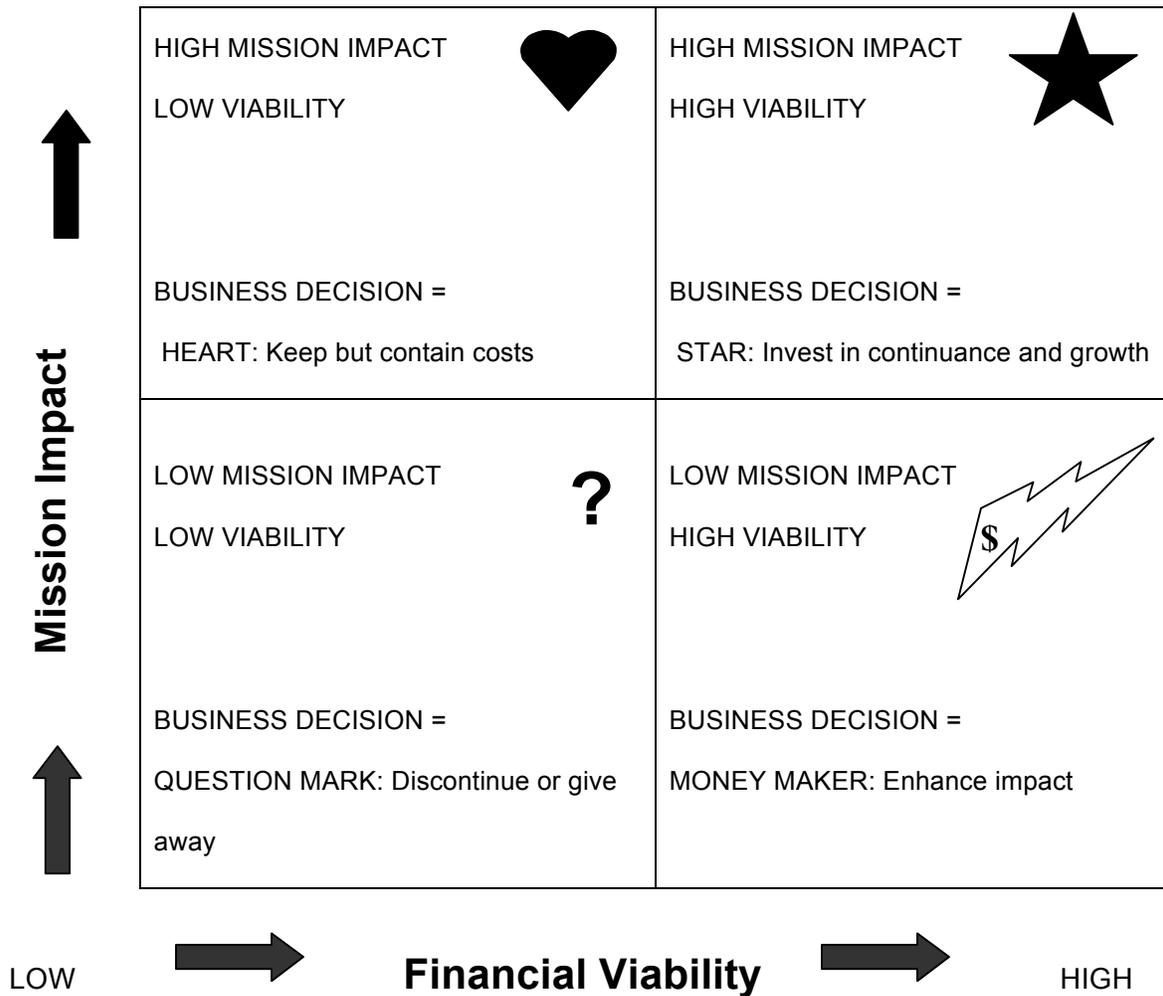


SPiN: Strategic Planning in Nonprofits

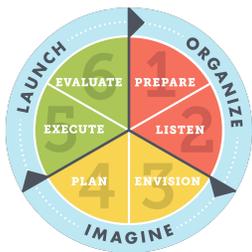
Compasspoint's Dual Bottom-Line Matrix



- Some of the characteristics of programs with *high impact mission*: tangible results; visible progress toward the achievement of the organization's mission; high leverage potential—synergy with other programs; and high-quality services that distinguish the organization from its competition
- Some of the characteristics of *high viability*: At the very least covers all costs (both direct and indirect); generates a surplus of revenue; projected to have financial sustainability for the future; a proven financially viable business model

Source: *Strategic Planning for Nonprofit Organizations*, Alison & Kaye, available from Compasspoint.org





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Compasspoint's Dual Bottom-Line Matrix

How to use Compasspoint's Dual Bottom-Line Matrix

This matrix is a useful planning and discussion tool for nonprofit organizations with multiple programs and activities. Here is a simple approach to using the matrix as a basis for discussion:

1. Discuss the matrix and the meaning of each axis. Clarify the definition of impact for your organization, and how you know if a program is having the desired mission impact. You may also wish to review or read your mission statement aloud.
2. Individually or in small groups, place a symbol on the grid to indicate where you believe each program should be placed based on its level of impact and its financial viability.
3. Discuss your ratings with the full group and attempt to reach consensus about where each program should be located on the matrix.
4. What are the implications for your portfolio of programs? Are there any programs with low impact and viability that should be discontinued? Are there some programs in other quadrants that can be improved to generate greater impact or greater revenues? What "heart programs" are you committed to continue even if greater fundraising is required?

If you are interested in a more rigorous, data-driven approach to utilizing this matrix, refer to the book *Nonprofit Sustainability* by Bell, Masaoka and Zimmerman.

