

The Sustainability Mindset

Using the Matrix Map to Strengthen Your Business Model

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Welcome!



Our Conversation Today

- ✓ Sustainability & Business Model Overview
- ✓ Visualizing the Business Model
 - ✓ Articulate Intended Impact
 - ✓ Define Programs
 - ✓ Assess Mission Impact
 - ✓ Determine Profitability
 - ✓ Plot & Analyze the Map
 - ✓ Strategic Imperatives
- ✓ Conclusion

When you hear
SUSTAINABILITY
what comes to mind?

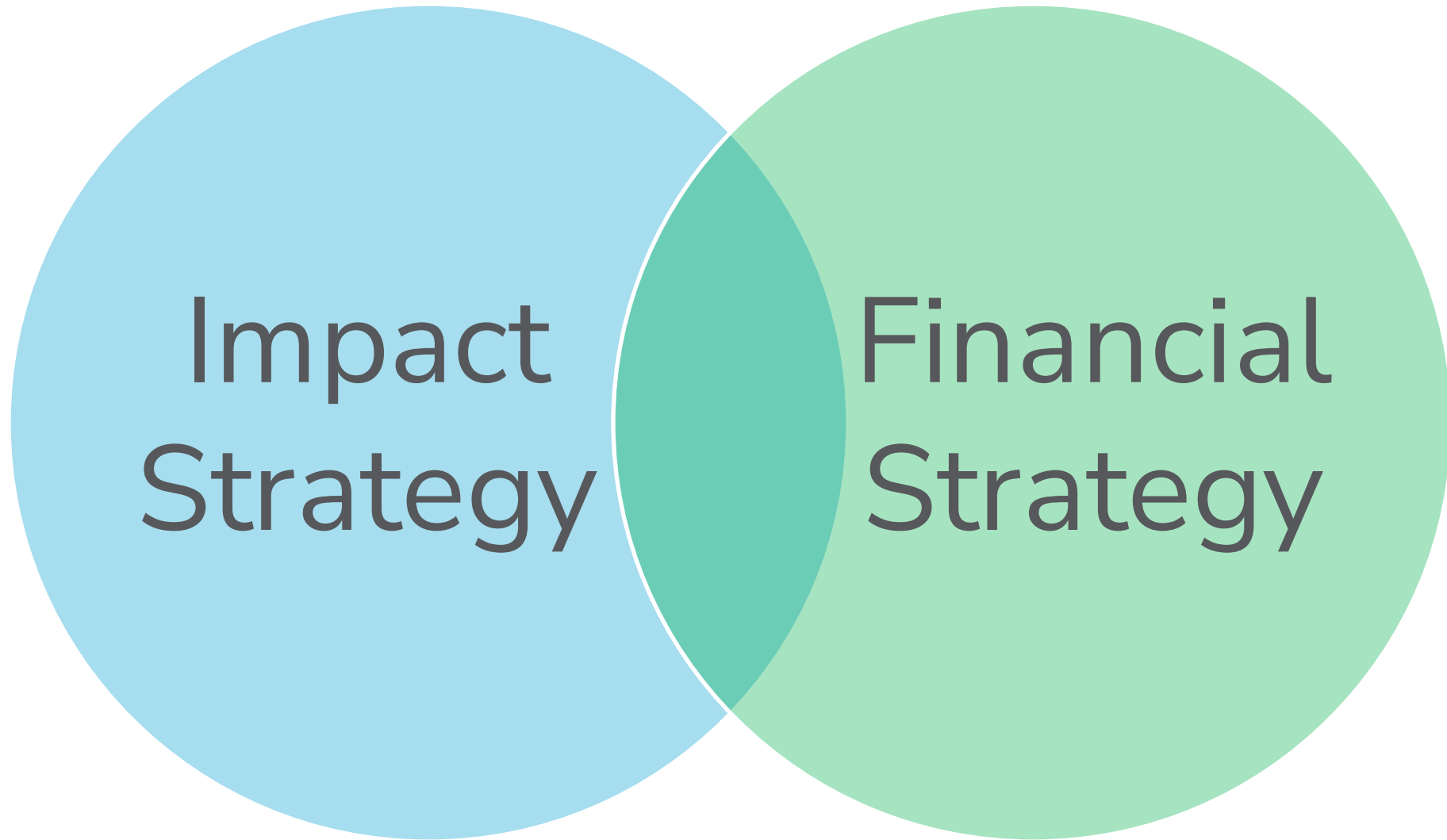


Sustainability?

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Financial Strategy



Sustainability encompasses both:

Financial Sustainability

the ability to generate resources to meet the needs of the present without compromising the future

AND

Programmatic Sustainability

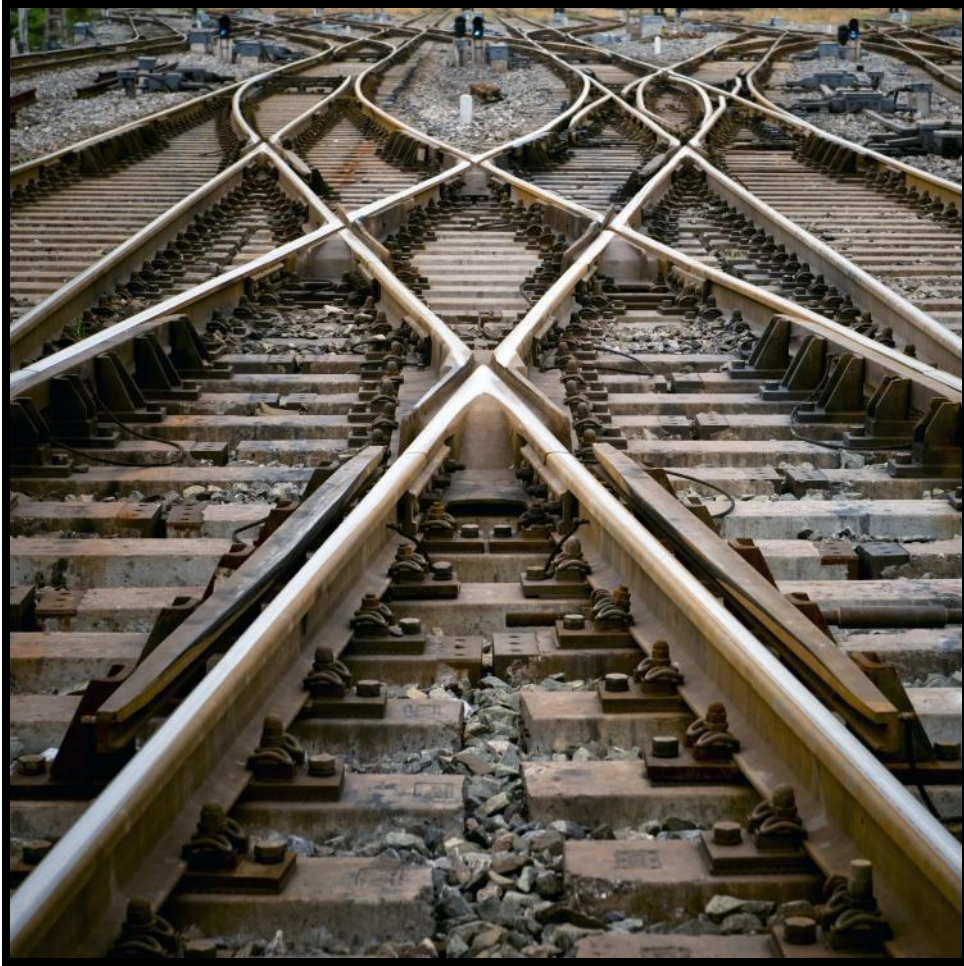
the ability to develop, mature, and cycle out programs to be responsive to constituencies over time.

- - Nonprofit Sustainability: Making Strategic Decisions for Financial Viability



SUSTAINABILITY is an orientation,
not a destination.

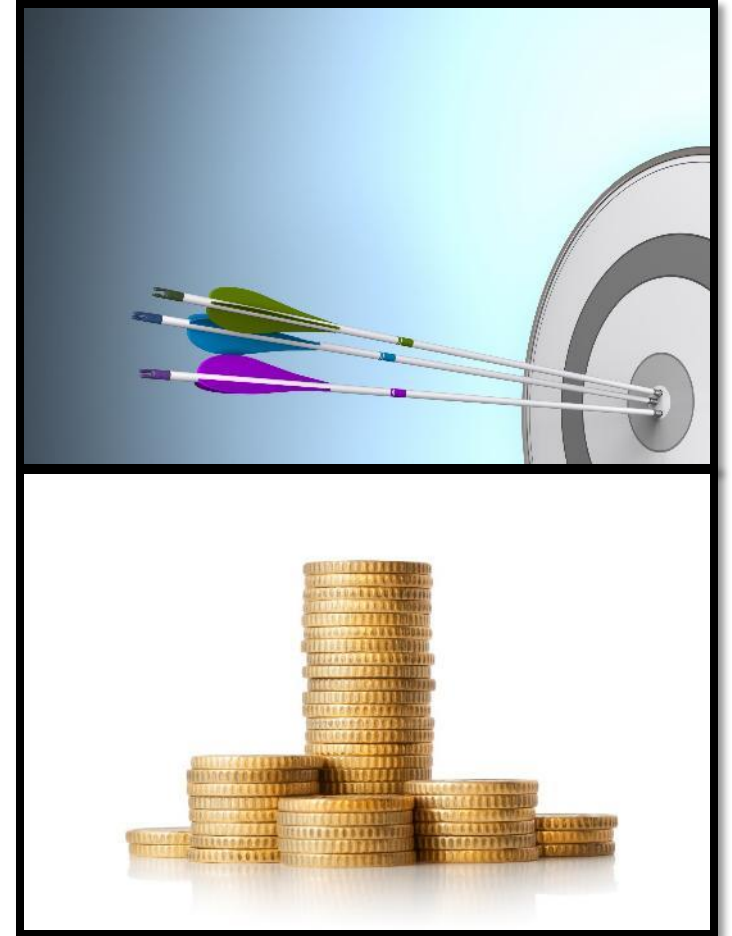




Sustainability involves ongoing decision making about your business model.

Defining Business Models

A nonprofit business model is leadership's thinking of how a set of activities work together to generate resources and achieve impact to accomplish the organization's mission.



