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STRATEGY
TRIAGE TOOL



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Clearing the Table to Move Forward

A System Tool for Strategy Triage

There are moments when everything shifts—when a disaster hits, funding changes overnight, a crisis demands “all hands on deck,” or policy changes upend the systems we work in. In these moments, the impulse to carry on as usual can feel powerful, even as we know the ground has moved beneath us.

As leaders, we’re often caught between two pulls: the need to respond to immediate demands and the responsibility to hold steady to our long-term commitments. The temptation to avoid, overcommit, or cling to old plans or the desire to change everything now are understandable. But in times of significant change, creating space isn’t about stepping back—it’s about making room for clarity and care so we can move forward with integrity.

The Strategy Triage Tool is simple but powerful—a resource for discerning what’s needed now, what must wait, and what no longer serves the work. When assumptions are disrupted, priorities must be reexamined. What worked before may not work now.

The Strategy Triage Tool invites leaders to ask:

What is shifting? What assumptions no longer hold?

Big change rarely comes in one wave. It reverberates. It shifts again and again. This tool is meant to be used iteratively, helping you continually recalibrate as conditions unfold.

What needs to emerge, and what must we honor and let go?

I invite you to take a look at the tool and both the simple and the extended guides. Use it to pause, reflect, and prioritize. Use it to create the space your team or organization needs to navigate this moment with care, creativity, and focus.

How do we respond to the moment while holding steady to the communities, relationships, and futures we serve?

Because making room for what’s needed now is how we make room for the future we’re committed to.

Quick Guide

Strategy Triage Tool: Navigating Disruption

What Is the Strategy Triage Tool?

The Strategy Triage Tool is a system-level resource to help leaders, teams, and organizations quickly assess and prioritize their work during times of significant change or disruption. Big change—whether caused by disasters, funding or staffing shifts, programmatic crises, or sweeping policy changes—can upend assumptions and overwhelm capacity. In these moments, it's tempting to minimize the impact or try to carry on as usual or to reactively drop everything to be responsive in ways that are not necessarily strategic. This tool offers a steadying process to help you:

- Clear the table and create the space needed to think, adapt, and move forward.
- Recalibrate your priorities in response to shifting conditions while holding steady to long-term commitments.
- Stay responsive without overextending yourself or your team.
- This is not about abandoning your purpose—it's about shaping your strategy with clarity and care so you can meet the realities of now and remain accountable to the people and futures you serve.

Why Use This Tool?

- **To Respond with Focus and Integrity:** Disruption demands thoughtful discernment and decisive action—what to continue, what to pause, what needs to emerge, and what to let go?
- **To Free Up Capacity:** Creating buffers (time, energy, resources) ensures your team remains flexible, clear-headed, and ready to evolve forward.
- **To Hold Purpose Steady:** This tool helps you navigate the moment while staying anchored in your commitments and long-term purpose.

How to Use the Strategy Triage Tool

Start with a Guiding Question: Anchor yourself in a question that balances responsiveness to the moment with your long-term purpose. For example:

“How do we navigate this moment while remaining steady in our commitment to the communities we serve and the future we’re working toward?”

Step 1 Do an initial assessment of how the current context is affecting your organization:

Take stock of big shifts.

- *What has changed?*
- *What assumptions no longer hold? What feels most immediate or uncertain?*

Step 2 Sort your priorities using the Triage Framework (see the In-Depth Guide below for further detail on these categories):

- **Still relevant—continues forward:** Aligned priorities that move forward, possibly with adjustments.
- **Pause & recalibrate:** Priorities that must pause to make space for what's needed now.
- **Emerging priorities or adaptive shifts:** New or newly urgent work arising from current conditions.
- **Unknown status/approach:** Items needing more clarity, data, or time to assess.
- **Honor and let go:** Priorities that no longer fit or serve the moment.

Step 3 Pause and revisit your guiding question to ensure your decisions also reflect your accountability to the people, relationships, and futures you're working toward.

Step 4 Revisit the tool iteratively: Change comes in waves. Use the tool regularly to adapt as conditions evolve.

