

Strategy Screens

Linking Assets to Outcomes

Organizational Fiduciary Capacity

Ability to continuously assess if we are effectively and efficiently investing assets to advance community benefit and achieve our outcomes in a manner that is sustainable over time



INTENDED COMMUNITY BENEFIT

ORGANIZATIONAL DESIGN CAPACITY



Fiduciary
Capacity



TALENT CAPACITY

INFRASTRUCTURE CAPACITY



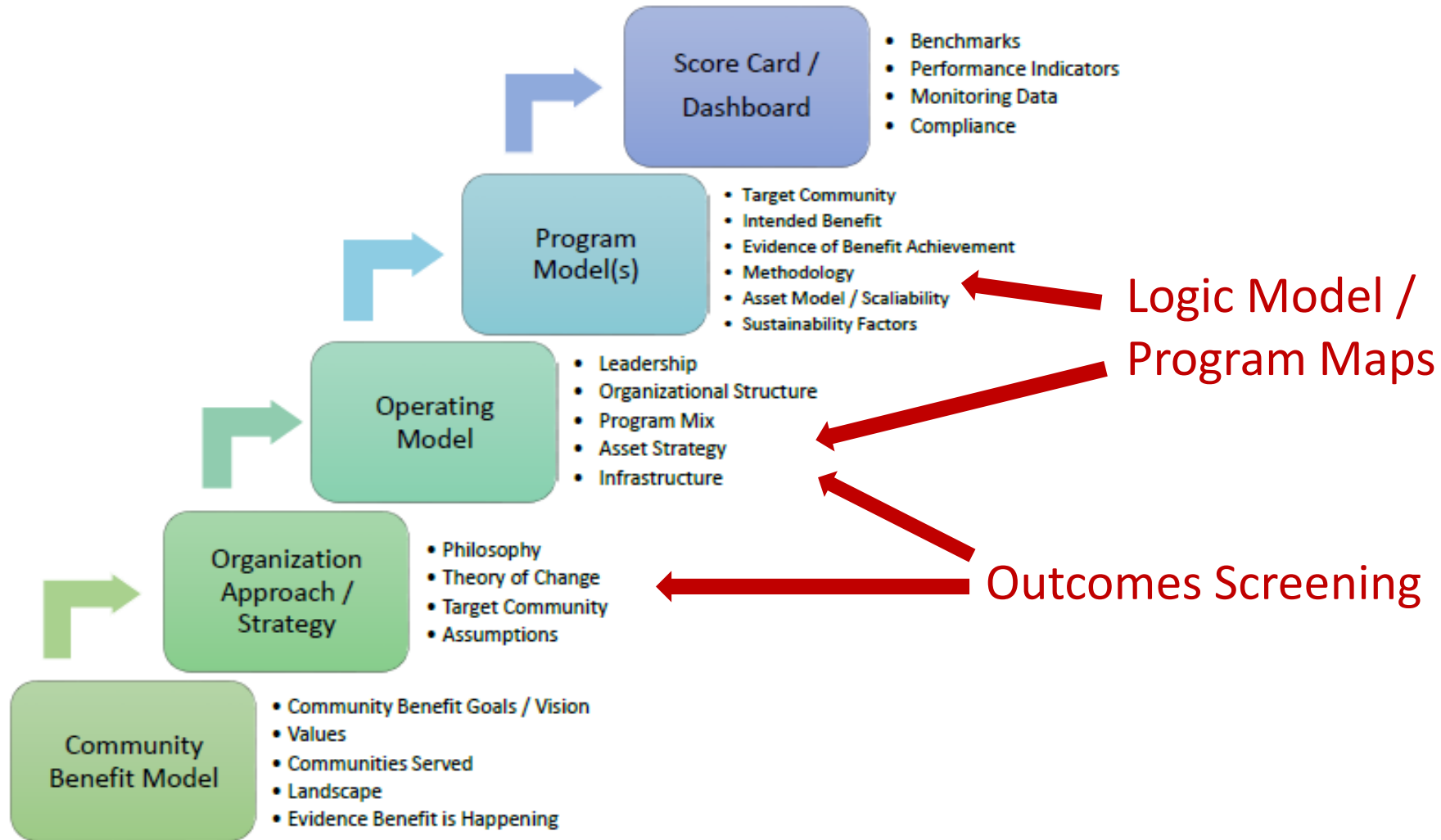
ASSET CAPACITY

Building Organizational Fiduciary Capacity

relies on...

