

The BIG Question

What would you like your financial systems and data to make possible for your organization?

What we want our Community to be

Organization's Nonnegotiable Values

Opportunities / Conditions in the Community that would make what we want a reality

Community Benefit Approach

Which specific opportunities/conditions from the above list is the organization intending to actively make possible...

Beliefs / Assumptions

What is the rationale/philosophy behind why you do it the way you do...

Specific Beneficiaries served by your community benefit approach

Direct Beneficiaries – Those who directly benefit from the work of the organization

Backers – Those who provide resources to the organization

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Conditions You Create – What specific opportunity is the organization creating for each beneficiary?

Direct Beneficiaries

Indirect Beneficiaries (Backers)

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Community Benefit Strategy

How is the organization organizing its resources to create the opportunities listed above?

Evidence of Change / Community Benefit Advancement

What is the proof that the organization’s work and approach is effectively creating the intended opportunities in the community

Simple Business Profile Statement

~3 sentences:

1. XYZ's is an organization with a revenue stream that comes from x%
(if in-kind or volunteers are significant, include them)
2. Those resources are used to deliver x, y and z ...
(include specific program and admin)
3. To be effective, we must invest in the following resources/strategies.....

Part 2

- What would we want to do differently to frame those conversations?

What’s your strategy screen?

What explicit criteria would you like to use for how to make budget decisions?

Guide to weigh choices

Is this decision...	
✓	... the best way to achieve our mission?
✓	... leveraging and/or supporting our competitive advantages? <ul style="list-style-type: none"> ▪ expertise working with immigrant families ▪ superior, unique facilities
✓	... achievable through staff and funding resources we have or can obtain?
✓	... based on a clearly defined purpose and explicit outcomes that can be measured for long-term value?
✓	... sustainable?
✓	... consistent with our role in the overall field and focused on activities for which we are best suited?
✓	... supported by our core stakeholders?

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What would make it possible to use your strategy screen as a means to test assumptions and unlock the thinking embedded in the organization?

What would a strategy screen need to include to ensure it is most relevant to NeighborWorks’ organizations and their clients?


Financial Reporting

Audiences

💡 (All) - Who is interested in your finances & why?

WHO	WHAT DO WE GIVE NOW?	WHAT FORMAT/ CONTENT CHANGES SHOULD WE MAKE	WHAT SYSTEMS NEEDS DOES THAT CREATE?
Staff?			
Management?			
Finance Committee?			
Funders?			
Public & IRS			

Communication Strategies

 (Table)

- How do you encourage financial statement literacy for your staff and use that knowledge day-to-day?

- What works for your organization in tailoring board financial statements to encourage strategic discussions and appropriate monitoring? (What's the role of the finance committee?)

- Do you currently provide a dashboard summary of key measures? How were the measures agreed upon?

- How might you restructure the board's financial statement discussions using a dashboard? How might a dashboard measure both mission and financial sustainability for your organization?

Return on Mission

☛ (Organization Team – Small Group)

- Identify one string from input to long term result in your logic model:

Target Population	Objectives/ Theory	Activity	Short Term Outcome	Long Term Outcome
Context				

- **COST EFFECTIVENESS/COST BENEFIT:** Identify one achievement of your work and how you might measure its cost comparison to other providers or to the government’s cost if the result does not happen

Outcome (Unit)	Cost of Outcome	Compared Outcome	Cost of Compared Outcome	Message:
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- **COST BENEFIT:** Identify one result from your services that provides future income (or reduction in expense/savings) for the individual served or for the community

Outcome (Unit)	Cost of Outcome over time	Monetized Benefit over time	Net Benefit in today’s \$\$\$	Message:
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Anatomy of Risk

Structural	Environmental

Sustainability Questions

What makes a Community-Benefit focused culture thrive?

What makes effective programs possible?

What would organizational efficacy look like?

What would responsible use of assets look like?

Key Financial Leaders

Role or Committee (not personal name)	How do they contribute to “Financial Leadership”
Chief Executive	
Treasurer	

