

## **Sufficient Footwork Results in a Great Performance<sup>1</sup>**

submitted to the CTC VISTA Project by  
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### **Caveat**

*This tool is not a replacement for judgment or leadership. It can identify clear "winners" and clear "losers", but may be more limited at evaluating ideas that are on the borderline. The tool helps to identify ideas that need discussion and debate at the board level, but should not be blindly used to make the decision. Staff and board need to use their best judgment in applying the screening process in a non-mechanical way, recognizing that subjectivity and individual perspectives will always be part of that screening process*

*In addition, the tool has only been designed to address programs. It does not evaluate capacity needs such as staff training or IT infrastructure. Budget for these investments at a level necessary to implement the priorities selected.*

### **Tool Overview**

The tool is a measure of four criteria, each rated from 1-4 or 0-4.

- 1) Target Audience and Evidence of Need
- 2) Relevance to Mission
- 3) Impact on Financial Sustainability
- 4) Appropriateness Given Lifecycle and Strengths

### **Criteria 1: Target Audience and Evidence of Need**

#### **Q1) Sphere of Influence**

4	Impacts the organization's core constituency specifically
2	Primarily impacts stakeholders who are indirectly involved in the organization.
0	None of the above

#### **Q2) Type of people targeted**

4	Targets the organization's top priority audiences
2	Not clear if priority audiences are being targeted – more information needed
0	Serves a low priority audience

#### **Q3) Market Research**

4	Substantial, quantifiable evidence of need
3	Anecdotal evidence of substantial need
2	Small level of interest expressed
0	No evidence of need

### **Criteria 2: Relevance to Mission**

#### **Q4) Insert your organization's mission here.**

4	Highly likely to make a significant contribution to mission.
2	Likely to make modest improvements or advancements in the mission
0	Unlikely to result in improvement or advancement

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<sup>1</sup> This tool was inspired by a real tool developed and used regularly by the 8-person staff of Grantmakers for Effective Organizations.

Q5) Provides Meaningful Tools for Constituency

4	High likelihood of providing constituency with the support they need to bring about meaningful change
2	Likely to provide modest support
0	Unlikely to result in support

Q6) Evaluation/Measurability

4	Impact of activity can be measured/evaluated
3	Outputs of activity can be measured
1	Activity is extremely difficult to measure

**Criteria 3: Impact on Organization's Financial Sustainability**

Q7) Immediate Investment Required

4	Can implement with very modest investment of resources (under \$25K)
2	Sizeable amount of funding required - \$25-100K
1	Major investment – More than \$100K

Q8) Current Financial Sustainability – Impact in next 1-2 years

4	Net addition to unrestricted funds
2	Financially neutral
0	Net drain on unrestricted funds

Q9) Future Potential Earned Revenue – Impact in next 3-5 years

4	High Potential for ongoing addition to unrestricted funds
2	Financially neutral
0	Ongoing drain on unrestricted funds

Q10) Grant Support Potential

4	Grant(s) committed or highly likely (program officer assurance)
2	Good potential for obtaining grant support (interest expressed)
0	Grant support unlikely or currently unknown

**Criteria 4: Appropriateness**

Q11) Appropriateness – stage in life cycle/positioning

4	[Your organization] is the right organization to do this, right now
3	[Your organization] is the right organization, but not necessarily at this stage in its life
2	[Your organization] is one of many organizations that could potentially undertake this
0	[Your organization] is clearly not the right organization for this work

Q12) Appropriateness – existing strengths

4	Is something that [your organization] does competently or better
2	Is something that [your organization] has begun to do, but success not yet clear

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0	Is not a current strength of [your organization]
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**Question to Address in Board/Staff Discussion: Skills**  
**– Score but do not include in summary score**

4	Existing staff have the skills and experience to do this or can easily find consultants with the appropriate skills
3	Staff or consultants will require some modest training, but are expected to be capable
2	Breaking new ground – skills will need to be developed
1	Questionable as to whether this will be possible

**Sample Output**

The following spreadsheet lists the various ideas down the side, and the scores for each of 12 questions across the top. A subsequent section captures the number of highest scoring answers, and lowest scoring answers.

Idea	SCORE												Summary			Action
	Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	Total	#4s	#1s & 0s	
Idea A	4	4	4	4	4	4	4	4	4	4	4	4	48	12	0	Prioritize
Idea B	4	4	4	2	4	3	4	2	4	2	4	4	41	8	0	Prioritize
Idea C	4	4	4	2	2	3	2	2	2	2	4	4	35	5	0	Discuss
Idea F	2	2	2	2	2	4	4	2	4	2	3	2	31	3	0	Discuss
Idea E	2	2	2	4	4	3	2	2	2	2	2	2	29	2	0	Discuss
Idea I	2	2	2	2	2	3	2	2	2	2	2	2	25	0	0	Defer
Idea G	2	2	0	4	4	3	2	0	0	2	4	0	23	3	4	Discuss
Idea H	2	4	2	2	2	1	2	0	2	0	2	2	21	1	3	Defer
Idea D	3	2	3	2	0	1	0	0	2	0	2	2	17	0	4	Defer
Idea J	0	2	0	0	0	3	0	2	0	2	2	0	11	0	7	Defer

In the example above, 2 ideas scored sufficiently high enough that they should be pursued; four others should clearly be deferred. The 4 ideas in yellow may require delving more deeply about the implications of the project. Note that any idea that gets at least two scores of "4" on any of the questions will automatically be included in the "discuss" category. Additionally, any score of "4" for either Q4 or Q5 (the highlighted columns) will automatically will be included in the "discuss" category as those questions address the heart of an organization's mission.