The Strategy Triage Tool

Guiding Question/Line of Sight:
What will it take to ____ ?

The question should be open-ended and future-focused. It should not make assumptions about who is responsible or what the solution is.

Still Relevant/Continues Forward

These priorities remain aligned with your purpose and are feasible given current conditions.

Pause & Recalibrate

These priorities are paused because they're not feasible now or space is needed for emerging priorities.

Emerging Priorities/Adaptive Shifts

These are new or newly prioritized efforts emerging in response to current conditions or opportunities.

Unknown Status/Approach

(Need more data, too much in flux to know.)

These are priorities where the way forward is unclear or in flux.

Honor & Let Go

(Not going to happen.)

These priorities no longer make sense or are unwise or impossible given current conditions.



In-Depth Guide

The Strategy Triage Tool: Prioritizing Action

Introduction

Overview

Times of significant change—whether caused by disasters, drastic funding or staffing shifts, programmatic crises, or sweeping policy and electoral changes—disrupt our work at multiple levels. In these moments, it’s tempting to “carry on” and minimize the magnitude of what’s happening or the shifts that are being unleashed, or to reactively drop everything to be responsive in ways that are not necessarily strategic. But as leaders and stewards of strategy, we are accountable for recalibrating our work in response to disruption while holding steady to our long-term commitments.

Imagine this:

- A team working on racial justice initiatives faces sweeping policy changes after an election—much like many of us scrambled to adjust after the 2016 Trump election. Their assumptions about “what’s possible” and “who their allies are” have shifted. They use the tool to identify strategies they can still push forward, name new priorities, and release work that’s no longer aligned with current realities.
- A small organization loses key funding. Instead of scrambling to do it all with less, they pause to use the tool—freeing up capacity to adapt and pursue emerging partnerships. This decision allows them to stabilize their core work while exploring new sources of support.
- A climate justice network responds to a devastating disaster. The tool helps them clear space to meet urgent community needs without losing sight of their long-term systemic goals. It allows them to prioritize immediate relief while tending to relationships that will sustain their advocacy work moving forward.

Big change demands both thoughtful discernment and measured, strategic action: What can continue? What must pause? What needs to emerge? and What must be honored and released? The Strategy Triage Tool helps you answer those questions. It provides a clear, actionable framework for navigating disruption and shock with focus, accountability, and integrity—ensuring you remain responsive to immediate conditions without losing sight of the communities, people, and futures you serve.

Why Triage?

First, let's ground my use of the term triage. Triage comes from emergency response and medical care—it means sorting and prioritizing what needs attention first to save lives and resources. In moments of significant change, I use “triage” to describe the focused, disciplined process of assessing our work, determining what must continue, what must pause, and what needs to be let go to meet the moment with clarity and impact.

Uncertain and disruptive times require organizations to increase their buffers—clearing the space and capacity needed to respond thoughtfully, flexibly, and creatively. The work of assessing, adapting, and evolving forward takes time, energy, and focus. Spend some time developing an initial estimate of how much buffer you might need: what's your starting sense of the significance of the change—how fundamental is the impact likely to be?

Keep an open mind and heart as you reflect on where you are now and what this moment is asking of you. Disruption doesn't only demand action; it also invites us to pause, step back, and look at our work with fresh eyes.

- *What's shifting? What assumptions no longer hold true?*
- *What needs to be reimaged? What else might be needed to meet this moment with care and clarity?*
- *What must be let go? Honoring what no longer fits creates space to shape what comes next.*

Loss will happen. And recognizing loss matters—the plans that won't come to fruition, the ways of working that no longer serve, and the certainty that's been shaken. Grieving these losses creates clarity and imagination for what else might be possible.

But overloaded systems, plans, and teams cannot move with intention. The Strategy Triage Tool helps you clear the table—not only to make space for urgent priorities but to allow your team or organization to stay clear-headed, flexible, and ready to evolve forward.



