



Note: You will customize this introduction depending on how familiar this survey group is with the overall Matrix Map process.

Introduction

This survey is part of a framework, called the matrix map, to better understand and strengthen our organization's business model. In doing so, we look at how both our mission-specific and fund development programs contribute to the impact and financial viability of our organization.

This survey is designed to assess the mission impact of each of our organization's programs of the organization. Some background on the programs is provided in the Program Overview (if your organization has completed this document).

In this assessment, we assess both programmatic and fundraising activities because each activity, regardless of its primary function, has both an impact and a financial component. Put another way, our fundraising activities help accomplish our mission beyond simply raising money - they also raise awareness and understanding which is part of our mission impact.

Mission impact will be a blended score based on three criteria:

- *Summarize criteria here*
-
-

We will describe each of these criteria in more detail as we move through the survey.

As you take the survey, we ask that you utilize your individual judgment based on your perceptions and data you are familiar with. There are times when you may not feel qualified to make an assessment, but your position as a stakeholder of the organization make your perceptions particularly valuable.

Also, please think about the relative impact of the programs. While everything we do has impact, as you look at the list, ask yourself, "Which has the most impact?" or "Do all of these have the same impact?" and rate the programs appropriately.

Your honest candor is greatly appreciated and will be most helpful in moving our discussions and, ultimately, our organization forward. Thank you again for your time. If you have any questions, please feel free to contact our task force.



Conduct the Assessment

If you have elected to use an electronic survey, build it in an online tool such as Survey Monkey™ or Survey Gizmo™ and distribute it electronically to participants. Determine who will manage the survey and tally the averages for each program line. If you are using the personal reflection and group discussion method, distribute the packet of instructions and four worksheets (one for each criterion) to all participants. Set a meeting time a week to two weeks after the distribution for all participants to come together to discuss their scores. If the organization has numerous distinct programs, you may decide to schedule two group discussions to ensure that people are fresh for the totality of the dialogue.

We have facilitated very powerful group discussions in this format. A typical agenda for these meetings is included in Template 5.5 and looks like this:

- A. Review the Matrix Map Process
Where are we in the process? What comes next?
- B. Check-in On the Experience of the Personal Impact Assessment
Hear from each person on the experience of the assessment: challenges, insights?
- C. Criterion #1/Program Line #1:
 - a. Each participant has 2 minutes to share her score and reasoning.
 - b. After hearing from everyone, the facilitator reads back the scores and looks for movement or consensus if there is variance, e.g. “We have four 4s and one 2. Colleague who gave this program a 2, have you been influenced by the group, or do you wish to make another argument for your lower score?” And so on. You don’t have to come to consensus, but it is nice if you can. If not, you go with the score the majority of participants gave.
- D. Repeat #C for Entire Criterion #1.
- E. Repeat #C and #D for Criteria #2 - #4.
- F. Discuss Themes
What issues came up repeatedly? Where did we have the most agreement? Where was there divergent thinking? What do we view as 3-5 initial impact messages from our matrix map process?



Assessment Worksheet/E-Survey Page

Program #1				
Criteria # ?				
Program A:				
1 (Not at all)	2	3	4 (Very much)	Don't know
Notes:				
Program B:				
1 (Not at all)	2	3	4 (Very much)	Don't know
Notes:				
Program C:				
1 (Not at all)	2	3	4 (Very much)	Don't know
Notes:				
Program D:				
1 (Not at all)	2	3	4 (Very much)	Don't know
Notes:				
Program E:				
1 (Not at all)	2	3	4 (Very much)	Don't know
Notes:				
Program F:				
1 (Not at all)	2	3	4 (Very much)	Don't know
Notes:				
Program G:				
1 (Not at all)	2	3	4 (Very much)	Don't know
Notes:				