

# The Matrix Map

Facilitating Strategic Discussions about Sustainability

# Welcome!

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“How do you know when a program is (or isn’t!) a ‘keeper’ within your organization?”

# Guiding Fiduciary Question

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Are we **effectively** and **efficiently** investing the **resources/assets** the organization acquires to strategically **advance community benefit and achieve our outcomes** in a manner that is **sustainable** over time?

# A Nonprofit Tale

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Once upon a time, in a nonprofit far, far away...



# A Nonprofit Tale

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Assuming you know that a specific program:

- Has a strong financial position
- Accomplishes its programmatic outcomes as intended

What else would it take to determine whether the program is good for the organization?

# Guiding Questions

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To what extent do we understand our program's...



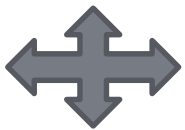
**Financial performance?**



Achievement of **outcomes** and process evaluation indicators?



Consumption of organizational **effort?**



Alignment with our **organization** and its **strategy** to achieve community benefit?



## Financial performance?

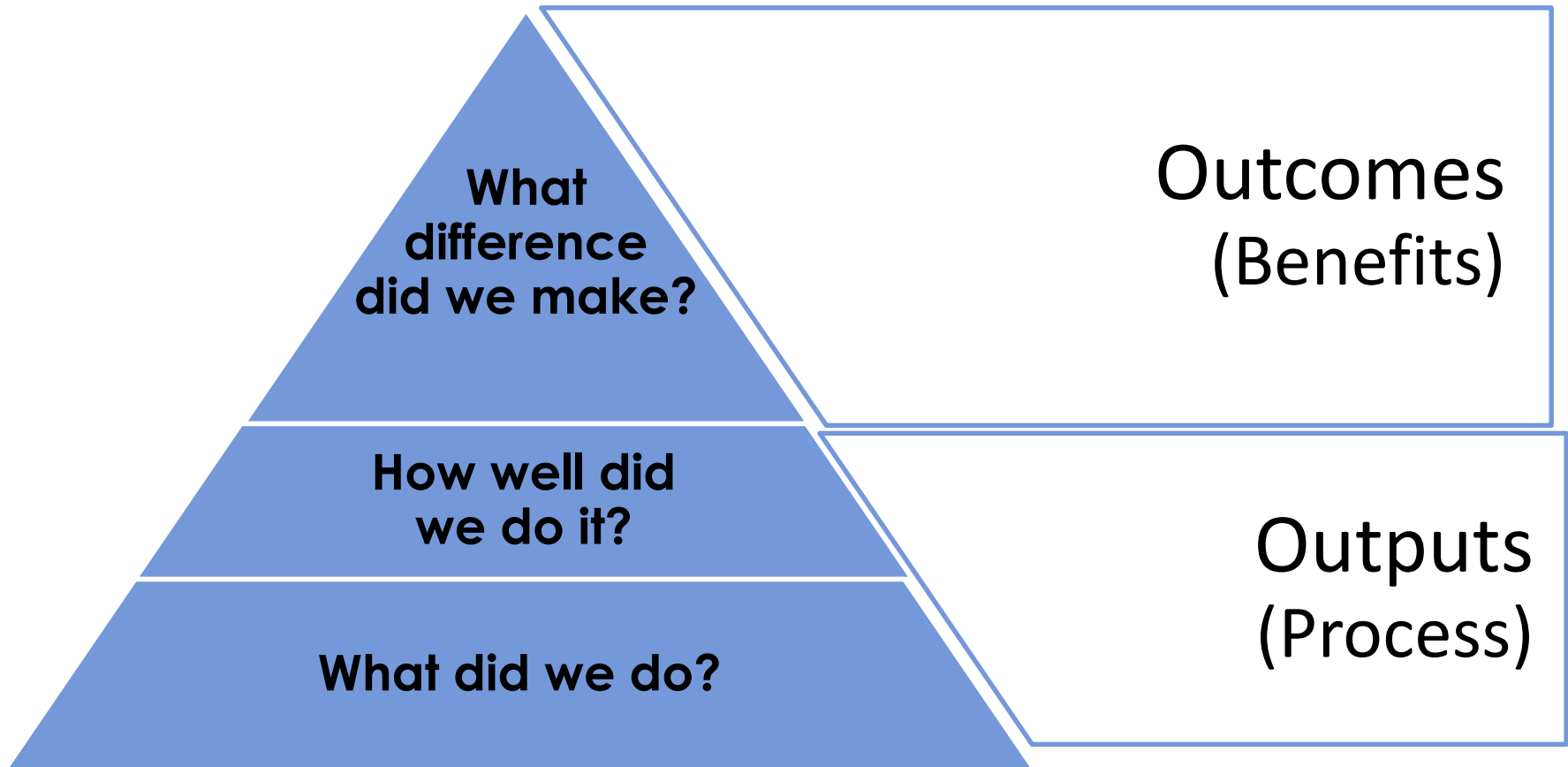
- ◀ Program level budgeting and accounting (revenue and expense)
- ◀ Accurate salary/time allocation and tracking
- ◀ Realistic shared and core cost allocation

