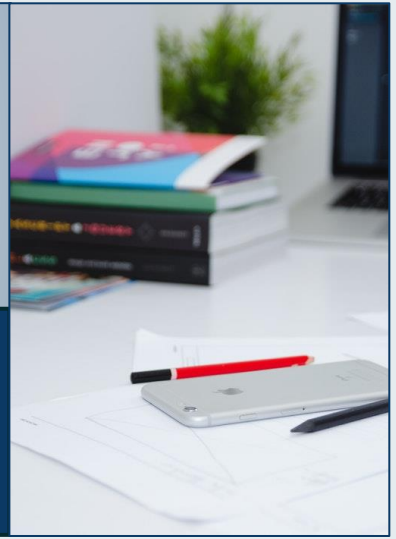


# JLK Strategies

## Strategic Planning for Non Profits

When it comes time to assess your non-profit organization's strategic plan, use this convenient checklist to guide the process and help decide what actions to take.



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### ARE KEY STAKEHOLDERS FAMILIAR WITH ALL ASPECTS OF YOUR STRATEGIC PLAN?

**YES**                       **NO**

- Distribute the plan to your leadership team for review.
- Meet with your leadership team for feedback on the plan.
- Develop talking points for your leadership team to use when communicating the plan with their teams.
- Establish regularly scheduled times to review the plan, especially those strategies that are cross-disciplinary.

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### IS YOUR STRATEGIC PLAN IMPROVING YOUR SUCCESS WITH MEETING THE DEMANDS OF YOUR MISSION?

**YES**                       **NO**

- Review your outcome metrics to ensure they are reliable indicators for your goals.
- Establish a team of Subject Matter Experts to evaluate your strategies.
- As a last resort only, revise goals and strategies that are found to be ineffective or not relevant.

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### IS YOUR STRATEGIC PLAN EFFECTIVELY ADDRESSING YOUR ORGANIZATION'S GREATEST CHALLENGES?

**YES**                       **NO**

- Complete a thorough, honest SWOT Analysis.
- Evaluate each of your organization's challenges to see if they are best removed or mitigated, and take the appropriate actions.
- As a last resort only, make changes to the plan itself if needed to address the challenges effectively.

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## IS YOUR STRATEGIC PLAN HELPING YOU TO FULLY LEVERAGE YOUR STRENGTHS?

**YES**                       **NO**

- Complete a thorough, honest SWOT Analysis.
- Evaluate your strategies to ensure they are truly leveraging your strengths.
- Connect with a wide variety of team members, including line staff, to identify previously untapped strengths.

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## DOES YOUR STRATEGIC PLAN ACCOUNT FOR CURRENT AND PROJECTED CHANGES IN YOUR OPERATING ENVIRONMENT?

**YES**                       **NO**

- Review your plan at least annually and assess if it is appropriate to the demands of your current operating environment.
- Maintain close connections with similar non-profits in your operating region to learn about impending changes as early as possible.
- Establish and/or maintain legislative outreach connections to stay informed on potential changes that would impact your organization's funding, staffing, or other critical functions.

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## BASED ON THE ASSESSMENT ABOVE, THE ORGANIZATION IS TAKING THE FOLLOWING ACTIONS.

Action	Person Responsible	Target Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



Jeff Kunkel is the founder and CEO of JLK Strategies, a consulting firm specializing in strategic planning for non-profit organizations. He has an MS in Health Care Policy and Management and has worked for non-profit organizations for over thirty years and has held leadership roles in the fields of Quality Improvement, Corporate Compliance, Strategic Planning and Data Analytics, among others.

To learn more about the services that JLK Strategies offers, visit [www.JLKStrategies.com](http://www.JLKStrategies.com) or send an email to [jeffkunkel@jlkstrategies.com](mailto:jeffkunkel@jlkstrategies.com) to set up a free consultation.