

RESOURCING & STRATEGY CHECK

This worksheet is a decision-making tool to help leaders clarify whether or not a new idea aligns with your organization's strategy and available resources.

1. Strategic Fit

Purpose: Keeps your team focused on the bigger picture.

Which of our strategic priorities does this idea support?

Priority 1: _____

Priority 2: _____

Priority 3: _____

Quick Tip!

If you can't confidently fill in at least one strategic priority, this idea may belong on the "parking lot" list for future review.

Is this idea consistent with our mission, vision, and values?

- Yes, strongly aligned
- Somewhat aligned
- No, not aligned

Does it move us toward a *current* organizational goal?

- Immediate goal
- Future goal
- No

2. Resource Capacity

Purpose: Avoid overcommitting people, time, and money.

Do we have enough staff time to do this without pulling focus from other priorities?

- Yes, fully
- Yes, but with trade-offs
- No

Do we have the budget to do it well?

- Yes
- Yes, if we adjust another area
- No

Do we have the expertise we need internally, or would we need external support?

- Covered internally
- Would require external support
- Combination of the two

Does the team have the energy and bandwidth to take this on without risking burnout?

- Yes
- Maybe
- No

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3. Timing & Opportunity Cost

Purpose: Ensure “yes” means something intentional, not an accidental “no” to other work.

Is this idea time-sensitive? (e.g., funding window, partnership opportunity)

- Yes, urgent
- Somewhat time-bound
- No

What current work would need to pause, delay, or shrink if we pursue this?

Would saying yes to this idea create measurable value greater than what we’re currently doing?

- Yes, higher ROI
- No, about equal
- No, lower ROI

4. Decision Summary

Based on what you learned through this process, how would you like to proceed?

- Yes, let’s proceed
- No, not a fit
- Not now, revisit later

Notes/Next Steps:
