in formal strategic planning? Please explain.	

PART III – Institutional Leader Information, Background and Perception

This section ask leaders about their personal perceptions about the process of planning, expectations and outcomes.

Item (s):

- Name, mailing address, telephone(s), fax and e-mail.
- What is the title of your office of leadership?
- When did you assume your responsibilities?
- What is the history of your office, e.g., how long has it been established? How many predecessors? Any major restructuring of functions/responsibilities, etc.
- Were you a member of the organization before becoming a leader?
- What specific outcomes or benefits do you expect to achieve from a strategic planning process?
- What three organizational tasks presently take up the majority of your time?
- What three organizational tasks do you believe take up the majority of the staff's time?
- What are your personal fears or concerns about strategic planning?
- What is the most important function you believe a masjid performs?
- Has your directing officers, staff, and general membership read *Genesis of New American Leadership*.

Other specific comments/questions: What specific outcomes do you desire from a retreat?

Other concerns: Leaders attending the retreat will need to be prepared ahead of time to make the most of their efforts. Highly recommended preliminary suggestions for each attendee:

- Complete independently, Items 13a-f, 17a-i, 18, and Part III.
- Submit resume and CV
- Study the second half of *Genesis of New American Leadership (The Implementation)*, including all diagrams.

Retain your written answers for discussion with fellow leaders.

-----*(Cut here and mail the bottom portion only to FAMACO, Attn.: GONALI, 6001-21 Argyle Forest Blvd. 323, Jacksonville, FL 32244-6127)*-----

According to your perception, what statement below best expresses your feelings about your organization's overall performance in identifying and meeting its goals. Circle a letter (one choice only).

- (a) I am not sure.
- (b) I feel as if we are standing still and facing the wrong direction.
- (c) I feel as if we are facing the right direction and moving forward at a good pace, but could use some fine tuning.
- (d) I feel as if we are facing the right direction, but need help moving forward.
- (e) I feel as if we are moving in the wrong direction and underperforming relative to our potential.

Name of organization: _____

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