My Great Program	
Revenue	Restricted & Earned
Program Expenses	Line Item
Salary Expense	Tracked
Allocated	Admin & Shared
True Profit/Loss	

To what extent do we understand our program's:



## Achievement of its intended outcome and process evaluation indicators?





To what extent do we understand our program's:



## Consumption of Organizational Effort?

What will help us better understand the demands of a program and what we put into it?

# To what extent do we understand our program's:

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## Alignment with our **organization** and its **strategy** to achieve community benefit?

- **Community Benefit**

The overall affect we have on the community, such as filling a gap or unmet need

- **Strategy**

Our overall theory and assumptions of what it takes to affect change, such as scale or volume, depth

- **Approach**

The way we have designed our programs and our organizational structure to maximize leverage, excellence in execution, or other criteria

- **Values**

# Your Programmatic Measurements...



Using the worksheet, consider what criteria could be used to determine ...

<b>Organizational Effort</b>	<b>Alignment w/ Organization and Strategy</b>
	<ul style="list-style-type: none"><li>• Community Benefit (overall affect we have on the community)?</li><li>• Strategy (overall theory and assumptions of what it takes to affect change)?</li><li>• Approach (the way we have designed our programs and our organizational structure)?</li><li>• Values?</li></ul>

# Guiding Questions: In Review

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To what extent do we understand our program's...



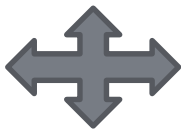
**Financial performance?**



**Consumption of organizational effort?**



**Achievement of outcomes and process evaluation indicators?**



**Alignment with our organization and its strategy to achieve community benefit?**

# Purpose of the Matrix Map Tool

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The Matrix Map is a tool intended to support an organization's fiduciaries in defining and applying **consistent criteria** to decide whether to invest in, reduce, or eliminate a program and/or organizational effort.