- Articulating common goal(s) = **community benefit**
- ✓ Clarifying **approach/strategy**
- Focusing on **Ends** first AND then the **Means** that get there
- ✓ **Modeling** assets and how they are acquired and utilized
- Maintaining **an accounting infrastructure** that aligns with models
- Using **communication tools** that provide feedback on the above
- **Leadership & time** to discuss implications

Finance Requires Context



Strategy Screens – The Big Bridge

What consistent criteria does your organization apply in deciding whether to invest in, reduce, or eliminate a program/effort?



Are We Advancing What Matters

While *Missions* are important...

Outcomes are what really matter

For each effort we engage in ...

1. To what degree do we EXPECT it to advance each outcome
2. To what degree DOES it advance each outcome
3. What investment do we make in this effort

Vetting Efforts Against Outcomes

Program (Distinct Organizational Efforts)		Increased Tree Canopy	Adults invest in building and sustaining community's green space	Children invest in building and sustaining community's green space	Businesses invest in building and sustaining community's green space	Municipal policy alignment	People are actively enjoying and using canopied community spaces	Trained community members are contributing leadership
		Cmnty	Cmnty	Cmnty	Cmnty	Cmnty	Cmnty	Org
Thrive	P	N/A	2	2	2	2	2	3
	E		2	2	1	1	1	2
Prosper	P	3	1	1	3	3	N/A	2
	E	3	1	1	3	2		2
Fanfare	P	3	3	3	3	3	3	N/A
	E	3	3	3	2	2	3	
Flourish	P	3	3	3	3	1	3	N/A
	E	2	2	2	2	1	2	

Ratings

E = Effectiveness of a program in achieving/advancing a specific outcome

Low Med High

P = Priority Level – How important is achieving a particular outcome as part of a specific program/effort

Low Med High

H=Very Important (must happen);

M=Moderate Importance (will try to do);

L=Limited Importance(keep in mind);

N=Not a priority for this program/effort

Balanced Priorities

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Effectiveness Balance / Alignment

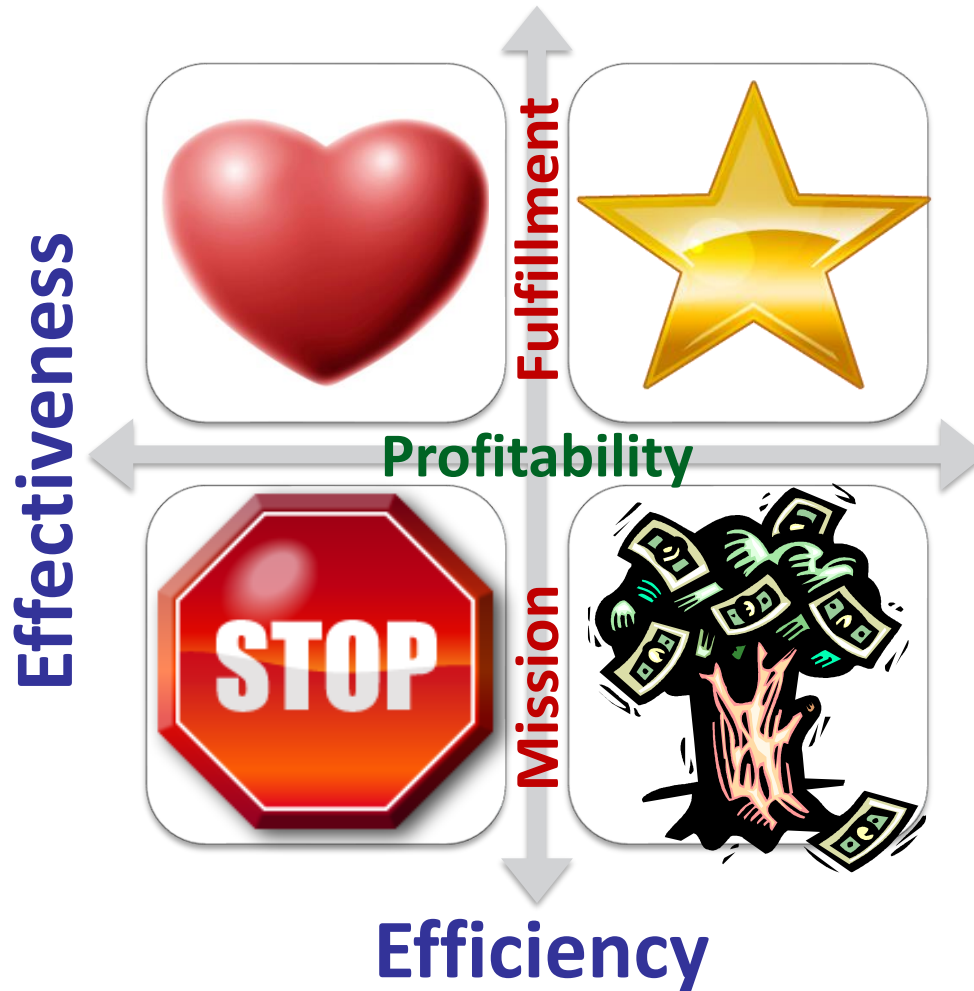
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Practice: Sleuthing Outcomes

