

Digital Dossier -Key Categories/Questions to Inform your Recommendations

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| Introduction | who is on your team and why have you chosen your focus area? How do your personal values "fit" with the work your team has undertaken? |
| Problem Identification | what is the main problem is your team trying to address? |
| <i>lens - Problem Solving</i> | |
| Clarity on <u>specific</u> problem category you are exploring | Within the main problem you've identified, what are there specific "segments" within this problem that you wish to address? What are the major challenges that have surfaced from your research? |
| <i>lens - Problem Solving</i> | |
| Mapping of the Segment | who are the main players (this can be non-profits, govt. agencies, key "customers", for profits or significant funders/individuals) in this space? Who is dominant or controlling? Where are the overlaps and disconnects? How is the voice of those who are affected/serviced/enabled or impacted expressed and listened to? |
| <i>lens - Problem Solving and Tribes</i> | Ron Gallo talked about the who, how and what of orgs - can you map these??? |
| History of focus area/events that have shaped today's environment | What events/people/legislation/trends have impacted your focus area? What should panel know about where this topic has been and where it is now? |
| <i>lens - Problem Solving and Evaluative Thinking</i> | |
| Watching the Game Films | How have agencies, funders, policy-makers and especially those being served defined success in your focus area? What are the indicators of success? What information exists in your project area to articulate the problem, players, customers, etc.? Are there seminal research projects or key data that help you form your opinions and recommendations? What are the gaps in information or data? |
| <i>lens - Evaluative Thinking</i> | |
| Who's Driving the Bus? | How do you evaluate the staff of the key agencies in this space? Where are examples of proven leadership results, smart financial management, strong fundraising and operational excellence among your key players? How do you describe the culture of the organization or field - to what extent is cooperation and collaboration practiced? |
| <i>lens - Non-profits from Inside Out</i> | |



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| <p>How does governance impact success?</p> <p><i>lens - When Boards Make a Difference</i></p> | <p>How do you rate the board leadership of the key players in your chosen space? What characteristics of board decisions, make-up, giving, governance and impact can you find to differentiate among various boards? Does the board understand its boundaries and role in relationship to staff?</p> |
| <p>Signals of Change</p> <p><i>lens - Problem Solving and Evaluative Thinking</i></p> | <p>You've set up the history of this problem area... what's happening right now? What are the signals of change - from customers, funders, the govt., other players and the market? What is having big influences on your project area and how does it impact your thinking/point of view?</p> |
| <p>Use of Stories & Data</p> <p><i>lens - Tell a Simple Story & The Art of the Ask</i></p> | <p>How do non-profit agencies in your project area tell their story? What tools do they use to make an impact on their customers, donors, community at large? How do they use data/evidence in their stories? Who's getting it right? How do you rate their communications tool kit? How do they connect with donors?</p> |
| <p>Growing Great Ambassadors</p> <p><i>lens - Great Ambassadors/Attitude of Gratitude</i></p> | <p>How do non-profit agencies build great ambassadors? Who's doing a great job in this - and why?</p> |
| <p>Predictions</p> <p><i>lens -use ALL the lenses in this section</i></p> | <p>Based on your research, interviews and deep dive in this problem area, what are your predictions for the next 5 years, 10 years, 25 years? How has this influenced your recommendations? What unexpected or unanticipated events worry you?</p> |
| <p>Specific Recommendations - How to invest \$1M in this problem area</p> | <p>This is where the rubber meets the road! Using your findings and insights from the previous sections, make clear and compelling recommendations for where the Foundation should invest \$1, and how will results be measured - it can be agencies, lobbying, infrastructure, training... whatever you think will have the most impact on this problem area. Be sure to tie your recommendations to findings you've presented earlier in the presentation.</p> |
| <p>Concluding Comments/what are the three things you want the reader to remember about this report?</p> | <p>This is a chance to wrap up your thinking and leave a lasting impression on the panel. How would you summarize the key findings, key players, trends, etc.? What advice would you give this panel for future work in your area of interest?</p> |