Business Model Examples

Example 1



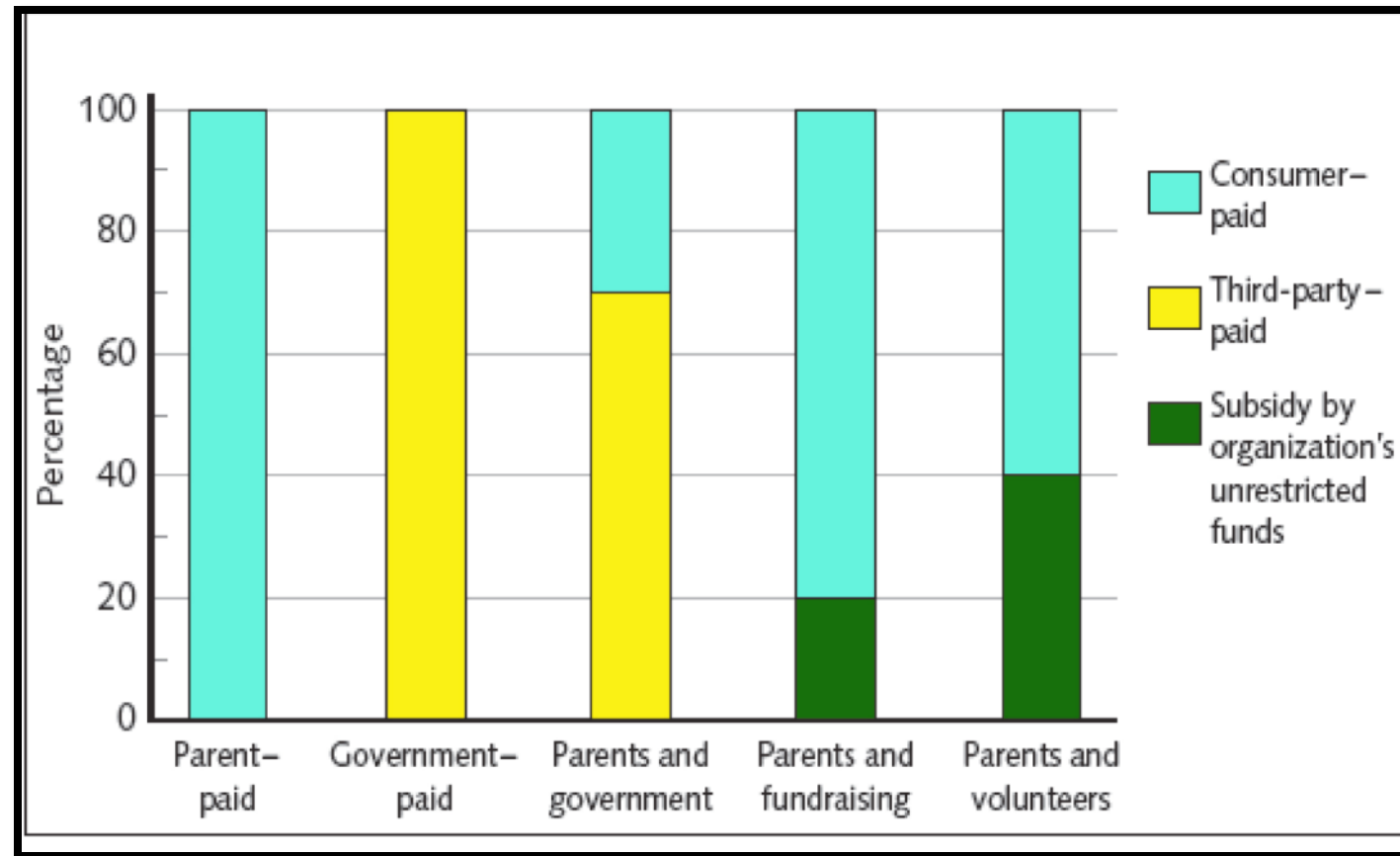
Source: www.corporate.target.com

Example 2

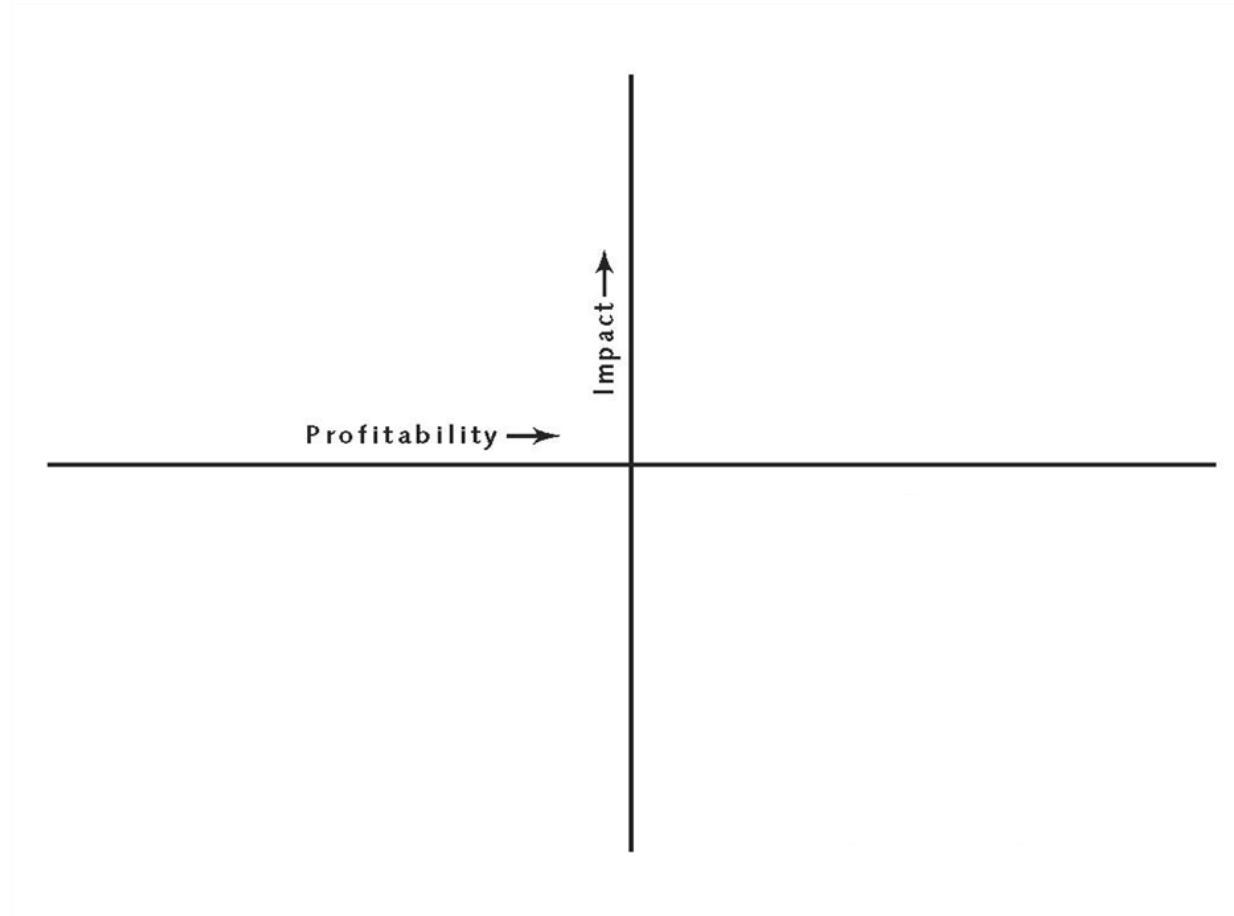


Source: www.entrepreneur.com

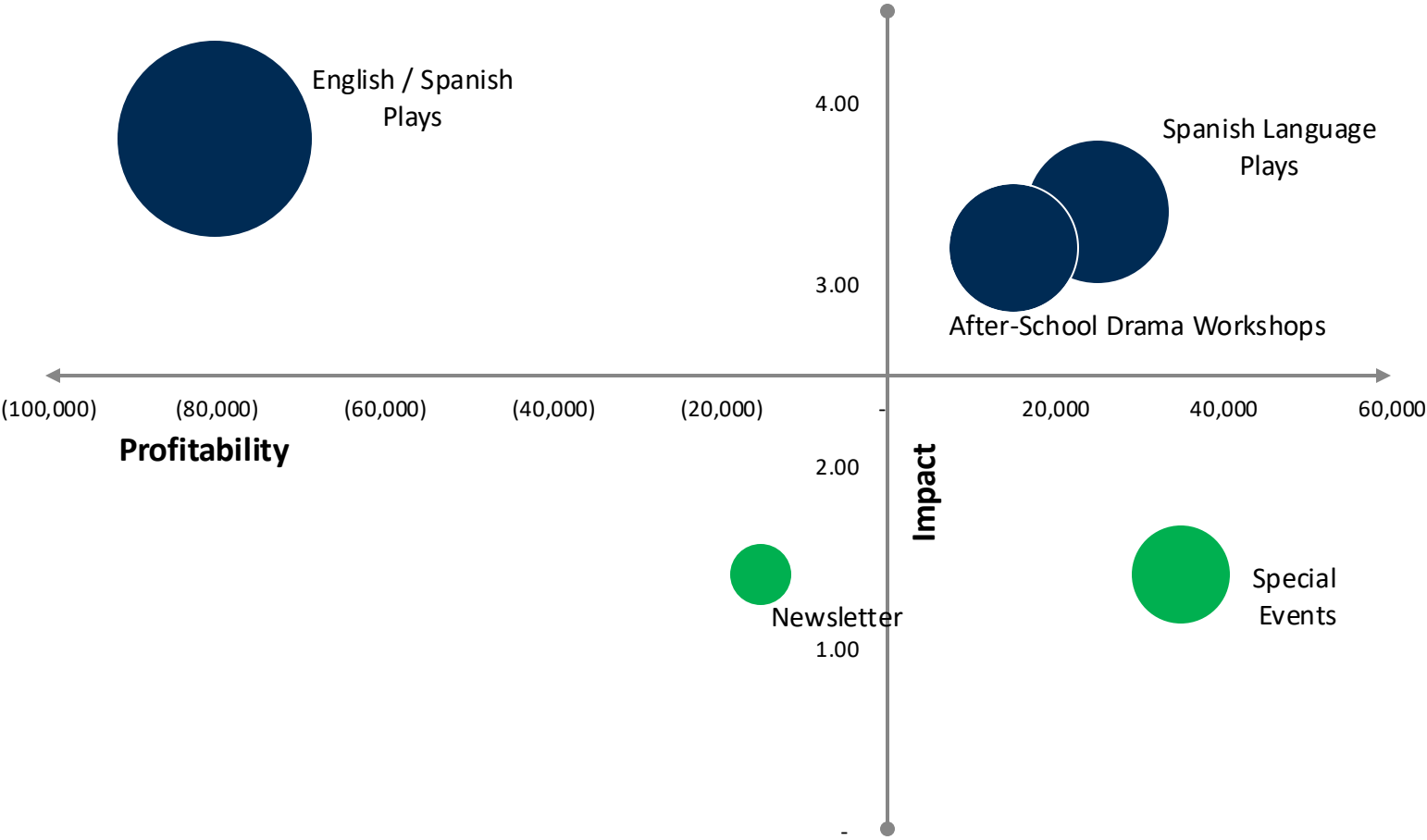
Different Strategies; Same Mission



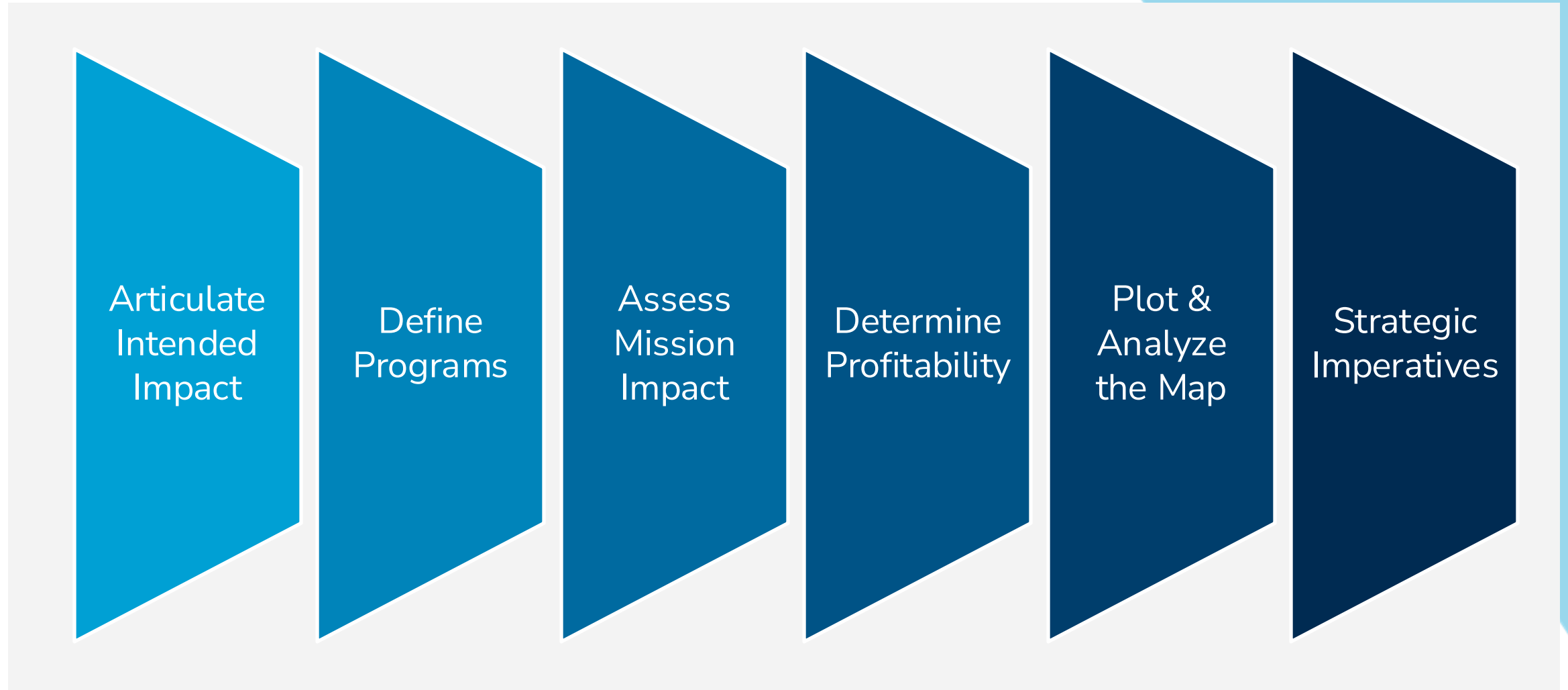
The Matrix Map



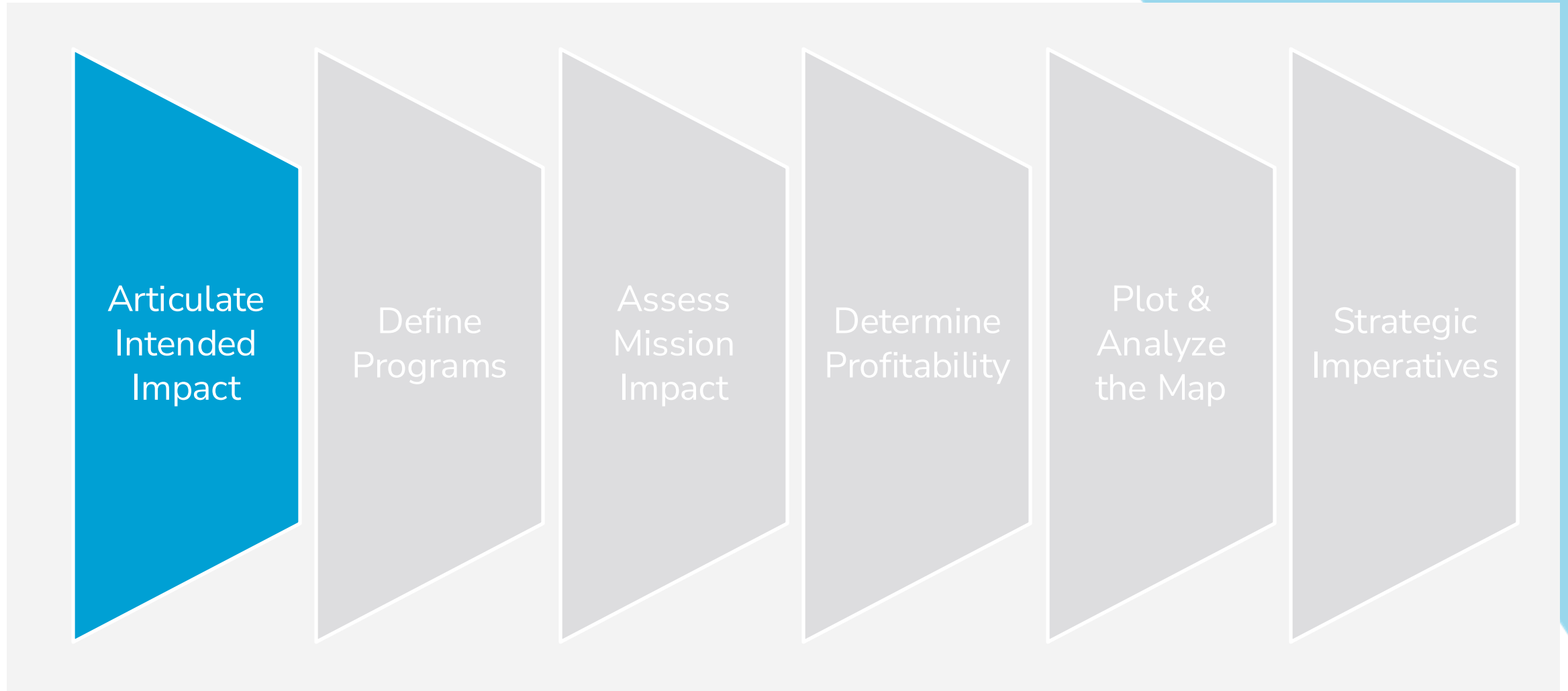
Sample Matrix Map



The Matrix Map Process



The Matrix Map Process



Start with Impact!



Defining Intended Impact