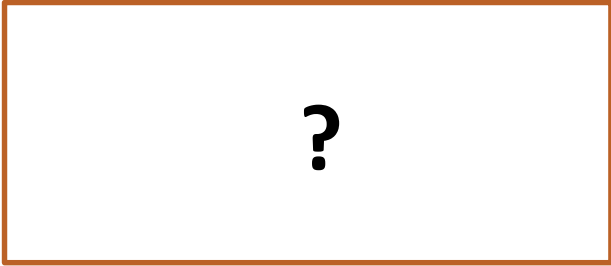




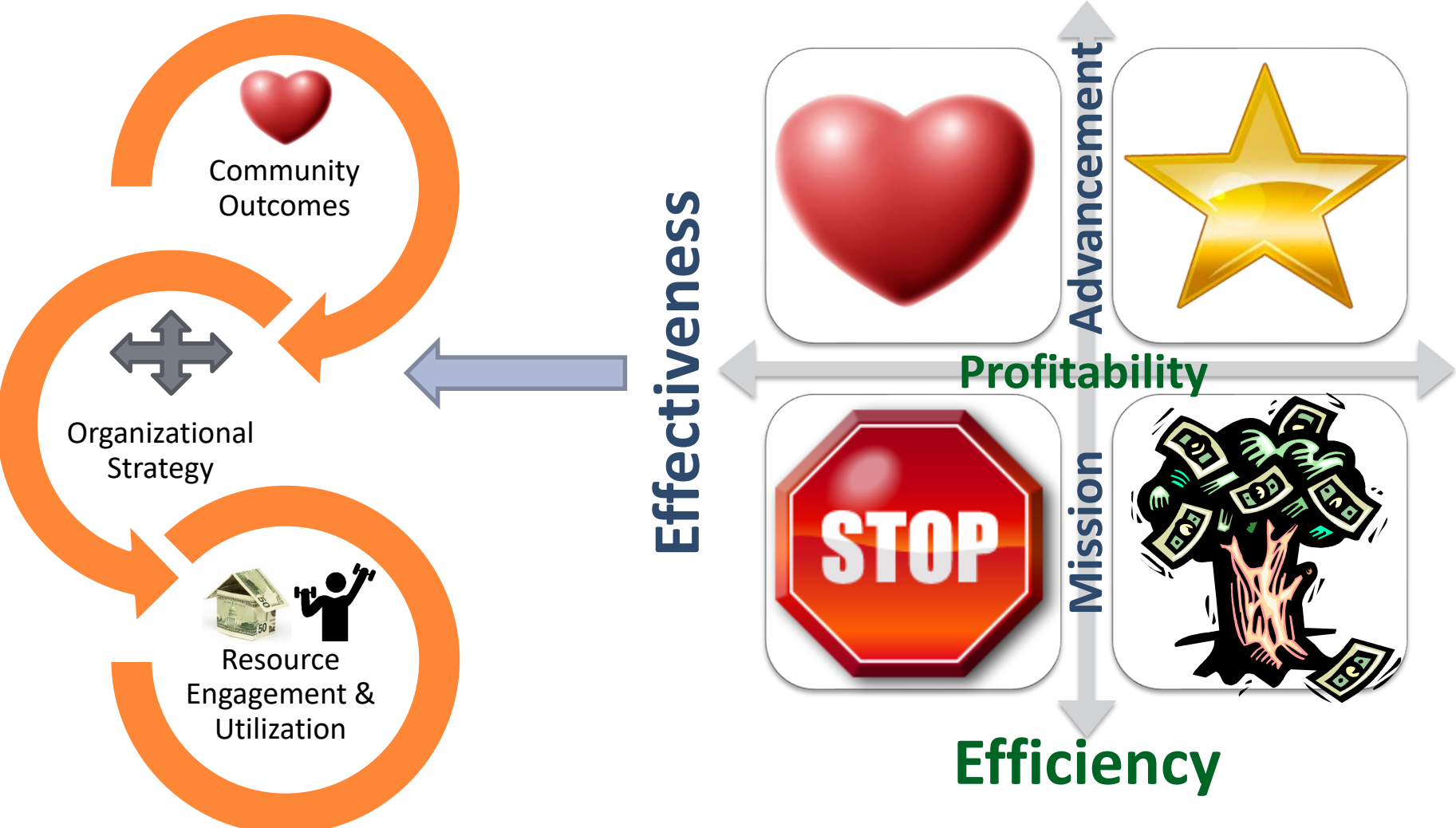
# Connecting Outcomes to Operations



Program (Distinct Organizational Efforts)		Outcome	Outcomes	Outcome	Outcome	Outcome	Outcome
<b>STRATEGY SCREEN</b>							
Program	P	3	1	2	3	3	3
	E	2			3	3	3
Program	P	2	N	N	3	2	2
	E	2			1	1	1