Using the Strategy Triage Tool

The Guiding Question:

Your Anchor and Compass

Before working the actual triage tool, root yourself in a guiding question that anchors your discernment in purpose, accountability, and forward momentum.

The guiding question should:

- Focus on navigating the moment while holding your commitments steady.
- Reflect your accountability to the people and systems you serve.
- Be future-oriented and open-ended.

For example:

- *“What would it take to navigate this moment while remaining steady in our commitment to the communities we serve and the future we’re working toward?”*
- *“What would it take to balance the commitments we’ve already made with the need to meet the moment and respond to emerging crises?”*
- *“How can we help lead in this moment given our strengths and our own internal challenges?”*

Take a moment to generate your own guiding question, using these prompts:

- *What is your long-term commitment?*
- *Who or what are you accountable to?*
- *Given your long-term commitment and your accountability, how might you be called to respond to this moment?*

Initial and Bounded Assessment

Before jumping into the tool, take stock of the big strokes—what’s shifting, what’s emerging, and what assumptions may no longer hold true. This will also help you gain a sense of how much capacity you need to free up/shift.

Ask yourself or your team:

- *What has changed? What disruptions, opportunities, or critical shifts are we facing?*
- *What assumptions no longer hold? Have expectations about timelines, capacity, funding, or relationships been upended?*
- *What feels most immediate? Are there “all hands on deck” demands requiring urgent action? How much capacity might we need to free up? Over what period?*
- *What feels most uncertain? What remains unclear or in flux?*
- *How do these shifts challenge or reaffirm our guiding question? Do we need to iterate or sharpen our guiding question?*

Caution: This is an iterative process. You’re not solving everything here—just naming the most significant shifts so you can begin prioritizing. Avoid the temptation to dive into rabbit holes.

Map and Sort Your Work Using the Strategy Triage Tool

The actual tool is very simple.

- Use your guiding question and your initial and bounded assessment as your anchors to stay steady and anchored in what matters most, ensuring alignment with immediate realities and long-term commitments.
- Generate a list of your significant organizational commitments (strategies, programs, campaigns, events, large/mid-scale operational projects, etc.).
- Work together to sort those into the categories outlined in the table—Still Relevant—Continues Forward, Emerging Priorities or Adaptive Shifts, Pause & Recalibrate, Unknown Status/Approach, and Honor and Let Go. Each category outlined in the table includes reflection questions. Use these questions to support both your sorting and refinement.
- It will likely take you several rounds to complete the tool. Don’t drive to alignment too quickly.

The Strategy Triage Tool

Guiding Question/Line of Sight:
What will it take to ____ ?

The question should be open-ended and future-focused. It should not make assumptions about who is responsible or what the solution is.

Still Relevant/Continues Forward

These priorities remain aligned with your purpose and are feasible given current conditions.

Questions to Consider:

- *What is steady here, and what needs to adapt to new realities?*
- *What relationships or resources need to be strengthened to move this forward with care?*
- *How do these priorities support our commitments to the communities, relationships, and futures named in our guiding question?*

Pause & Recalibrate

These priorities are paused because they're not feasible now or space is needed for emerging priorities.

Questions to Consider:

- *When will we revisit this priority?*
- *What are we making space for by pausing this?*
- *How might this pause allow us to return with a renewed perspective or strategy?*
- *How might we be protecting something that needs to be let go.*

Emerging Priorities/Adaptive Shifts

These are new or newly prioritized efforts emerging in response to current conditions or opportunities.

Questions to Consider:

- *What opportunities or needs are emerging that we must respond to?*
- *What's our best thinking about how to approach these emerging opportunities/needs?*
- *How can we respond to these new opportunities while staying anchored in our guiding commitments?*

Unknown Status/Approach

(Need more data, too much in flux to know.)

These are priorities where the way forward is unclear or in flux.

Questions to Consider:

- *What do we need to learn or understand to make a decision?*
- *Who or what can help us see the way forward more clearly?*

Honor & Let Go

(Not going to happen.)

These priorities no longer make sense or are unwise or impossible given current conditions.

