



HIGH

Internal Appropriateness

LOW

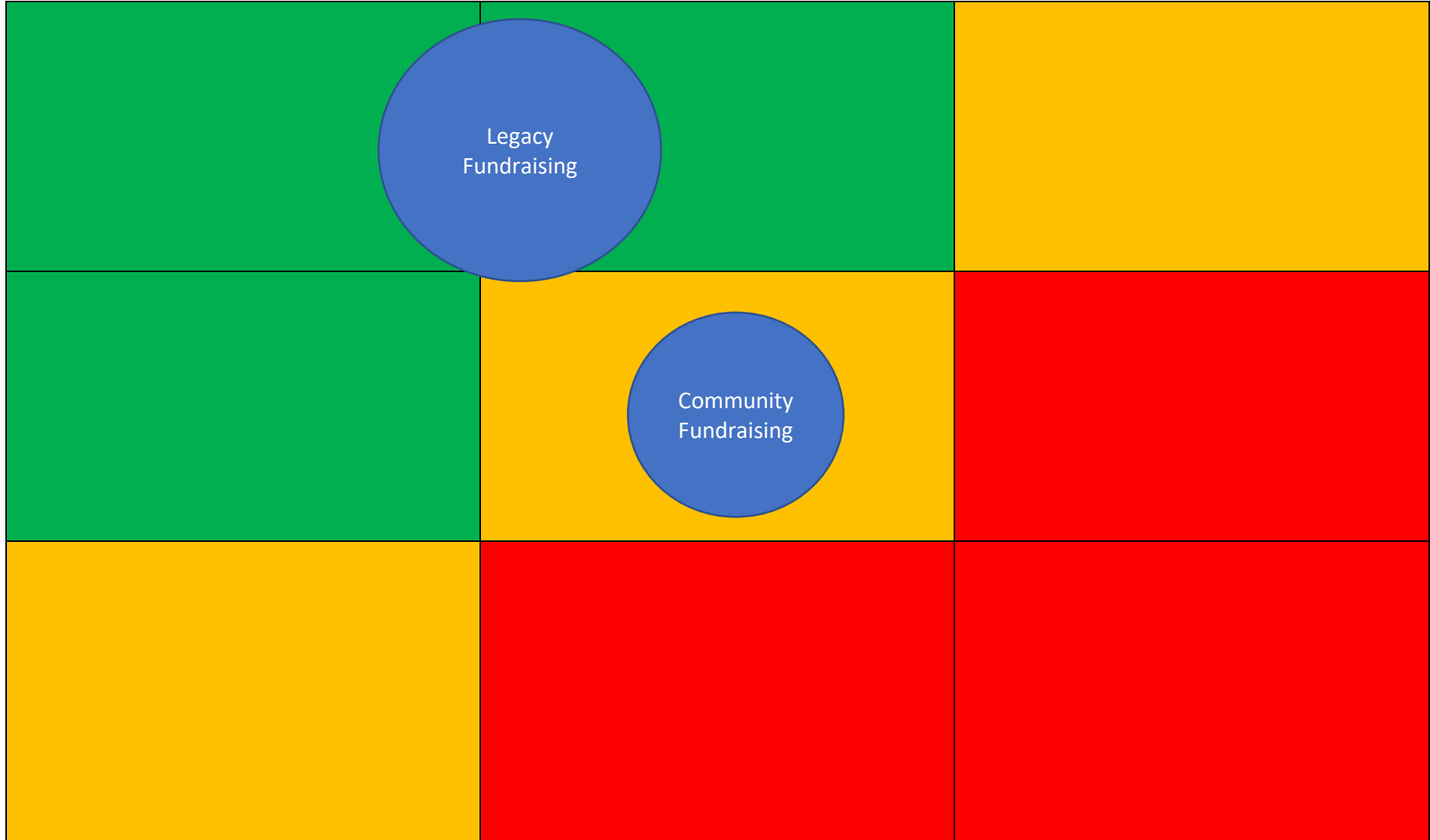
HIGH

Legacy
Fundraising

External Attractiveness

Community
Fundraising

LOW





INVEST



CLARIFY- EVALUATE AND MANAGE



MAY BE SUITABLE TO DROP/ CLOSE

How to use Portfolio Matrix

The Portfolio Matrix is a great tool to appraise the health and how ‘fit-for-purpose’ fundraising activities or proposed activities will be for your organisation, so that you can decide which ones to invest in or need to be clarified for further development. We love that you can also really tailor this Matrix to your organisation by defining and scoring the factors that you will assess the internal appropriateness and external attractiveness against.

For each fundraising activity that you are reviewing you give a weighting according to external factors- more specifically how attractive the activity would be to external audiences, this for e.g. could be how easy it is to participate or how unique the activity is. When weighting against internal factors, you are looking at how appropriate each activity is for your organisation. This could for e.g. be the financial return the activity will have; how many supporters it will recruit.

What we love about the Portfolio Matrix is that you can come up with your own external and internal weighting factors that are important to your organisation and your audience and make it very relevant and applicable. You can develop these by sending out surveys or talking to your internal and external stakeholders. We’ve included an example below of internal and external weighting factors – for each one you can decide what factors to include that are relevant to your organisation and how much to weight them according to how important they are to your organisation/ supporters (you will note that the weighting must add up to 1 in external and internal).

Activity	External/ Internal	Factors	Weighting	Rating	Value Total
Community Fundraising Events	External Attractiveness	Ease of Participation	0.3	7	2.1
		Uniqueness	0.1	3	0.3



		Suitability for participation	0.4	4	1.6
		Perceived impact on beneficiary group	0.2	6	1.2
		TOTAL	1	1-10	5.2
	Internal Appropriateness	Adequate internal resource to deliver activity	0.3	7	2.1
		Embeds appropriate messaging and values	0.2	6	1.2
		Financial return generated by activity	0.3	5	1.5
		Inclusive and accessible to all demographics	0.2	4	0.8
TOTAL		1	1-10	5.6	
Legacies	External Attractiveness	Ease of gifting	0.3	8	2.4
		Perceived impact on services/ beneficiaries	0.4	9	3.6
		Trust in organisation to deliver	0.3	8	2.4
		TOTAL	1	1-10	8.4
	Internal Appropriateness	Adequate internal resource to deliver activity	0.3	8	2.4
		Embeds appropriate messaging and values	0.2	7	1.4
		Financial return generated by activity	0.3	9	2.7
		Inclusive and accessible to all OA member demographic	0.2	5	1
		TOTAL	1	1-10	7.4

To get the totals you simply multiply the weighting factor by the rating you have given it out of 10. So for example if financial return has a weighting of 0.3 and you think there is lots of scope for generating income then you may rate this a 9, which would give this a score of $0.3 \times 9 = 2.7$. You then total up all the scores for the internal appropriateness and external attractiveness of each tactic.

Scores of 1-3 would be plotted in the reds, 4-6 in the orange and 7-10 in the green sections.