Program Name:

- As a direct result of this program, what is different for the people involved?
- What are they able to do?
- What are they expected to feel or believe?
- What positive change is there in their quality of life?

The Matrix Map: Mission-Money Alignment



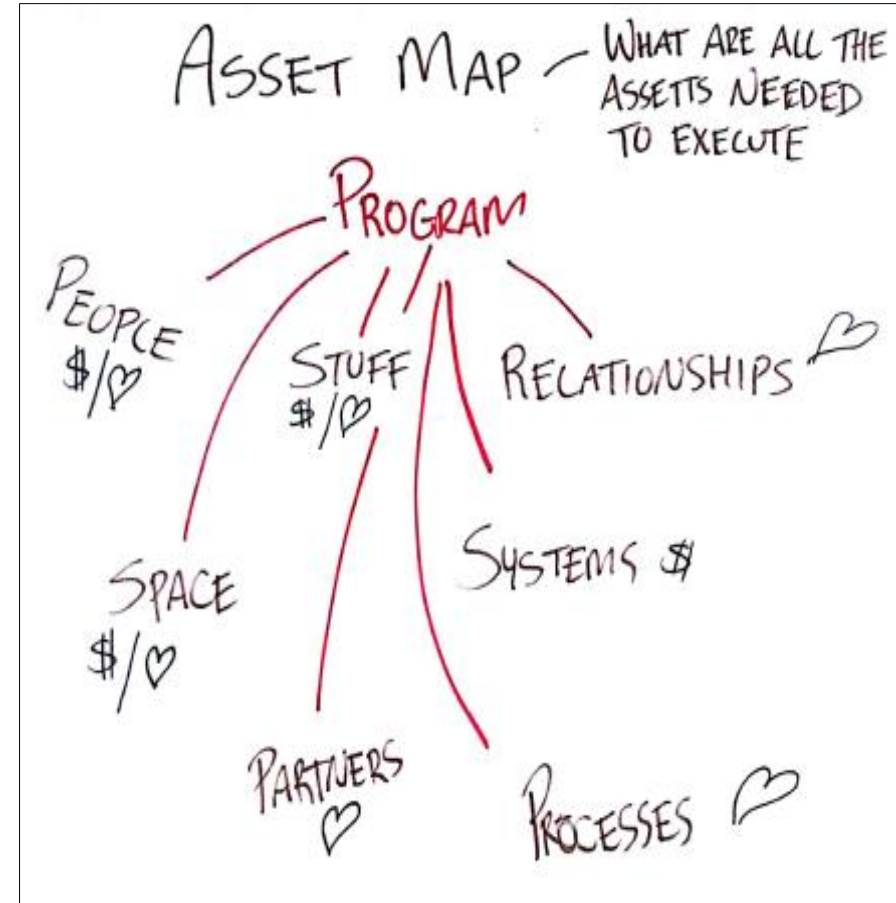
Understanding Assets – What it takes to do it

Program Outcomes / Benefits - what specific organizational outcomes will this program advance (links to organization's strategy)	
Strategy	The model / philosophy / theory that is the basis for the program's approach to creating the outcomes above (a.k.a: what will it take to create the outcomes/conditions above?)

