

# Exercise: Develop Your Watchlist

## Instructions

Use this worksheet to list driving forces that impact your organization.

For each driving force, list the frequency – how often will you intentionally check on it.

Much of this is opportunistic – you always keep your eyes on these things, but having a routine of checking every week, month, or quarter, will ensure that you do not miss an important emerging force.

Finally, for each driving force, make notes on how you will find out what is happening in that area.

Your staff can support you in this, if you assign them an area to monitor. Your non-profit partners in the community can also be great sources of information.

Your board can provide valuable perspective on driving forces, and their input – their court sense – is a key part of your annual and multi-year strategic planning process.

Circle your top 3 ideas and decide when and how you'll put them into practice.

## Example:

Driving forces	Frequency	Source
<b>Macro forces</b>		
<i>Demographic trends</i>	<i>Annual</i>	<i>Reports from local cities, counties, other nonprofits.</i>
<i>The economy in general</i>	<i>Ad hoc – weekly</i>	<i>The Economist, local news</i>
<b>Micro forces</b>		
<i>Changes at partner and competitor organizations</i>	<i>Ad hoc</i>	<i>Getting out there. Talking with people.</i>
<i>Local election results, elected officials</i>	<i>Every election cycle</i>	<i>Local news + talking to people</i>
<i>Changes in local government budgets</i>	<i>Monthly</i>	<i>Attending meetings, minutes</i>
<b>Client feedback</b>		
<i>What impact are we having?</i>	<i>Weekly</i>	<i>Client testimonials Aggregated client survey feedback.</i>
<i>Emerging needs in the community</i>	<i>Quarterly</i>	<i>Client surveys, local news, talking with people</i>
<b>Strategic plan assumptions</b>		
<i>No additional funding available from County this year</i>	<i>Weekly</i>	<i>Attending meetings, talking to people</i>
<i>Our salary ranges remain competitive</i>	<i>Ad hoc</i>	<i>Monitor turnover rate, partner organizations. Talk to people.</i>

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Micro forces		
Client feedback		
Strategic plan assumptions		