Questions to Consider:

- *Is there another member of a coalition or network for this work somewhere else?*
- *How do we want to honor this work?*
- *How does letting go free us to focus on what matters most right now?*

Revisit Your Guiding Question

Once you've worked through the triage framework, take a moment to pause and revisit your guiding question. This step ensures your decisions reflect not only the realities of now but also your accountability to the people, relationships, and futures you're working toward.

Ask yourself or your team:

- *Do our decisions align with the commitments we named in our guiding question?*
- *Have we held space for both immediate needs and long-term purpose?*
- *What adjustments, if any, are needed to honor these commitments?*

Facilitating the strategy triage tool

Common Patterns to Watch For in the Process

Disruption often triggers patterns that can derail the process. Recognizing and interrupting them keeps you on course and loyal to the future you are shaping.

- **Avoidance:** Ignoring or delaying decisions.
 - **Interrupt it:** Ground the group. Normalize the desire to avoid and start with broad strokes: What's visible now?
- **Overcommitment:** Taking on too much and exhausting capacity.
 - **Interrupt it:** Set a triage target—e.g., "Let's free up \$X, two staff members' time, or 30% of our workload."
- **Rigidity:** Clinging to plans or assumptions that no longer fit.
 - **Interrupt it:** Ask: "What are we defending, and to what end? What becomes possible if we release this?"
- **Indecision:** Getting stuck in unknowns.
 - **Interrupt it:** Set commitments for exploring unknowns: "What do we need to learn, and by when?" Revisit regularly.



Cyclical and Iterative Use

Big change is rarely a single shock—it often comes in waves. Disruptions ripple outward, creating reverberations that trigger new shifts and uncertainties. Consider using this tool iteratively to respond to what unfolds over time. Each pass through the tool allows you to recalibrate your priorities, integrate new insights, and adapt your strategies as conditions continue to evolve. For example, a housing justice team initially pauses a tenant advocacy program to address funding gaps. Upon revisiting the tool, they identify partnerships that allow them to resume the program in a more sustainable way.

Guidance for Iterative Use:

- **Set a Rhythm:** Decide how often to revisit the tool based on the pace of change you're experiencing.
 - **Rapid disruptions:** Weekly or biweekly check-ins to stay aligned during fast-moving conditions.
 - Slower, unfolding shifts: Monthly or quarterly reflections to step back and reassess.
 - **Track What's Shifting:** Keep a record of what moves through each category (e.g., "Emerging Priorities" that later shift to "Still Relevant" or "Honor and Let Go"). Patterns over time can surface insights about your organization's capacity, resilience, and ability to adapt.
 - **Name Learning and Loss:** At each iteration, reflect on what you've learned and what has been released. Pausing to grieve losses—even small ones—creates space for clarity and imagination.
 - **Stay Grounded in Your Guiding Question:** Each time you revisit the tool, return to your guiding question. Reflect on how new shifts or priorities affect your commitments to the communities, people, and futures you serve. Use this as a compass to navigate ongoing change without losing sight of what matters most.
- Ask:**
- How have our commitments evolved as conditions have shifted?
 - What new opportunities or challenges are shaping our response to the moment?
 - How can we deepen our alignment with the communities and futures we're working toward?

Instructions for Different Contexts

The Strategy Triage Tool is flexible and can be applied across different scales of work. Here are suggestions for adapting it to your specific needs:

For Individuals

Use this tool to reflect on your own priorities or portfolio of work during a period of change.

- Set aside quiet, uninterrupted time to move through the categories.
- Write down shifts you're noticing in your assumptions, workload, and energy.
- Use the reflection prompts to discern what matters most, what can wait, and what needs to be let go.
- Revisit the tool periodically to track changes and ensure your efforts remain aligned with your purpose.

Tip: Share your process with a trusted colleague, mentor, or coach to deepen clarity and accountability.

For Teams

Facilitate collective decision-making to align on priorities during disruption.

