



ASSESS

Where Are We Now?

Before we decide where we're going, we need an honest picture of where we are.

LOOK

LISTEN

LEARN

ACTIVITY ≠ IMPACT

Being busy is not the same as being effective.

CREATES IMPACT

Name one thing your division does because it clearly creates value, engagement, or results.

MOSTLY TRADITION

Name one thing your division may continue doing mostly because “we’ve always done it that way.”

ASK YOURSELVES: IF WE STOPPED DOING IT, WOULD OUR MEMBERS NOTICE?

DIVISION HEALTH CHECK

Rate independently first. Then compare your ratings as a team.

Membership

1 2 3 4 5

Finances

1 2 3 4 5

Member Engagement

1 2 3 4 5

Professional Development

1 2 3 4 5

Leadership

1 2 3 4 5

Advocacy

1 2 3 4 5

Communication

1 2 3 4 5

Governance / Succession

1 2 3 4 5

1 = SIGNIFICANT CONCERN • 3 = FUNCTIONAL, BUT NEEDS ATTENTION • 5 = STRONG & SUSTAINABLE

WHAT IS THE STORY BEHIND THE SCORE?

The number matters less than understanding why you gave it.

Choose your **HIGHEST** and **LOWEST** ratings. Then dig into the story behind each one.

1

WHAT EVIDENCE SUPPORTS THE SCORE?

What facts, results, participation, feedback, or trends support your rating?

2

WHY IS IT THIS WAY?

What behaviors, systems, decisions, or circumstances created the current reality?

3

WHAT WOULD HAVE TO CHANGE?

What would need to happen for this score to improve—or for a strength to remain strong?

PAY ATTENTION TO WHERE YOUR TEAM DISAGREES — THAT MAY BE THE MOST IMPORTANT CONVERSATION.

PRIORITY ASSESSMENT

1

WHERE ARE WE NOW?



2

WHERE DO WE WANT TO BE?



3

WHAT MUST CHANGE?



SWOT: ONLY WHAT MATTERS

Focus on the three factors in each category that matter most to your division.

STRENGTHS

What gives us an advantage?

- 1 _____
- 2 _____
- 3 _____

WEAKNESSES

What is holding us back?

- 1 _____
- 2 _____
- 3 _____

OPPORTUNITIES

What could we take advantage of?

- 1 _____
- 2 _____
- 3 _____

THREATS

What could disrupt our progress?

- 1 _____
- 2 _____
- 3 _____

DON'T BUILD A LONG LIST. PRIORITIZE WHAT SHOULD SHAPE YOUR STRATEGY.

THROUGH THE MEMBER'S EYES

Look at your division from the perspective of the people you serve.

WHAT WOULD THEY SAY?

If I stopped a random member today and asked why they belong to your division, what would they say?

WHAT DO YOU WANT THEM TO SAY?

What do you WANT a member to say about why they belong to your division?

THE GAP BETWEEN THOSE TWO ANSWERS IS WHERE THE CONVERSATION BEGINS.

THE 3-YEAR REALITY CHECK

Move beyond today's challenges and identify what could shape your division's future.

What are the THREE issues that could most affect your division over the next three years?

1

ISSUE 1

2

ISSUE 2

3

ISSUE 3

IF WE DO NOTHING DIFFERENTLY, WHAT HAPPENS?

TOMORROW'S STARTING POINT

Based on everything you identified today, what are the **THREE** strategic issues your division must address?

1

Strategic Issue 1: _____

2

Strategic Issue 2: _____

3

Strategic Issue 3: _____

THESE THREE ISSUES BECOME YOUR BRIDGE INTO PART 2: WHERE ARE WE GOING?