

IDEA SCREENING



& SELECTION



**THE LASTING
DIFFERENCE**

Sustaining nonprofit organisations, leaders & impact

IDEA SCREENING AND SELECTION

For sustainable innovation

Idea screening assessment – developing sustainably

This customisable template helps you assess new opportunities and initiatives against core purpose, values, capacity and external developments. It contains five sections (click to follow links):

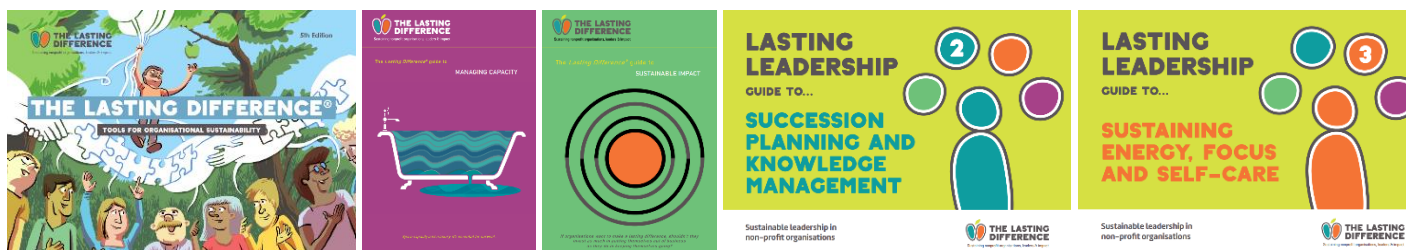
1. Outline and aims
2. Organisational purpose, values and outcomes
3. Capacity and resources
4. Policy and practice developments
5. Final assessment and next steps

Like all Lasting Difference resources, the self-assessment is designed to be used flexibly to suit your ways of working and decision-making. Use it to support your board, teams and other stakeholders when considering new developments, projects or funding opportunities.

Principles

1. Sustainable organisations are clear on what they do best.
2. The time for planning sustainability and exits is before you start.
3. Money follows good work, not the other way around.
4. Saying ‘yes’ creates more sustainability problems than ‘no’.
5. New initiatives should link to your core mission and strategy.
6. The absence of available alternatives isn’t a good rationale.

You can find out more about these and related concepts in these guides (click to download):



1. Outline and aims

Use this section to briefly describe the proposed development or project.

Name of development / project	
Overall aim of this development / project: What are the key outcomes it will achieve?	
How will it help our organisational development and sustainability?	
What is our evidence of need for this development / project?	
Where has this idea / opportunity come from? e.g. community involvement; board discussions; team suggestions; request from a partner/commissioner; unmet need.	

Reflection:

- Are we the best organisation to deliver this? Are there other organisations who might be a better fit?
- Who have we involved in the development or testing of this idea? What other perspectives might be useful?
- What are the implications if we did NOT deliver this new project?

2. Fit with organisational purpose, values and outcomes

Our organisational mission is:

Our organisational values are:

Our strategic outcomes are:

Use this self-assessment to review how the proposed idea fits against purpose, values and outcomes using this scoring guide:

2 = strong fit

1 = partial fit

0 = weak fit

Strategic fit with:	Score	Notes e.g. alignment, risks or considerations to be aware of.
Our purpose and vision		
Our organisational values		
Our strategic outcomes Outcome one: Outcome two: Outcome three:		
Our other strategies and policies e.g. Income Generation; Equality & Diversity; Wellbeing		
Existing evidence e.g. evidence of need; evaluations; external developments		
Existing work programmes and commitments e.g. services, projects, proposals in development		
Total		

3. Capacity and resources

Do we have the right resources and capacity for competent, high-quality delivery of this new idea or development? Suggestions are provided, along with space for your own ideas. Download the Guide to Managing Capacity for more.

Use this self-assessment to consider key areas of capacity and resources required.

2 = strong fit

1 = would require development and/or investment

0 = weak fit

	Score	Notes and comments
Our physical capacity and resources		
Funding, budget, reserves		
Location, premises, storage		
Equipment (e.g. IT)		
Our organisational capacity and resources		
Quality, reputation, profile		
Delivery models or approaches		
Relationships (e.g. communities, partners, funders)		
Monitoring and evaluation processes		
Our team capacity and resources		
Staffing and volunteer numbers		
Time, workloads, headspace (individual or team)		
Management capacity		
Knowledge, skill, expertise		
Opportunities to share learning and practice		
Total		

4. Fit with policy and practice developments

How well does the new initiative fit with external policy and practice developments?

This section helps to assess fit with opportunities and challenges in the external environment.

Use it to consider how this development would respond to (or advance) key areas of policy or practice development.

2 = strong fit

1 = would require development and/or investment

0 = weak fit

	Score	Notes and comments
Links with key local or national policies or strategies		
Responds to emerging evidence of need or gaps		
Contributes to sector learning and good practice		
Contributes to policy development and implementation		
Enables stakeholders to support our mission and purpose		
Develops capacity of stakeholders (e.g. communities; people who use services; partners)		
Total		

5. Final assessment and next steps

This section pulls together your assessment scores and comments to enable decisions about the next steps to be taken. You may wish to set a threshold final score which should be achieved before proceeding to the next stage.

	Final scores	Final comments and notes
Fit with our purpose, vision and outcomes		
Fit with our capacity and resources		
Fit with policy and practice developments		
TOTAL SCORE		

	Yes	No	More development required
Proceed with development of business proposal?			

Next steps:

Business proposal to be developed by	
Deadline for proposal to be shared for discussion and approval	
Decision-making and sign off by (e.g. Board/CEO/Leadership team)	
Proposed date for work to commence	