Articulating Impact

A statement or series of statements about what the organization is trying to achieve and will hold itself accountable for within some manageable period of time. It identifies both the benefits the organization seeks to provide and the beneficiaries.

- - - Susan Colby, Nance Stone & Paul Cartter

Bridgespan Group

Sample: Mission v. Impact

Mission

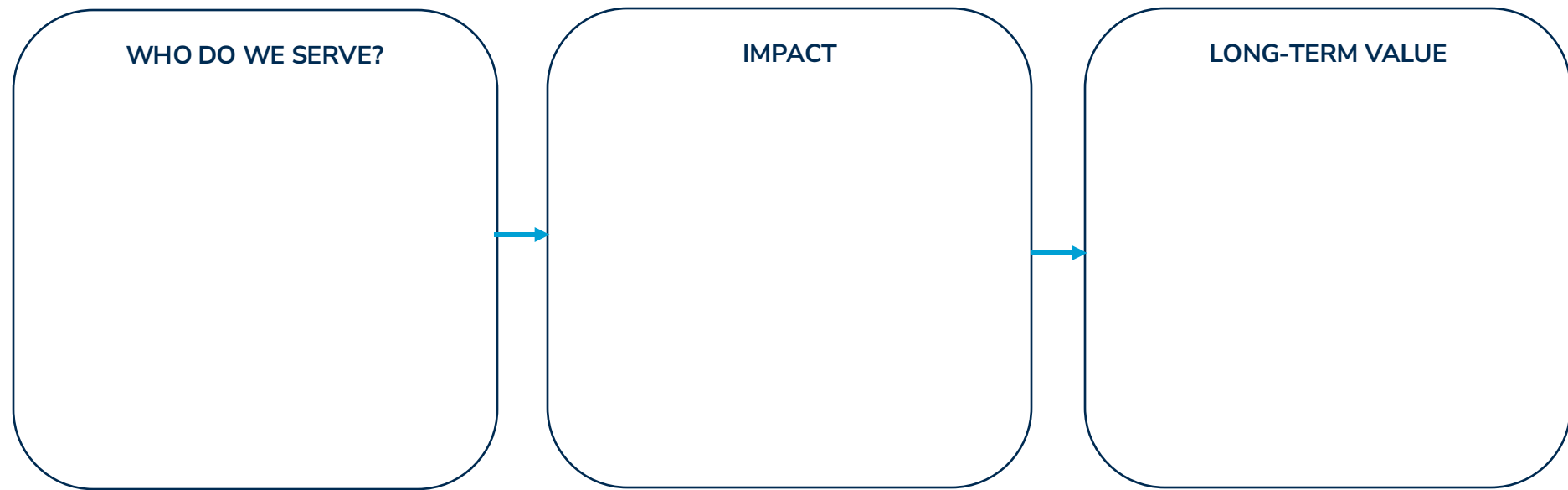
To assist individuals and families living with special needs to prosper in our community.