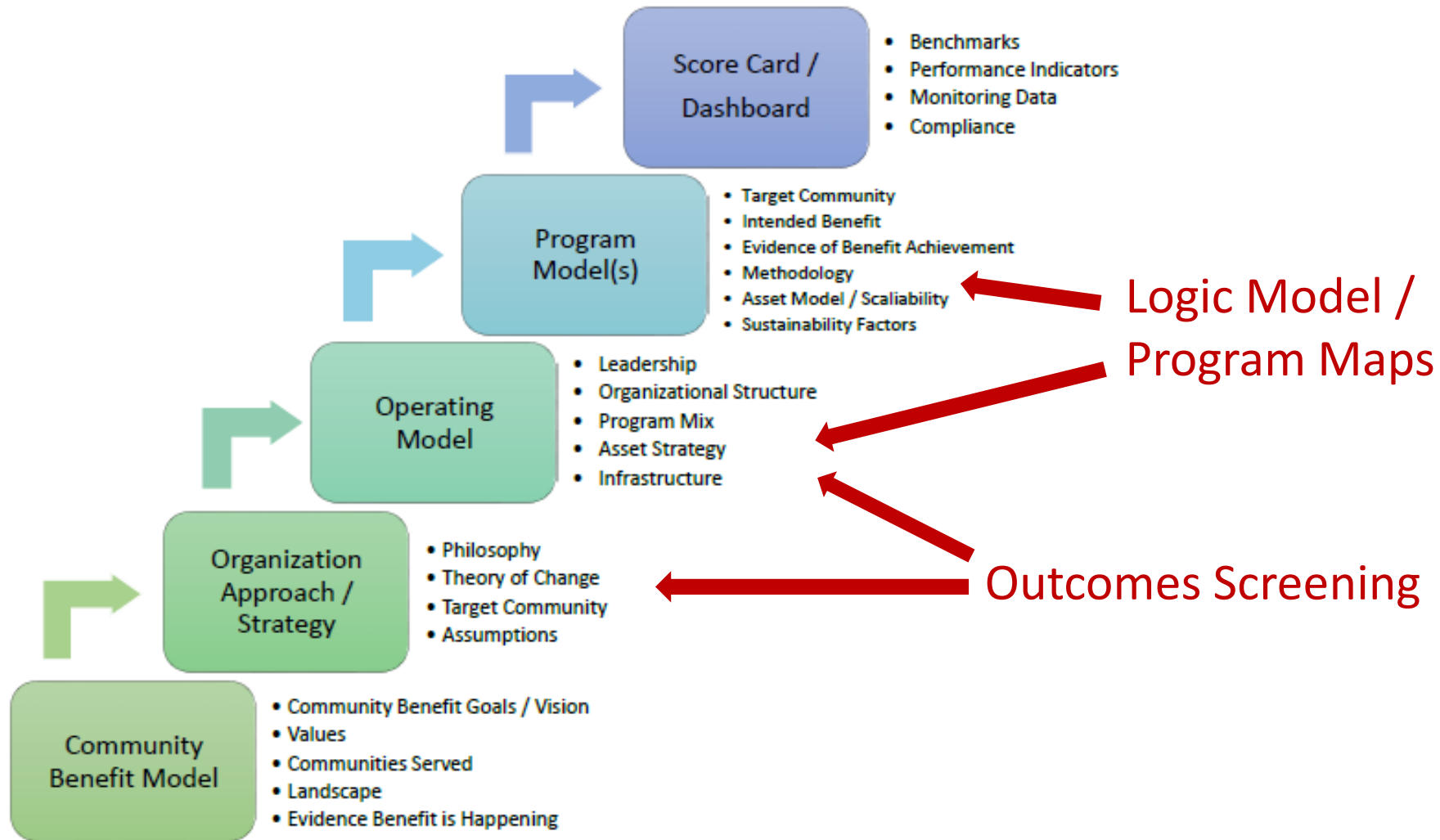
Outcomes (what will different community/individually) - External			Execution (what will be done) - Internal		Assets (Resources Required)
Long Term (Conditions Δ)	Mid Term (Actions Δ)	Short Term (Immediate Gains)	Systems & Activities (Actions)	Constituents (Entities Reached)	

Do we know:

- Which assets are financial vs non-financial
- Asset dependencies
- Assumptions behind asset development
- Assumptions behind asset utilization



Revisiting Context



Reflection

- Your Biggest Take Away or Aha