- **Start with Grounding:** Begin with the guiding question and invite reflections on what's shifted. Normalize the emotional realities of change.
- **Sort Collectively:** Work through the tool as a group, discussing each category together. Invite differing perspectives to ensure a fuller picture.
- **Set Clear Targets:** Use triage boundaries (e.g., "We need to clear 30% of our current work") to focus the process.
- **Agree on Action Steps:** For each category, clarify what happens next, who is responsible, and when you'll revisit decisions.

Tip: Pay attention to group dynamics—watch for patterns like avoidance, rigidity, or overcommitment and then use the tips in Section 6 to address them.

Instructions for Different Contexts cont'd

For Systems and Networks

Adapt the tool to engage coalitions, networks, or partnerships navigating shared disruption.

- **Clarify Shared Commitments:** Start with a collective guiding question that centers your shared purpose and accountability. For example:

“How do we navigate this disruption while staying aligned with our commitments to the communities we collectively serve?”

- **Surface Changes Together:** Facilitate a joint assessment of what’s shifting, emerging, or uncertain across the system.
- **Map the Work:** Use the triage categories to sort shared strategies, initiatives, or efforts. Identify overlaps, gaps, and areas that require collaboration.
- **Coordinate Action:** Determine how partners will support, pause, or adapt efforts. Name decision points, learning priorities, and timelines for revisiting.

Tip: Recognize the complexity of systems-level work. Iterative use of this tool can surface patterns over time that help partners better respond to interconnected changes.

Final note

Navigating big change is hard. It asks us to hold and let go of so much. Clearing the table is a purposeful act of leadership. It creates the capacity we need to respond with care, creativity, and integrity—to evolve forward, not just react.

This is not easy work, and it’s not meant to be perfect. The Strategy Triage Tool is designed to help you clear space—not just to respond to the moment, but to see what else might be possible.

This is not a one-and-done process. Each time you come back to the tool, you’ll see something new. That’s the point. The practice of iterating helps us stay grounded in what matters, even when the ground is shifting.

I hope the Strategy Triage Tool offers you support as you pause, reflect, and choose what to carry forward, what to set down, and what to make space for.

Stay steady. Stay accountable. And keep your eyes on the future you’re shaping.

Appendix

Completed Strategy Triage Table

Suppose a coalition of housing justice organizations comes together after a sweeping policy change threatens to displace thousands of tenants. Each organization has its own priorities—advocacy for stronger tenant protections, legal support for eviction cases, and direct housing assistance—but they know a coordinated response will amplify their impact. Members discuss how the policy change has shifted the landscape for their individual and collective work. They identify gaps in tenant support and new opportunities for advocacy.

Here’s what their completed first-round triage table might look like:

<p>Guiding Question/Line of Sight: How do we navigate this policy crisis while staying aligned with our shared commitment to housing equity and tenant rights?</p>	
<p>Still Relevant/Continues Forward</p> <ul style="list-style-type: none"> • Advocacy for tenant protections • Community workshops on tenants’ rights continue, with adjustments to address policy change. • Regular coalition meetings to share updates and coordinate strategy. 	<p>Pause & Recalibrate</p> <ul style="list-style-type: none"> • Planned statewide awareness campaign paused to focus resources on immediate legal aid. • Long-term fundraising initiative paused to concentrate efforts on short-term emergency appeals.
<p>Emerging Priorities/Adaptive Shifts</p> <ul style="list-style-type: none"> • Launch a shared data collection initiative to track the policy’s impact. • Develop rapid-response legal aid fund for tenants at risk of eviction. • Create a communications campaign to counter misinformation about the new policy. 	<p>Unknown Status/Approach</p> <p>Need more data, too much in flux to know</p> <ul style="list-style-type: none"> • Legal challenge to the policy under review but depends on further research and partnerships. • Uncertainty about enforcement by regional government agencies requires ongoing monitoring.
<p>Honor & Let Go</p> <ul style="list-style-type: none"> • Smaller outreach project set aside to prioritize collective action on tenant advocacy. • Plans for a housing innovation summit shelved to focus on immediate needs. • Pilot project is paused indefinitely 	



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