Intended Impact

People living with special needs of all ages living in our county limits will have an improved quality of life as defined and measured by:

- Employment
- Living independently
- Access to resources

Intended Impact Outline



Intended Impact Outline

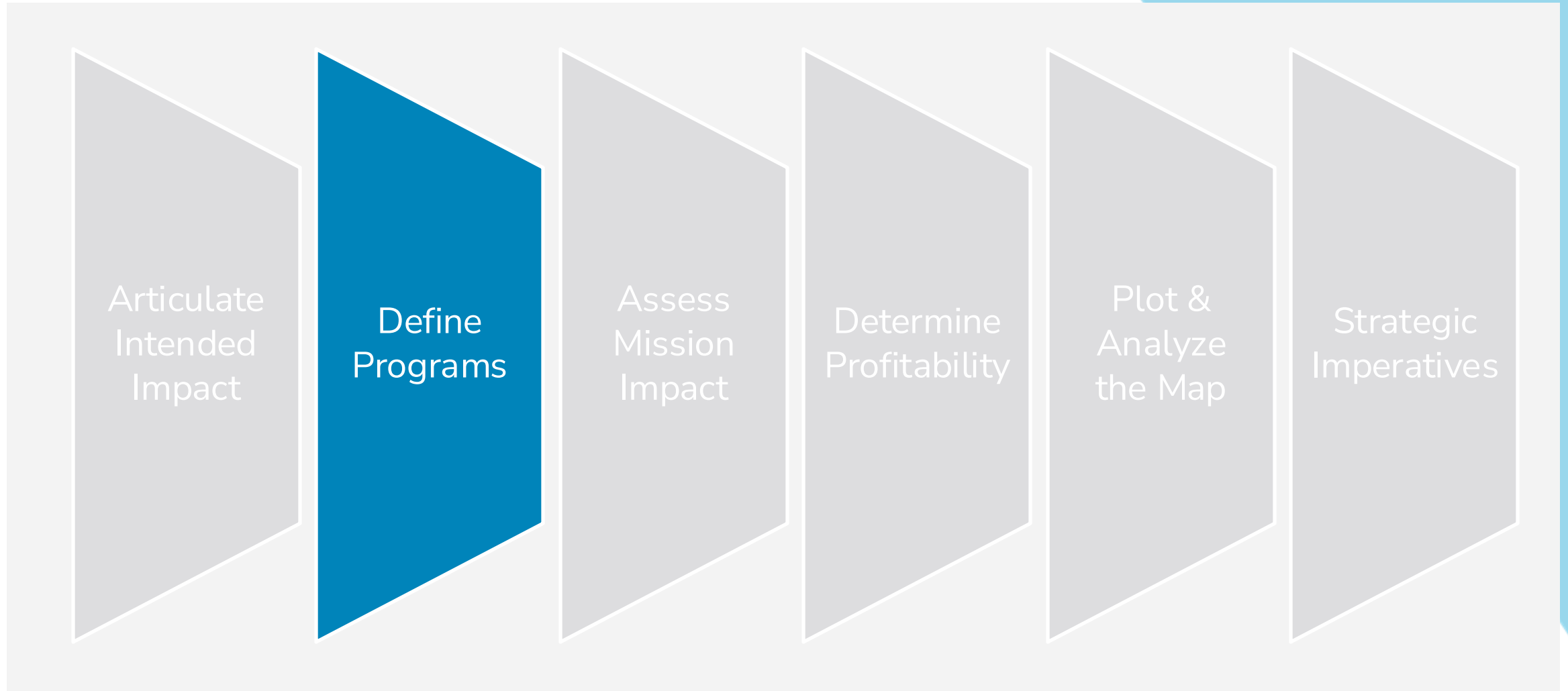




Questions to Ask

1. If we went away, who would it matter to and why?
2. What is the specific anticipated change our organization hopes to achieve because of our efforts?
3. Who are our primary beneficiaries? Who or what are we ultimately trying to serve? Is there a geographic limit?
4. How can our success be measured?

The Matrix Map Process



Programs



*Mission-
Specific
Programs*



*Fund
Development
Programs*

What are your core programs?

Anything on which your organization spends a significant amount of effort or resources (time or money) on.

Examples

Program

- A service or program and its funding stream
- ❖ A service or program without directly associated income
- \$ A revenue-generating activity

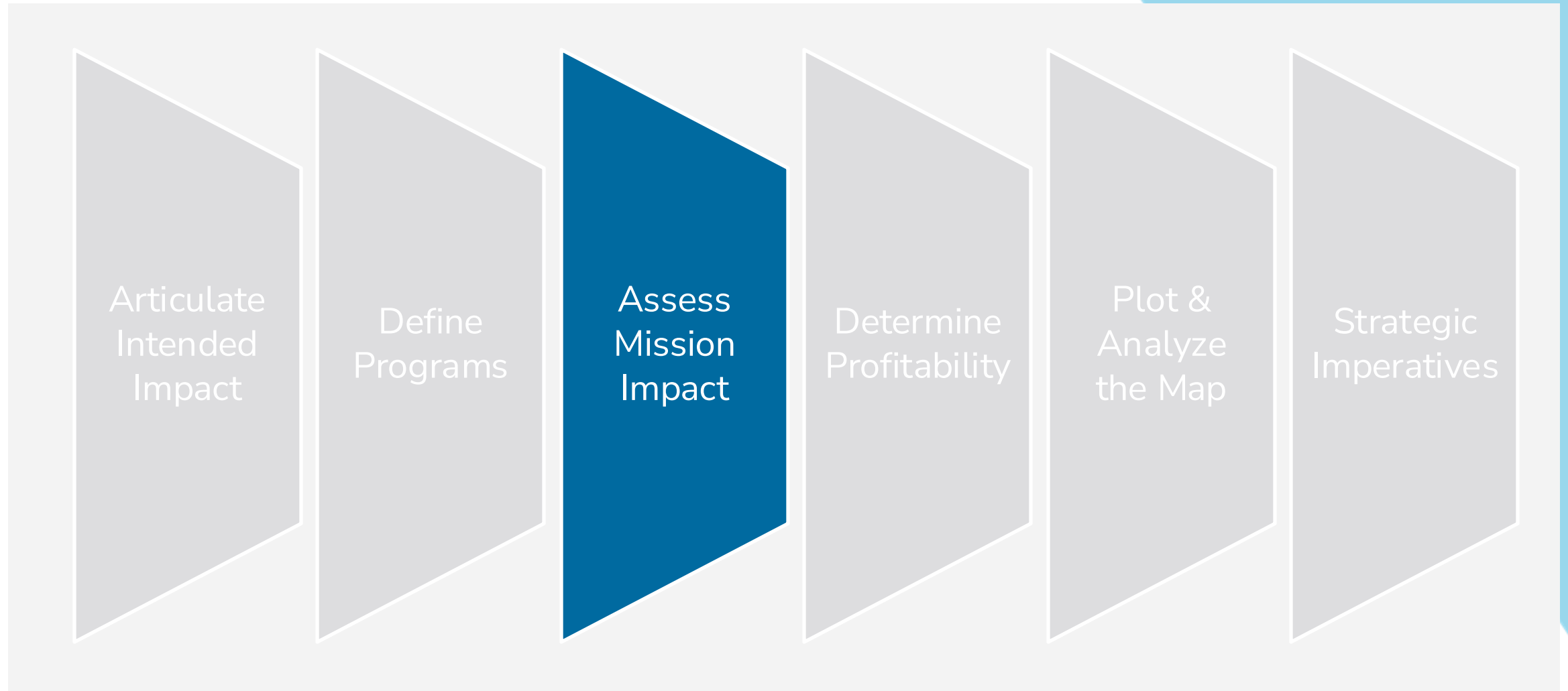
Example

- Senior congregate meals funded by county
- Fee for service program
- ❖ Domestic violence outreach program
- ❖ Resource Library
- \$ Grant writing for unrestricted money
- \$ Annual dinner
- \$ Unrelated product sales

Your Turn!

| Mission Specific | Fund Development |
|---|---|
| Those programs whose primary purpose is fulfillment of the organization's mission through program activities. These activities may or may not also directly generate revenue. | Those programs whose primary purpose is the generation of unrestricted funds to be allocated to other programs in accomplishment of the organization's mission. |
| | |

The Matrix Map Process



Everything your organization does has impact.

But it doesn't all have the **same** impact.

Selecting Criteria

Primary

1. Contribution to impact
2. Excellence in execution

Secondary

- Significant unmet need
- Community building
- Scale
- Depth
- Leverage

Primary Criteria

Assessing Mission Impact

1

| Criterion | Description |
|---------------------------------|--|
| Contribution to Intended Impact | Relative to other programs, how well does this program contribute to what the overall organization aims to accomplish? |
| Excellence in Execution | Is this program something that the organization delivers in an exceptional manner? |