# Matrix Map – Sustainability Screen



Adapted from Nonprofit Sustainability; Bell, Zimmermen; 2015



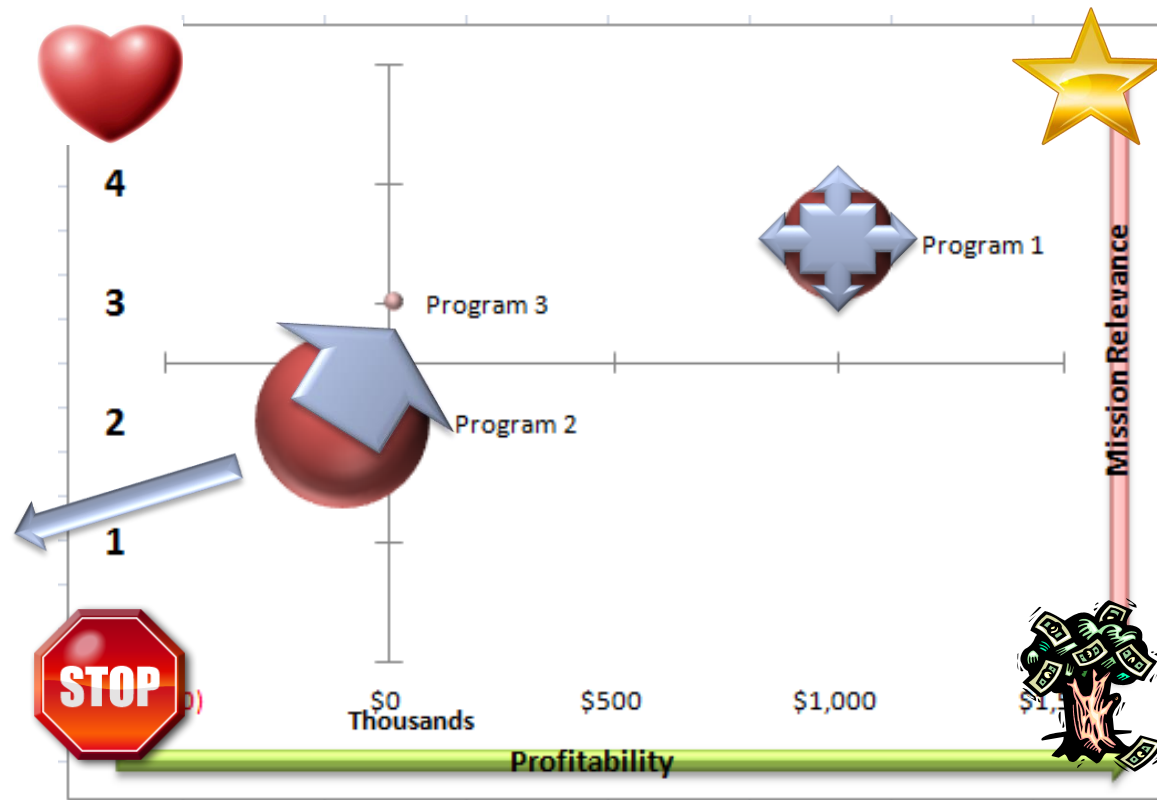
# How to Use The Results



Adapted from Nonprofit Sustainability; Bell, Zimmermen; 2015

# How to Use The Results

## The **Real** Strategic Planning



# SAMPLE Matrix Map Programmatic Measurements\*

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- ◀ **Contribution to intended community benefit (required)**
- ◀ Excellence in execution
- ◀ Scale or volume
- ◀ Depth
- ◀ Filling an important gap or unmet need
- ◀ Community building
- ◀ Leverage

