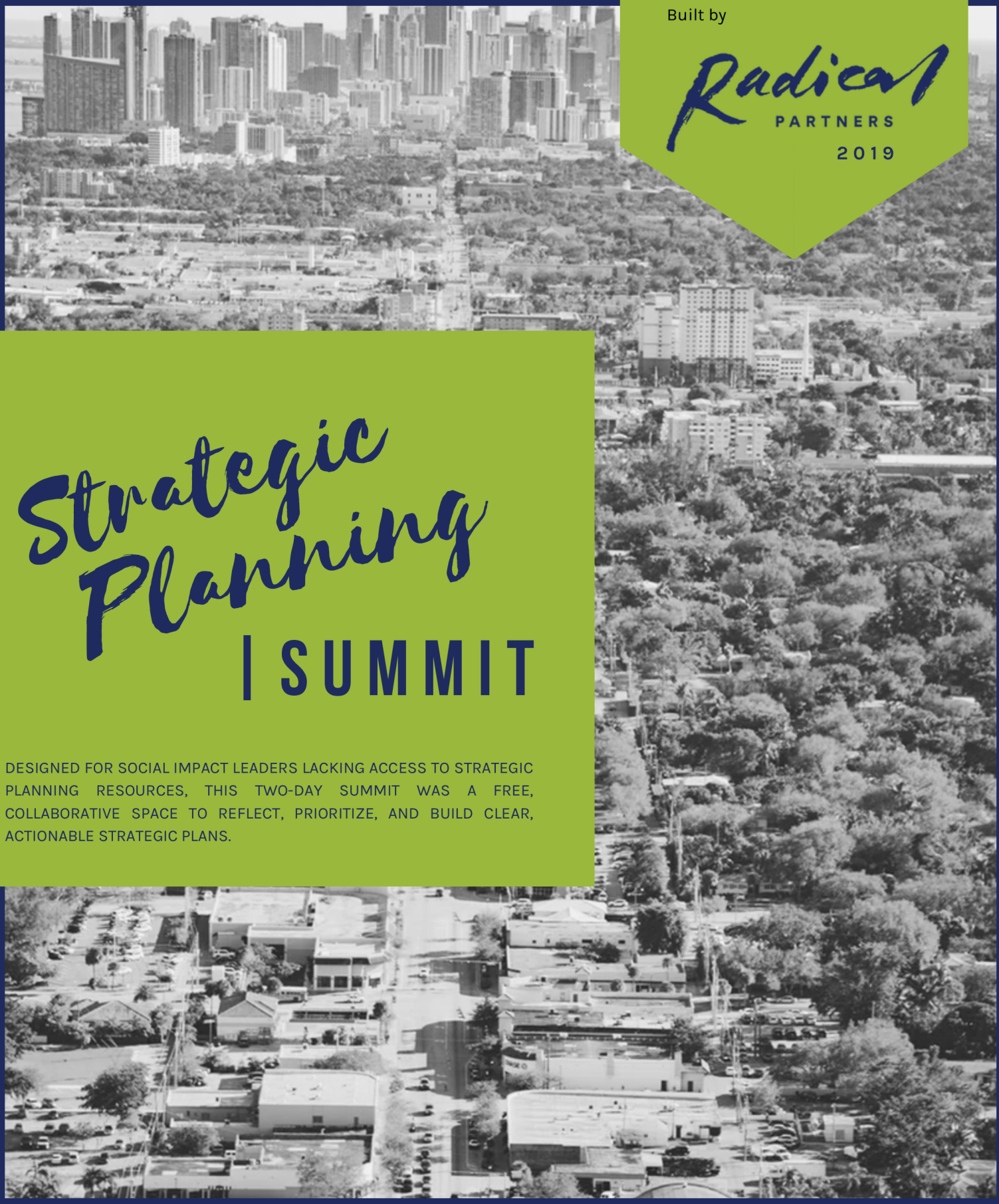


Built by Radical Partners 2019

Strategic Planning | SUMMIT

DESIGNED FOR SOCIAL IMPACT LEADERS LACKING ACCESS TO STRATEGIC PLANNING RESOURCES, THIS TWO-DAY SUMMIT WAS A FREE, COLLABORATIVE SPACE TO REFLECT, PRIORITIZE, AND BUILD CLEAR, ACTIONABLE STRATEGIC PLANS.

This was made possible thanks to the leadership and support from Citi Foundation, Knight Foundation, The Miami Foundation



Session 5 of 7
Impact and Opportunity

Go to bit.ly/TMFResourceBank to access accompanying Strategic Planning Summit Resources.