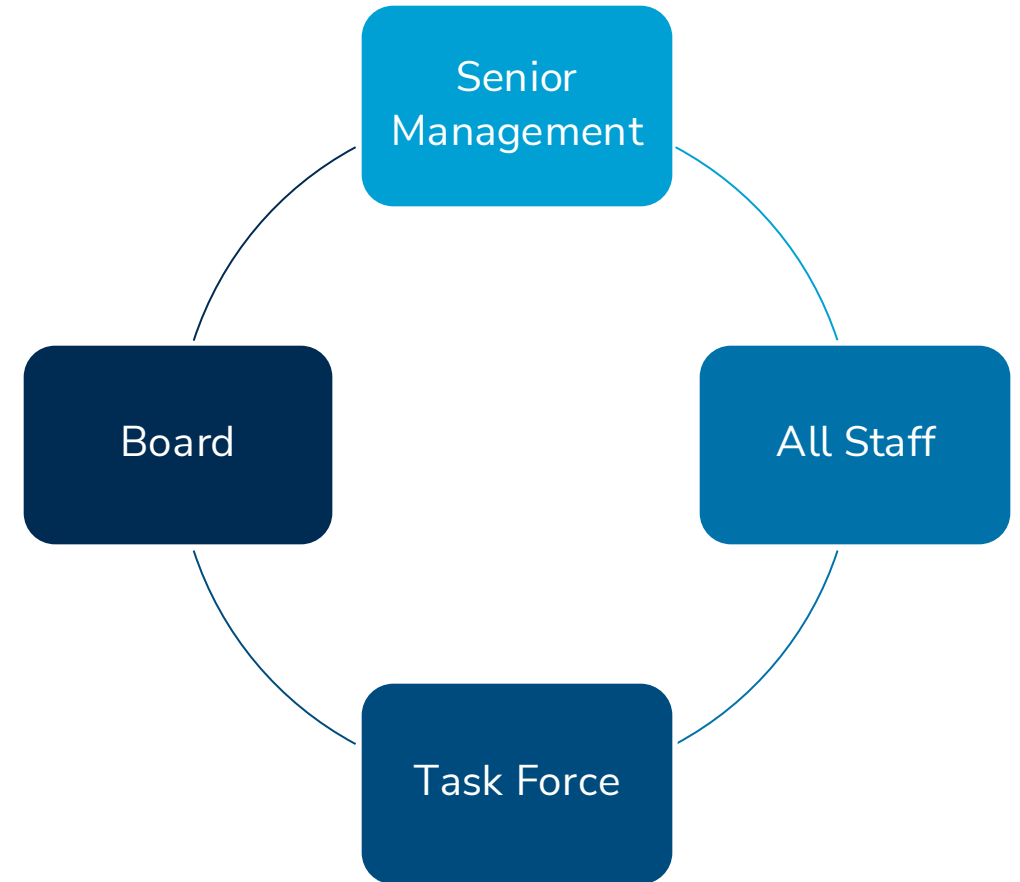
Secondary Criteria

Assessing Mission Impact

2

| Criterion | Description |
|------------------------|---|
| Significant Unmet Need | Is there significant competition or are there similar offerings of this program? Is there an adequate supply of services to meet the demand for them in the community? |
| Community Building | Does this program build community around the program or the organization as a whole? |
| Scale | How many people are touched or influenced by this program? |
| Depth | How profound is the level of intervention with this program? |
| Leverage | Does this program benefit from and nurture important relationships and the partnerships inside and outside the organization? |

Consider Who Is Involved



Scorecard Example

| | Contribution to Impact | Excellence in Execution | Community Building | Significant Unmet Need | TOTAL |
|---------------------|------------------------|-------------------------|--------------------|------------------------|-------|
| Daycare | 4 | 3 | 4 | 3 | 3.50 |
| Social Justice | 4 | 4 | 4 | 4 | 4.00 |
| New Parent Coaching | 3 | 3 | 3 | 3 | 3.00 |
| GED Support | 2 | 2 | 2 | 2 | 2.00 |
| Career Services | 3 | 2 | 2 | 3 | 2.50 |
| Facility Rental | 1 | 2 | 2 | 1 | 1.50 |
| Individual Donors | 2 | 4 | 2 | 1 | 2.25 |
| Foundations | 2 | 3 | 1 | 1 | 1.75 |
| Special Events | 2 | 3 | 2 | 1 | 2.00 |

Mission Impact Assessment Steps



Looking at programs...



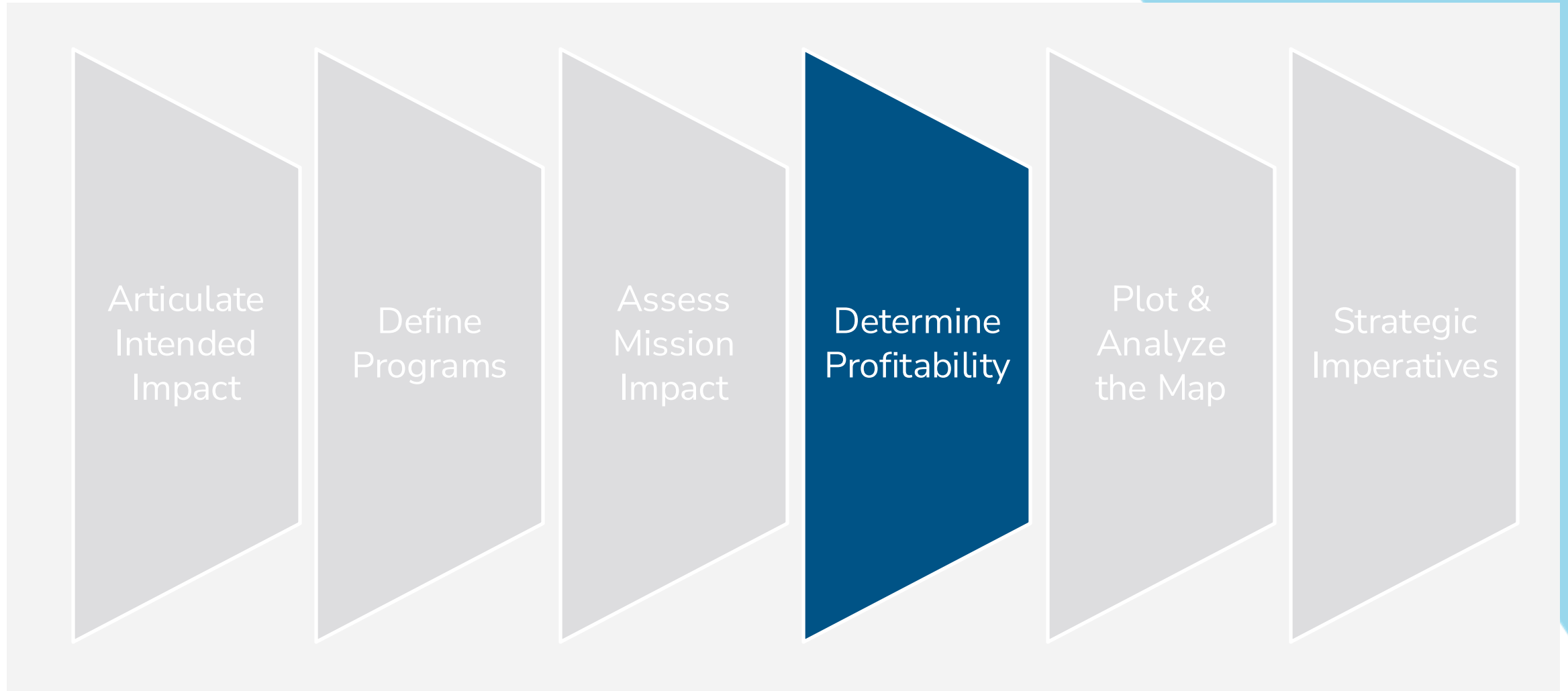
Your Turn

1. Using a couple of the programs you identified, rate them – relative to each other – on the four criteria. Use 1 to 4 with 4 being high:

- Contribution to Intended Impact
- Excellence in Execution
- Community Building
- Significant Unmet Need

| Program | | | | | | | | | |
|-----------|---------------------------------|-------------------------|--------------------|------------------------|---------|--|--|--|--|
| | Contribution to Intended Impact | Excellence in Execution | Community Building | Significant Unmet Need | Average | | | | |
| Program A | | | | | | | | | |
| Program B | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
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| | | | | | | | | | |

The Matrix Map Process



Are our programs profitable?



Understanding True Costs

| | |
|--------------------------|---|
| Specific Expenses | Those expenses that relate directly to the program |
| Shared Expenses | Those expenses split between multiple programs such as occupancy and technology. |
| Admin Expenses | Those expenses related to time spent with the board, finance and overall organizational structure and function. |

