

# Assessing Organizational Readiness

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- ◆ Assess existing management, financial and human capital resources and existing programs
- ◆ Survey community resources
- ◆ Determine gaps
- ◆ Evaluate organization's strengths, weaknesses, challenges, opportunities and threats
- ◆ Explore networks and collaborations
- ◆ Obtain buy-in from Board, management, staff, potential partners/collaborators, and potential participants

## Needs Assessment Survey Survey of Current and Potential Business Owners

Planning is underway for a microenterprise program in \_\_\_\_\_. The purpose of the new program is to assist potential and/or existing business owners to start and expand their businesses to meet their economic and personal needs. The new program intends to offer services in the following areas:

- Business development and growth
- Fundamentals of operating a business
- Technical assistance in specialized areas
- Individual consultants with small business expertise
- Financing
- Seed or start-up capital loans
- Loan packaging assistance
- Establishing bank relationships
- Expansion capital for existing businesses
- Expansion of market access
- Asset development
- (Insert a paragraph introducing your organization)

We are asking potential and current business owners for their input during the planning process for the new organization. A questionnaire is enclosed; the information you provide will help us design programs best suited to the needs of entrepreneurs in the community. If you would like more information about \_\_\_\_\_, please fill in your name and address on the questionnaire.

For More Information

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Please return the enclosed questionnaire by \_\_\_\_\_ to \_\_\_\_\_

Thank you

**The following topics address training, information and services involved in starting and operating a business. Please check the responses for all services that are appropriate for you:**

Needed

**Self - development**

- Goal setting \_\_\_\_\_
- Balancing business and personal life \_\_\_\_\_
- Work group to develop business idea \_\_\_\_\_
- Time management \_\_\_\_\_
- Assertiveness training \_\_\_\_\_
- Self-esteem \_\_\_\_\_
- Communication skills \_\_\_\_\_
- Other: \_\_\_\_\_

**Business Structure**

- Developing a business plan \_\_\_\_\_
- Selecting an ownership structure  
(sole proprietorship, partnership or corporation) \_\_\_\_\_
- Evaluation of business success \_\_\_\_\_
- Tax and legal questions \_\_\_\_\_
- Other: \_\_\_\_\_

**Marketing Products and Services**

- Defining product/service benefits \_\_\_\_\_
- Identifying target markets and accessing them \_\_\_\_\_
- Analyzing competition \_\_\_\_\_
- Choosing a business location \_\_\_\_\_
- Pricing products and services \_\_\_\_\_
- Advertising and promotion \_\_\_\_\_
- Selling strategies \_\_\_\_\_
- Marketing research \_\_\_\_\_
- Other: \_\_\_\_\_

**Financing**

- Estimating startup and expansion costs \_\_\_\_\_
- Projecting sales and expenses \_\_\_\_\_
- Obtaining credit \_\_\_\_\_
- Banking relationships \_\_\_\_\_
- Loans and other financing \_\_\_\_\_
- Determining loan amount required \_\_\_\_\_
- Other: \_\_\_\_\_

Needed

**Administrative**

Record keeping \_\_\_\_\_

Telephone answering \_\_\_\_\_

Secretarial services \_\_\_\_\_

Insurance \_\_\_\_\_

Wages and taxes \_\_\_\_\_

Other: \_\_\_\_\_

**Personal**

Child care arrangements \_\_\_\_\_

Financial assistance with child care \_\_\_\_\_

Dealing with feelings of isolation \_\_\_\_\_

Building a savings plan \_\_\_\_\_

Other: \_\_\_\_\_

The remaining questions relate to your business, its history and current situation. All of the information regarding your particular business is strictly confidential.

**Business Information:**

1. Type of business: \_\_\_\_\_
2. Year and month business was started or you plan to open: \_\_\_\_\_
3. Number of people initially employed (not including yourself): \_\_\_\_\_
4. Total projected or actual business sales during the first 12 months: \_\_\_\_\_
5. Amount of capital used or needed to start the business: \_\_\_\_\_
6. Sources of capital:
 

Bank loan: _____	Loan from family: _____
Loan from friends: _____	Savings: _____
Other: _____	

If you have difficulty financing the business, please describe:

# Program Design Issues

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Most organizations will need to consider, modify or develop the following:

- **Mission statement**  
*(concise, 1-2 sentences, meaningful to board and staff, continual revision when necessary)*
- **Values statement**  
*(Beliefs that guide the organization in working with its clients and among staff. Holds the organization to its commitment)*
- **Description of need**  
*(Typically based on a needs assessment. Helps organizations define goals and services)*
- **Goals**  
*(What the organization hopes to achieve; 2-5 statements with supporting objectives and outcomes)*
- **Target population**  
*(Geographic, socioeconomic parameters. Effects on program structure.)*
- **Program outcomes**
  - business starts
  - increases in income
  - movement off public assistance
  - personal empowerment
  - increased leadership skills
- **Program services**
- **Staffing plans**
- **Budget**
  - Operating Budget
  - Loan Fund
  - Loan Loss Reserve