\*Sustainability Mindset; Bell & Zimmerman; 2015

# Let's Build One

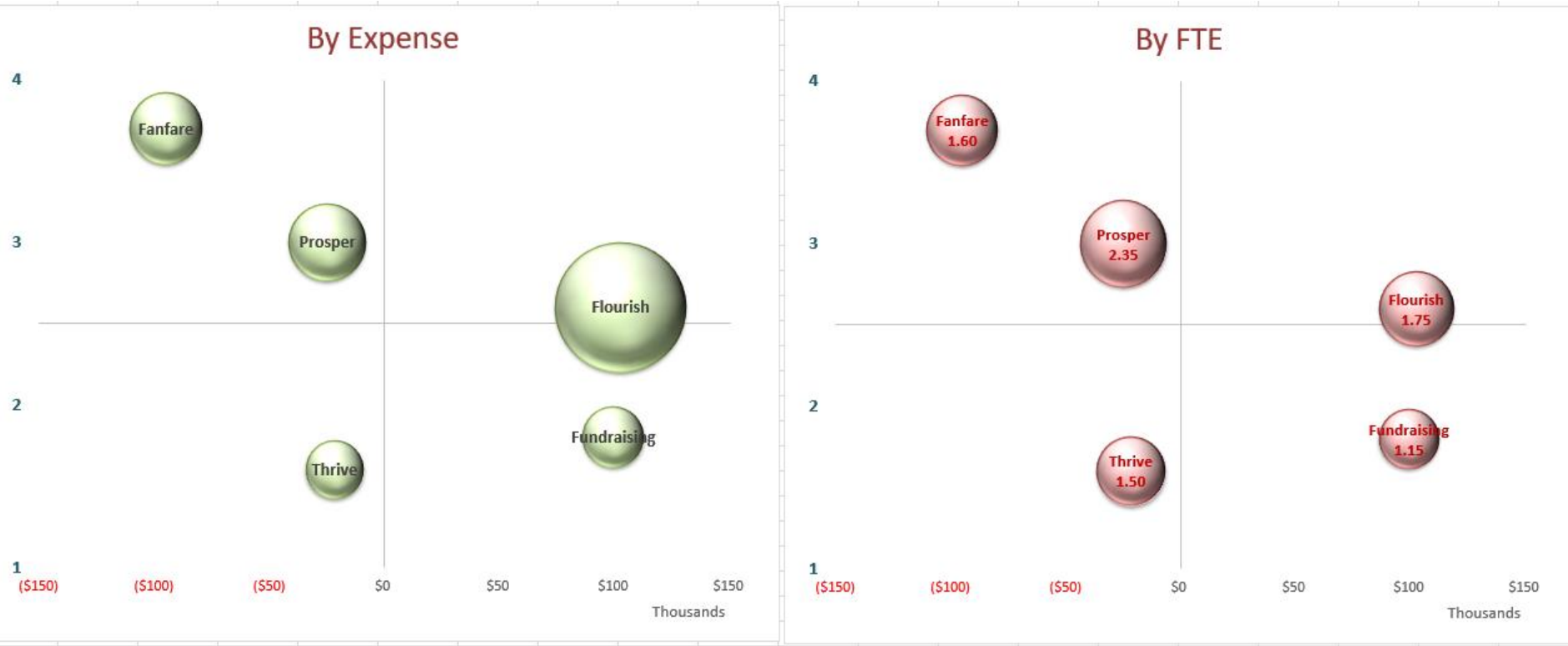
OF Rating Tool for M

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Clipboard Font Alignment Number

	A	B	C	D	E
1		<i>Rate each program on a scale of 1 (low) to 4 (high) for each of the criteria identified in the columns</i>			
			<b>Alignment with Core Mission Goals/Outcomes:</b> How much does the activity align with our core mission	<b>Excellence in Execution:</b> What level of competency do we exhibit in executing this program	<b>Scale or Volume:</b> Measures the resources served (assuming resources do not degrade) and the services provided
2		<b>Program</b>			
3		<b>Weight (%)</b>			
4		Program 1			
5		Program 2			
6		Program 3			
7		Program 4			
8		Program 5			
30					

# Root to Canopy Example



# Guiding Questions

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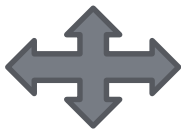
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