Allocating Revenue

Specific Revenue

- Government contracts
- Restricted foundation grants
- Fee for service money

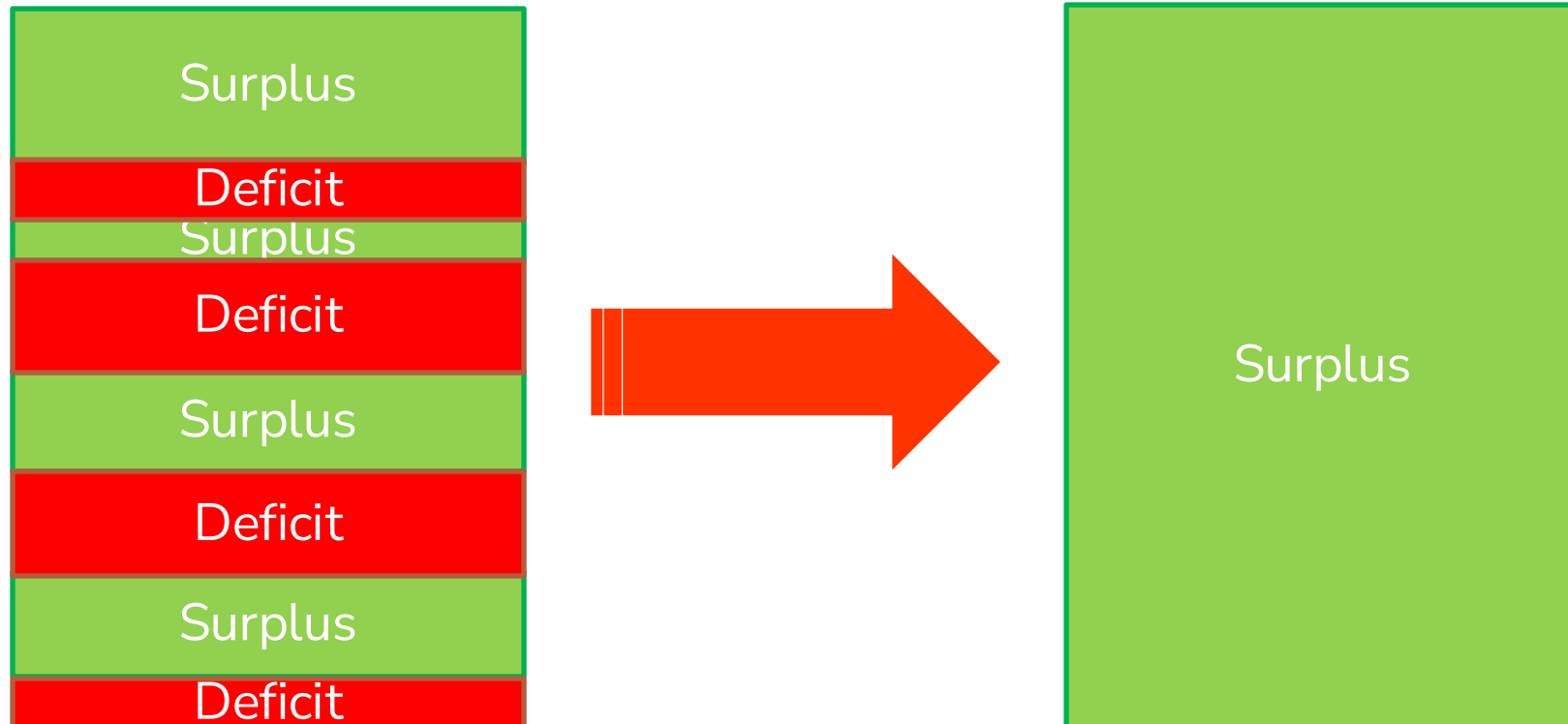
Unrestricted Revenue

- Unrestricted contributions by individuals or foundations
- Special events

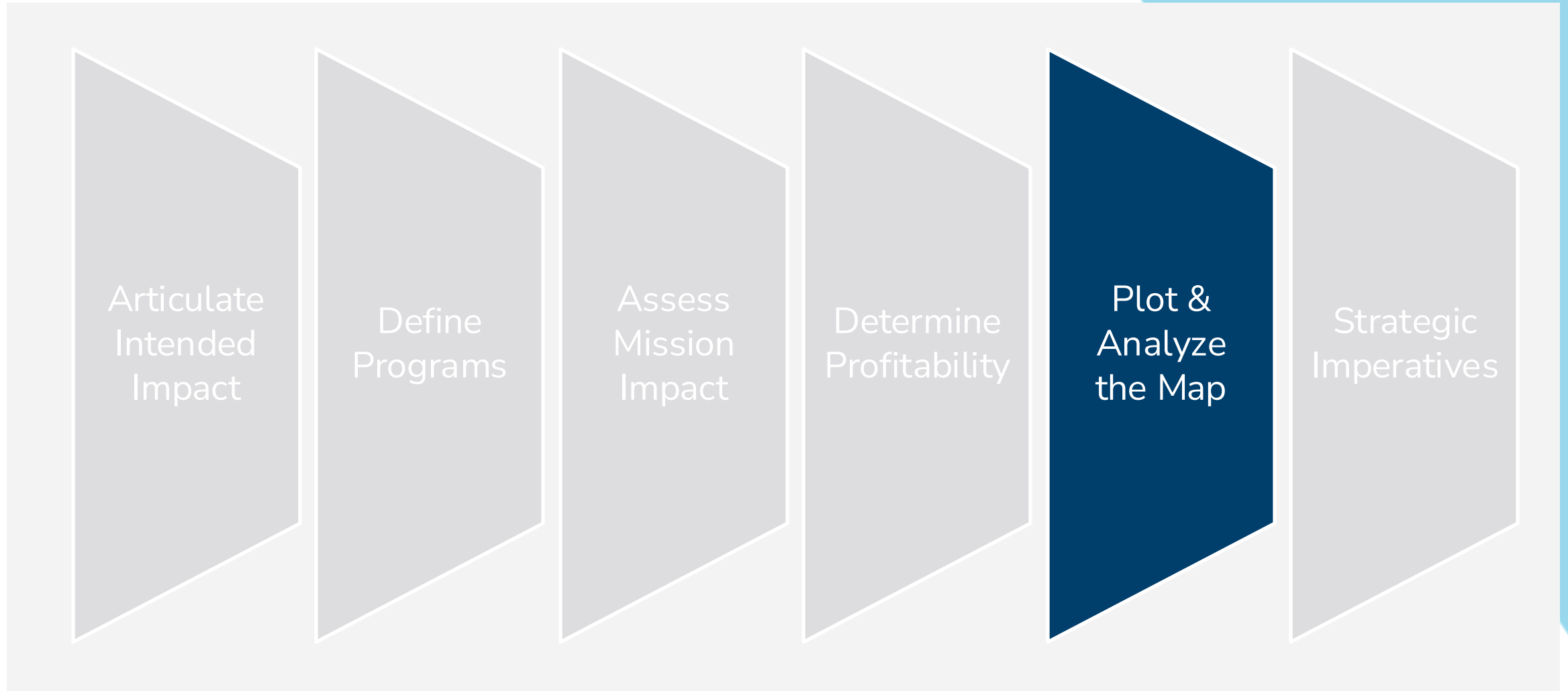
Are our programs profitable?



