**Sample Strategy Screen for Nonprofits**

**Proposed Program/Project/Partnership:**  
**Evaluated by:**

**Recommendation**:

**Analysis Details**

|  |  |
| --- | --- |
| **Mission Impact** | **Comments** |
| Demand? (Needed or asked for?) |  |
| Alignment with mission/strategic priorities? |  |
| Reinforces/expands organization’s value? |  |
| Strengthens (or opens the door for) a strategic partnership? |  |
| **Financial Impact** |  |
| Earned revenue potential? |  |
| Leveraged revenue potential? (brings in funding from a partner/foundation?) |  |
| Saves organization time/money? |  |
| Does it compete with key partners/supporters? If so, does the benefit outweigh the risk? |  |
| Opportunity cost? |  |
| Unrelated Business Income considerations? |  |
| **Operational Considerations** |  |
| Advances/uses a unique competency? |  |
| (if partnership) Mutually beneficial - both parties invested in success? |  |
| Any perception issues? |  |
| Gap in marketplace for this service? |  |
| Level of start up time/effort from staff? |  |
| Level of staff capacity to manage/steward moving forward? |  |
| Level of board investment/capacity to manage/steward moving forward? |  |
| **Accountability (Required)** |  |
| Company/partner demonstrates high standards of corporate accountability (check if licensed, key players vetted, checked online reviews/references) |  |
| Demonstrated strong customer service? |  |
| Vetted for conflict of interest? |  |
| MOU in place - legal/accounting review as needed? |  |
| Worst case scenario considered (do a "pre post mortem)? |  |
| Vetted by a trusted partner? |  |
| Consistent with organizational values & culture? |  |