

## Why Your Strategic Plan Isn't Working Self-Diagnostic Worksheet + Fix-It Guide

✓ Use this simple worksheet to diagnose where your strategic plan might be falling short—and what you can do right now to breathe new life into it.

### 🔍 PART 1: QUICK DIAGNOSTIC — IS YOUR PLAN ALIVE OR ASLEEP?

Check all that apply:

- ☐ We have a written strategic plan.
- ☐ Our team refers to the plan regularly.
- ☐ Staff and board were meaningfully involved in shaping it.
- ☐ We use the plan to guide decisions, priorities, and resource allocations.
- ☐ There are clear metrics or benchmarks attached to each goal.
- ☐ We review progress at least quarterly.
- ☐ It's easy to understand and connects directly to our day-to-day work.
- ☐ Our partners and community can see themselves in the plan.
- ☐ We've adapted the plan at least once based on shifting realities.

● Score Yourself:

7–9 boxes checked – You've got a living strategy. Time to tune-up, not reboot.

4–6 boxes – Your plan has potential, but it's not driving action.

0–3 boxes – You've got a beautiful binder (or an urgent need to build one).

### ⚠️ PART 2: COMMON STRATEGIC PLAN PITFALLS — WHICH SOUND FAMILIAR?

Check all that apply:

- ☐ We created the plan with limited input from frontline staff, clients, or community.
- ☐ Our plan is mostly a list of goals without clear timelines or responsibilities.
- ☐ No one “owns” the plan or ensures it's followed.
- ☐ We got stuck trying to be too comprehensive or perfect.
- ☐ We haven't looked at the plan since the board approved it.
- ☐ Staff don't see how their roles connect to the goals.
- ☐ We avoid naming trade-offs, so everything is a priority.
- ☐ We never revisit or update the plan as things shift.

👉 Circle your top 2 traps. These are your starting points for change

## PART 3: FIX IT — 5 SIMPLE MOVES TO BRING YOUR PLAN TO LIFE

### **Name Your “North Star.”**

Make sure everyone can articulate the long-term change you're working toward—and why it matters. Keep it short, bold, and community-rooted.

### **Assign Clear Ownership.**

Every strategy should have at least one person accountable for moving it forward—with the authority and support to do so.

### **Build in Check-Ins.**

Set lightweight monthly or quarterly strategy reviews (15–30 minutes!) to revisit goals, name blockers, and course correct.

### **Make it Visual + Shareable.**

Turn your strategy into a one-pager or dashboard that's accessible—something staff can see, not just store.

### **Involve Your People.**

Regularly bring in staff, clients, and community to reflect on what's working, what's not, and what's needed next.

### **REFLECTION: WHAT'S YOUR NEXT RIGHT MOVE?**

- What's one thing we can do this month to reconnect with our strategy?
- Who can champion that step?
- What support or permission do they need?

### **BONUS TIP:**

Don't wait for a 3-year refresh. Strategic plans should evolve. Treat it like a living document, not a fixed artifact.

### **NOTES FOR NEXT STEPS:**