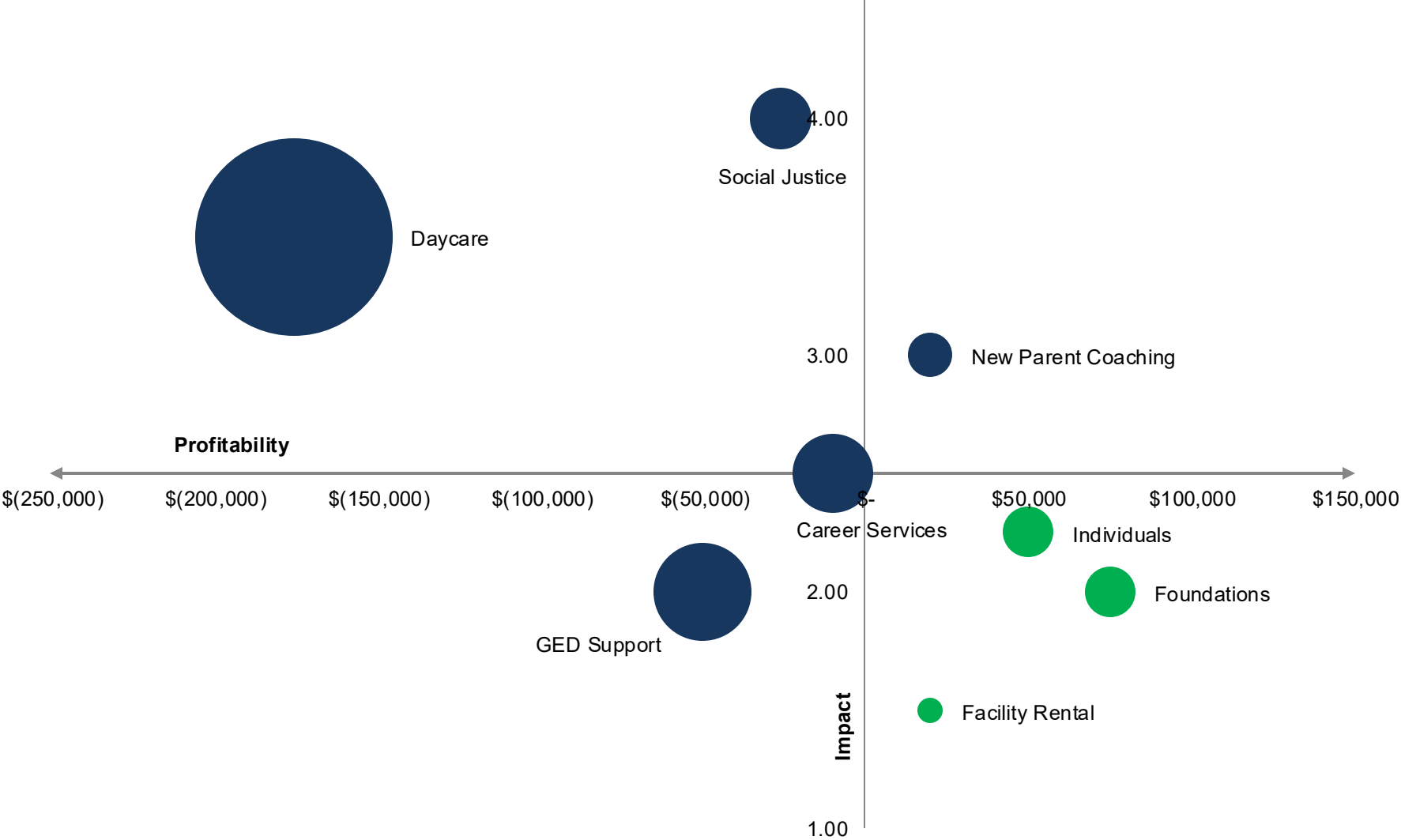
Organizational Profitability



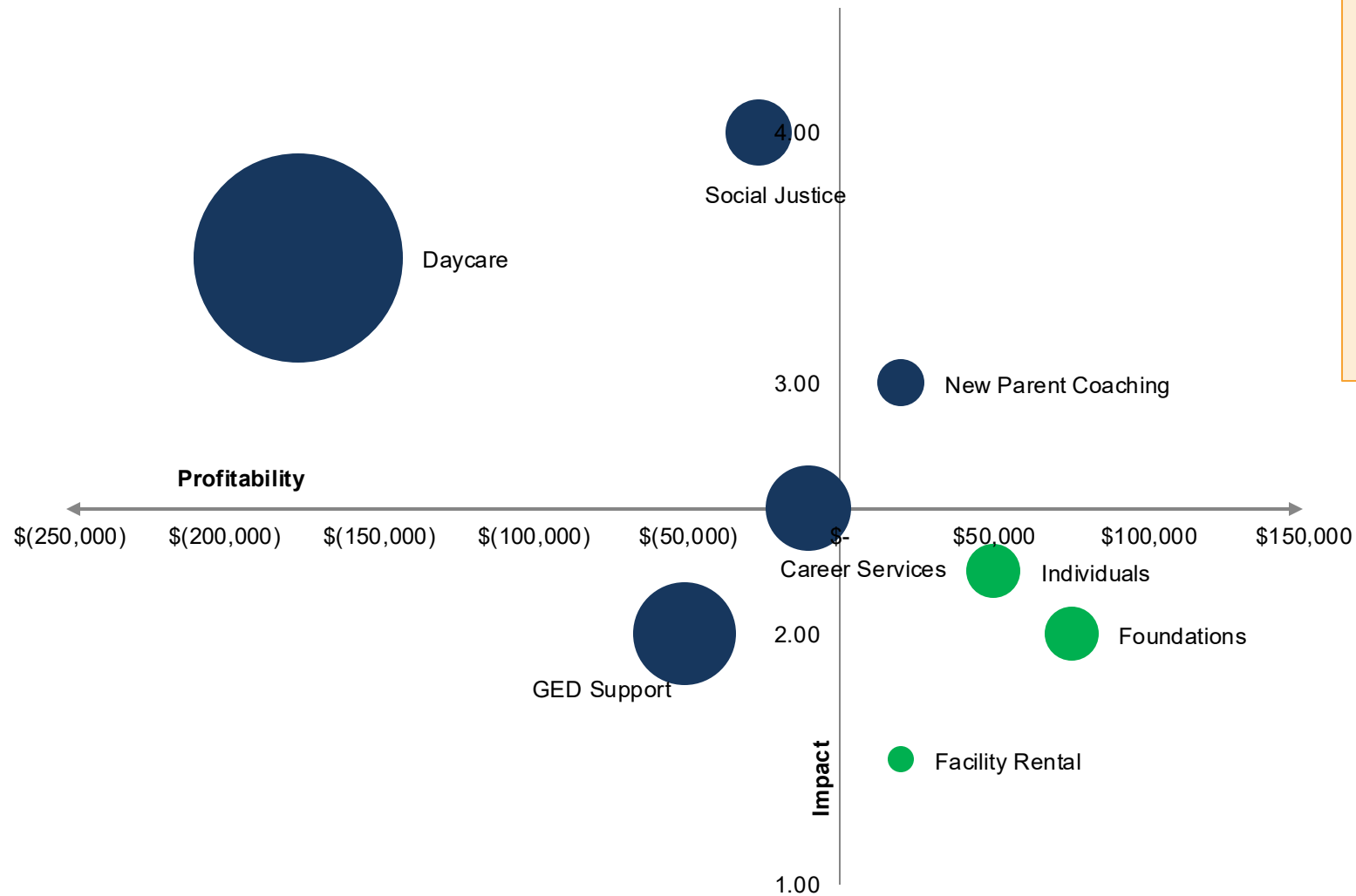
The Matrix Map Process



Matrix Map

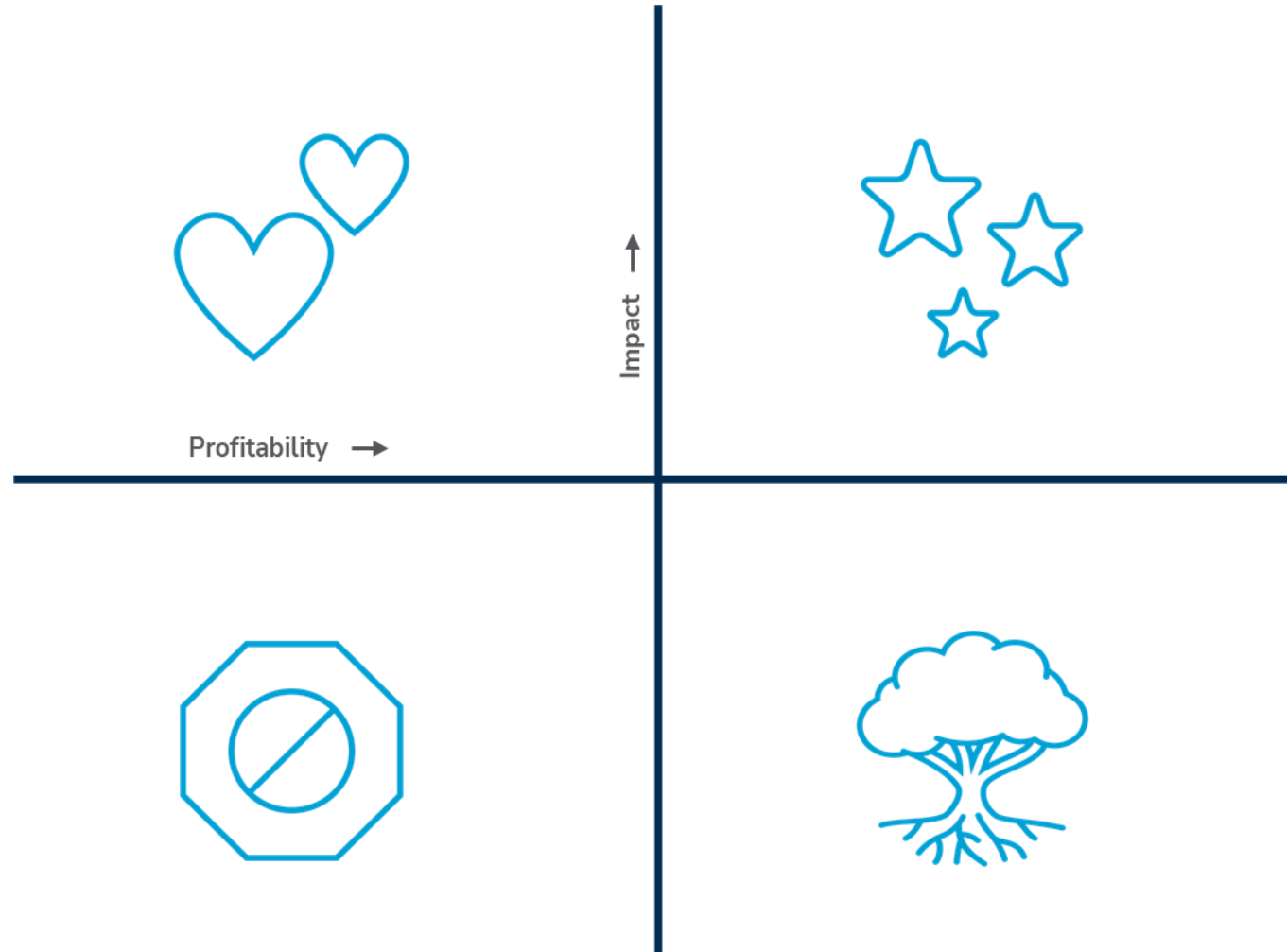


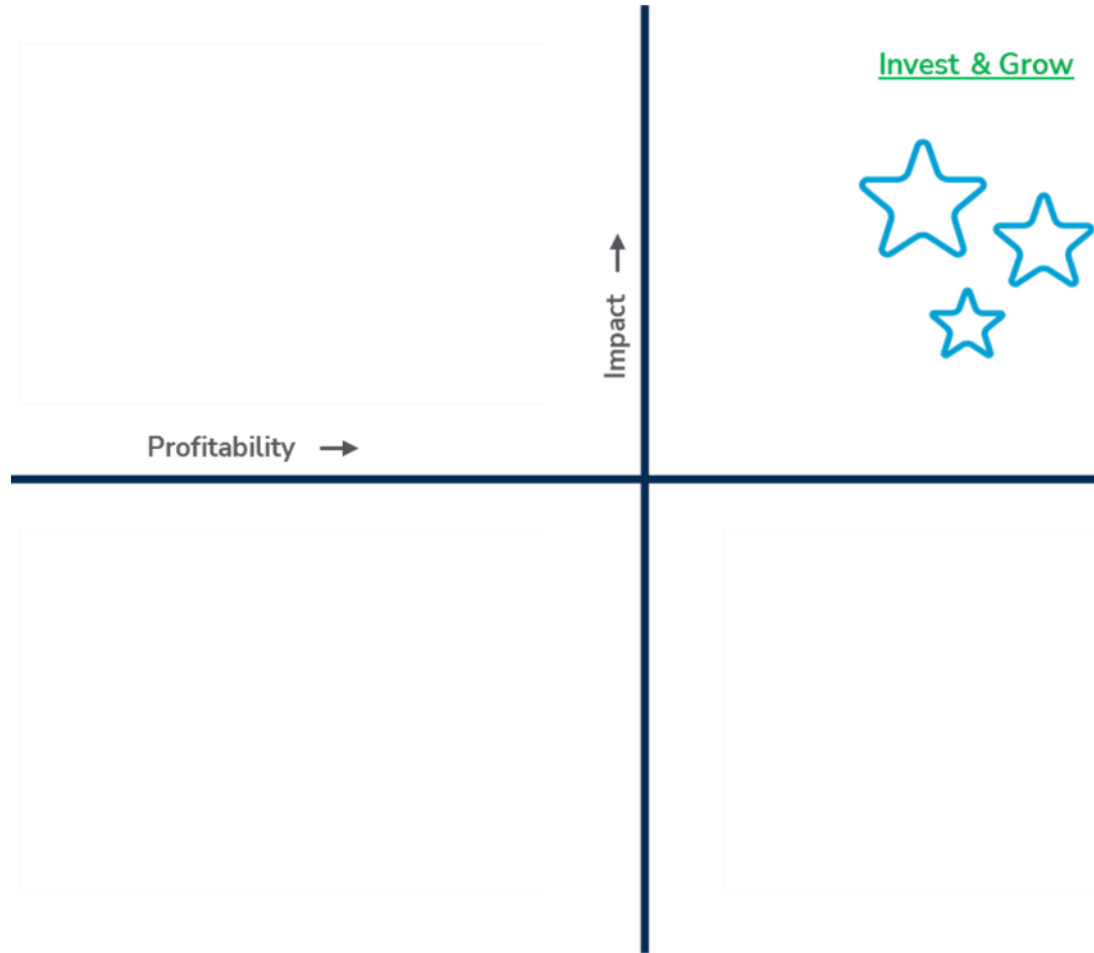
Matrix Map



What is driving impact?
What is driving profitability?
How has the map changed over time?
What has caused that change?

Strategic Imperatives of the Matrix Map





Programmatic Level Inquiries

The Star Quadrant

Do we understand the needs and motivations of stakeholders who make the star possible?

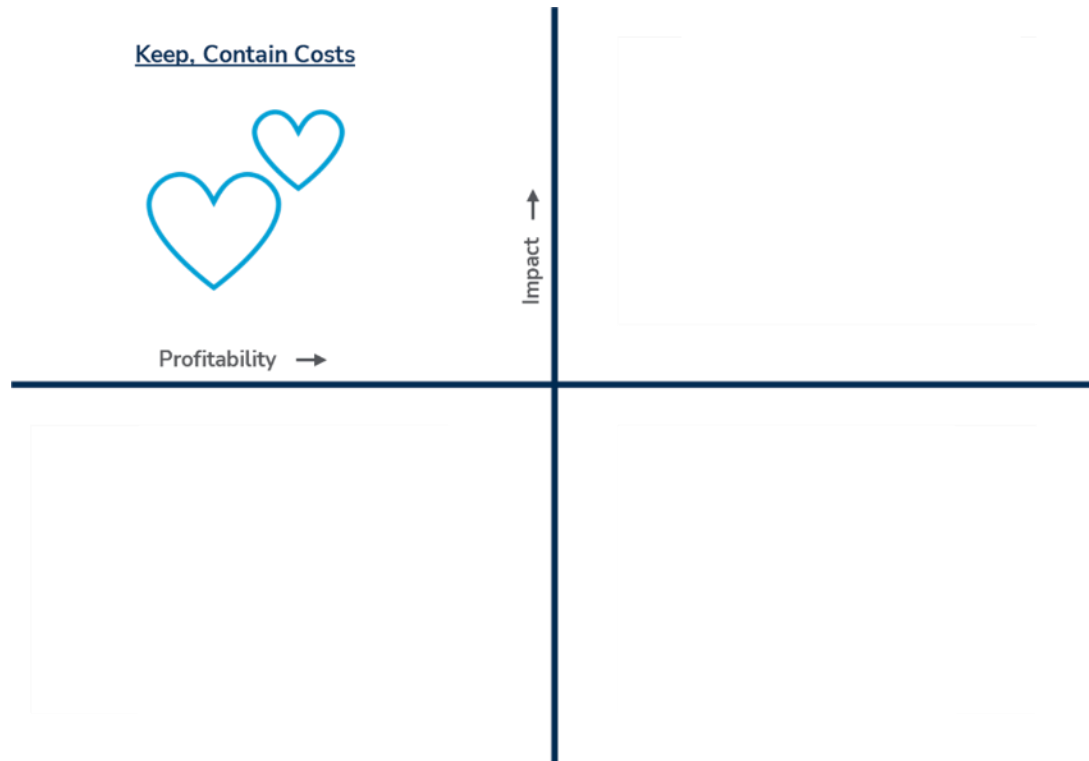
Are there opportunities to expand the program's impact and revenue?

