

## IDEAS HUB WORKSHEET

## Strategy Screen

A Strategy Screen is a set of questions that specifically address your strategic goals. This tool will keep you focused on the things that best serve your organization's culture, priorities, and future.

### Step 1 – Gather key folks.

Gather a group from across your organization. Diversity in this group supports a more powerful and equitable decision-making tool.

### Step 2 – Start with basic questions.

Use these examples below as a starting point to name 5-8 questions that are important to your strategic goals.

- *Does this support our mission?*
- *Does this lean into our team's strengths and passions?*
- *Can we do this? Does it strengthen our capacity?*
- *Is there potential for funding or financial sustainability?*
- *Is it consistent with our values?*
- *Is it valued or needed by our core stakeholders?*
- *Does this build or strengthen our relationships?*
- *Does this advance our DEIA goals?*

### Step 3 – Customize each of the questions for your organization.

Your Strategy Screen should be unique. Tweak the questions until they reflect what matters most to your organization.

### Step 4 – Run your decision through the questions.

For each question, answer yes, maybe, or no as it applies to the decision you are making. *Maybe think about assigning points!*

### Step 5 – Assess the results.

Did the opportunity you're exploring pass with flying colors? Or are there a lot of "maybes?"

Even if the end result isn't crystal clear, the results will open the door to future discussion and discovery for your team.

Our organization's  
customized strategy  
questions:

Option 1

Option 2

Option 3

Yes/  
Maybe/  
No

Yes/  
Maybe/  
No

Yes/  
Maybe/  
No
