

# Strategic Plan Health Check

A self-assessment for nonprofit leaders — is your current plan still working for you?

## How to use this tool

Answer each question honestly — based on how things actually are, not how you wish they were. Count your "No" answers at the end. 0–2 Nos: your plan is in good shape. 3–5 Nos: a tune-up is probably due. 6 or more Nos: it may be time for a full refresh or a new process.

## SECTION 1 - RELEVANCE AND CURRENCY

#	Question	Yes	No
1	Has your organization's external environment changed significantly since the plan was written? (new funding landscape, policy changes, community shifts)		
2	Have major internal changes occurred — leadership transitions, staff turnover, budget changes — that the plan doesn't reflect?		
3	Are the priority areas in your plan still the right ones? Or have new urgencies emerged?		

## SECTION 2 - OWNERSHIP & ALIGNMENT

#	Question	Yes	No
4	Do your staff know what the strategic plan says — and can they connect their work to it?		
5	Does your board reference the plan when making decisions, or does it sit on a shelf between reporting periods?		
6	Did the people who need to implement the plan help shape it? Or was it handed down to them?		

## SECTION 3 - IMPLEMENTATION & PROGRESS

#	Question	Yes	No
7	Are you measuring what the plan said you would? Do you have the data to know whether you're on track?		
8	Has meaningful progress been made on your top strategic priorities in the past 12 months?		
9	When priorities have stalled, has your organization had a structured conversation about why — and what to do differently?		

## SECTION 4 - VITALITY & FUTURE READINESS

#	Question	Yes	No
10	Does your plan reflect honest assessment of your organization's strengths and limitations – or is it aspirational to the point of being unrealistic?		
11	Are the financial projections in your plan still credible given what you know now?		
12	If you had to present this plan to a major funder or new board member today, would you feel confident standing behind it?		

### Scoring

#### 0-2 Nos

Plan is in good shape. Stay the course and keep tracking.

#### 3-5 Nos

Tune-up likely due. Consider a mid-cycle review.

#### 6+ Nos

Time for a refresh or a new planning process.

#### My "No" Count

\_\_\_\_\_ /12  
Date Assessed

### What to do with your results

If this assessment surfaced more questions than answers, that's a good sign – it means you're asking the right ones. A strategic plan that isn't working isn't a failure; it's an invitation to do the work differently. The most effective planning processes are built around the real questions your organization is living with, not the ones you think you should be asking.

### Ready to take the next step?

Book a free 30-minute discovery call at [www.spiegelconsulting.com](http://www.spiegelconsulting.com) – or reach Noah directly at [noah@spiegelconsulting.com](mailto:noah@spiegelconsulting.com) or 615-997-0944.