Go to bit.ly/RPOfficeHours to book Office Hours for additional guidance or support in applying these materials.

Strategic Planning | SUMMIT built by Radical Partners with support from Citi Foundation citi KNIGHT FOUNDATION THE MIAMI FOUNDATION

IMPACT AND OPPORTUNITY

Directions: List and score your programs based on the criteria outlined below.
Go to bit.ly/SPSImpactOpportunity, Tab 5A to access a digital version of this workbook and other relevant resources.

Impact and Opportunity Matrix										
Instructions: Outline all programs below and grade them from zero based on the scale for each category. You may rate in the the ".5" range if needed. The higher the score, the more true the category is to that program. Once you have a final score, scroll to the right to view the rubric and current level of impact and opportunity.										
Program	**Cost Covered 0-3**	**Have Capacity 0-3**	**Impact 0-3**	**Alignment to Mission 0-3**	**Need 0-3**	**Safe 0-1**	**Unique 0-1**	**Joyful 0-1**	**Research Based 0-1**	**Score**
Example After School Program	2	1	2	1	1	0.5	0	1	0.5	9

IMPACT AND OPPORTUNITY

PAINPOINTS

Directions: Outline each program in the space below and answer the following:

1. WHAT ABOUT THIS PROGRAM BRINGS YOU STRESS?
2. IS THIS A TIME SUCK?
3. IS THERE HEAVY RISK INVOLVED?
4. HAS THERE BEEN OR IS THERE A POTENTIAL FOR A LOT OF LOSS?
5. DOES THIS BRING WITH IT TONS OF DRAMA?

Go to bit.ly/SPSImpactOpportunity, Tab 5B to access a digital version of this workbook and other relevant resources.

IMPACT AND OPPORTUNITY

IMPACT AND OPPORTUNITY SCORE KEY

Directions: Go to bit.ly/SPSImpactOpportunity, Tab 5AX to access a digital version of this workbook and other relevant resources. Use the rubric below to help you determine the score for your organization's programs in Tab 5A.

Cost Covered			
0	1	2	3
This initiative drains $ / resources from the organization.	This initiative loses money.	This initiative doesn't break even but it comes close.	This initiative breaks even or is profitable to the organization
Capacity			
0	1	2	3
This initiative drains our team. We don't have the staff we need. Doing this project pulls time from other projects.	We don't have the staff capacity to do this initiative the way we would want to. Not easy to pull off.	A little more staff capacity would help on this project, but with a few weeks of strain we get it done.	We can comfortably do this project.
Impact			
0	1	2	3
We're not convinced that our efforts are particularly impactful.	We think we're doing some good with this project, but we know there's more we could accomplish.	We are having an impact in the areas we care about, and we have annectdotes and some basic data.	We are very proud of the impact we are having. **We have data to prove it ***
Alignment to Mission			
0	1	2	3
This initiative doesn't align to our most important priorities as an organization.	This initiative aligns pretty well with our core mission, but either isn't fully executing as intended, or is somewhat peripheral to our core purose.	This initiative solidly aligns with our mission.	This initiative is a great manifestation of our mission in action.
Need			
0	1	2	3
There is no one asking for us to do this program. It's not clear that this program addresses an area of pain or need for the community.	We have some light evidence that this program addresses a community need.	We see that the community wants this program and it solves an issue that matters to the region.	This is a pronounced and serious need for a program like this People want it, and it solves a real and importat issue.
Safe		**Unique**	
0	1	0	1
This program comes with some risks (reputation, partnership, etc)	This program has no red flags, and is safe overal for the org to execute.	There are other programs serving the same people, doing the same thing.	This program is unique.
Joyful		**Research based**	
0	1	0	1
This program is a drag, or doesn't do much for the team.	The team LOVES this project.	We have not taken the time to research best practices.	We have seen research demonstrating that this strategy is high-impact.

Session 5:
Impact and Opportunity

SESSION 5
PARKING LOT

Directions: Discuss and capture your answers below.

KEY TAKEAWAYS

1. **WHAT ARE YOUR BIGGEST TAKEAWAYS FOR THIS SESSION?**
2. **WHAT QUESTIONS WERE LEFT UNANSWERED?**
3. **IF YOU COULD RETURN TO THIS CONVERSATION IN A FEW DAYS, WHAT ELSE SHOULD BE DISCUSSED?**

Go to bit.ly/SPSImpactOpportunity to access a digital version of this workbook and other relevant resources.