Programmatic Level Inquiries

The Heart Quadrant

Can we envision this program achieving the same impact with a different cost structure?

Is there a different revenue strategy to consider?



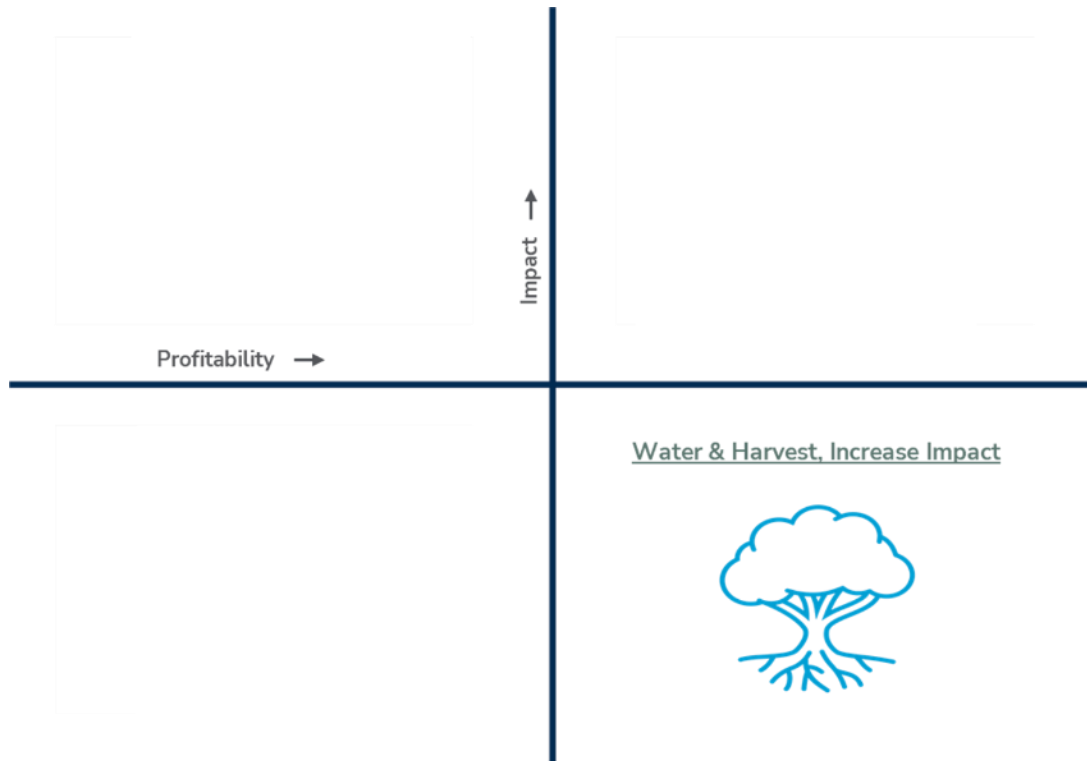
Programmatic Level Inquiries

The Money Tree Quadrant

Can the net surplus be increased and if so, what investment will that growth require?

Are there means to reducing the program's costs and improve the margin?

Are there ways to achieve greater impact by making the program stronger?



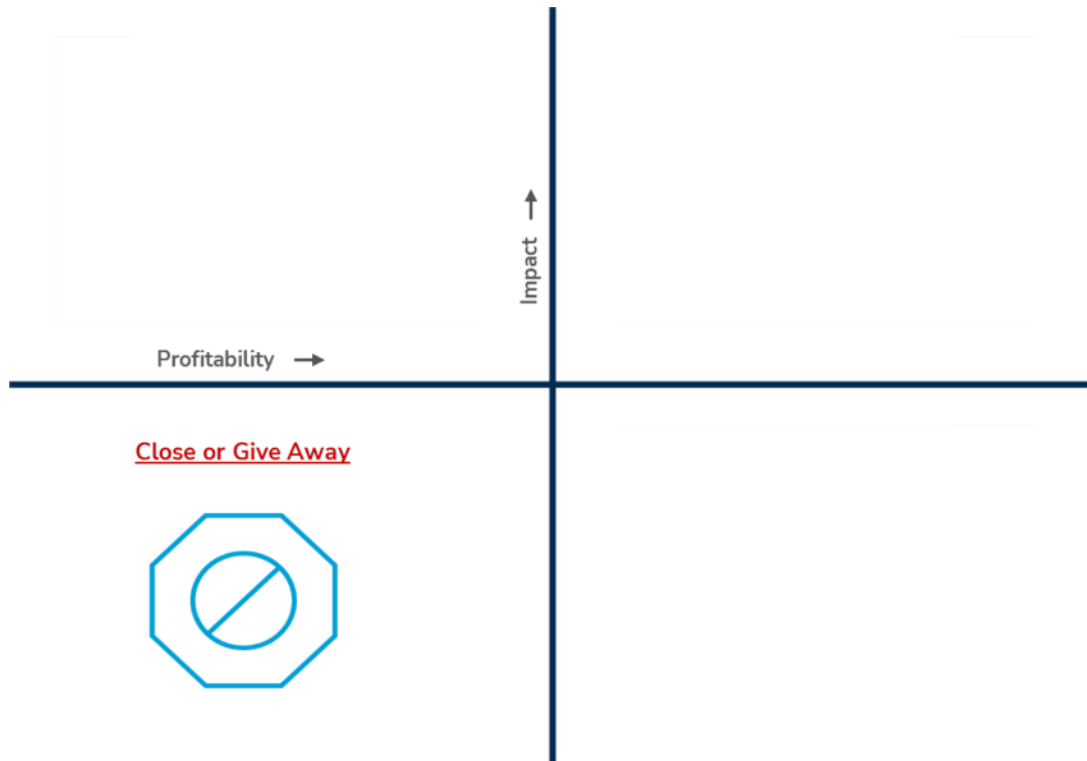
Programmatic Level Inquiries

The Stop Quadrant

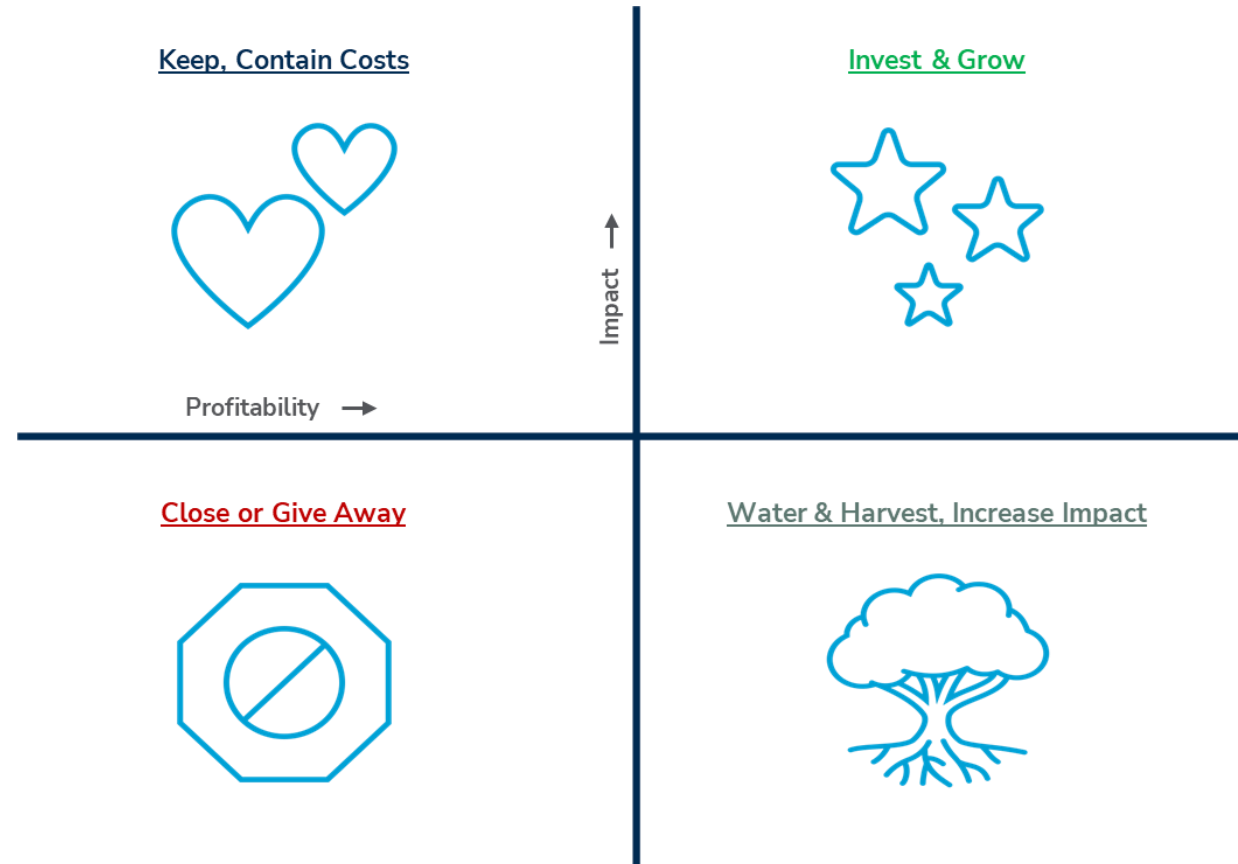
Can we innovate this program to move out of this quadrant?

How long will we give ourselves to move the stop sign?

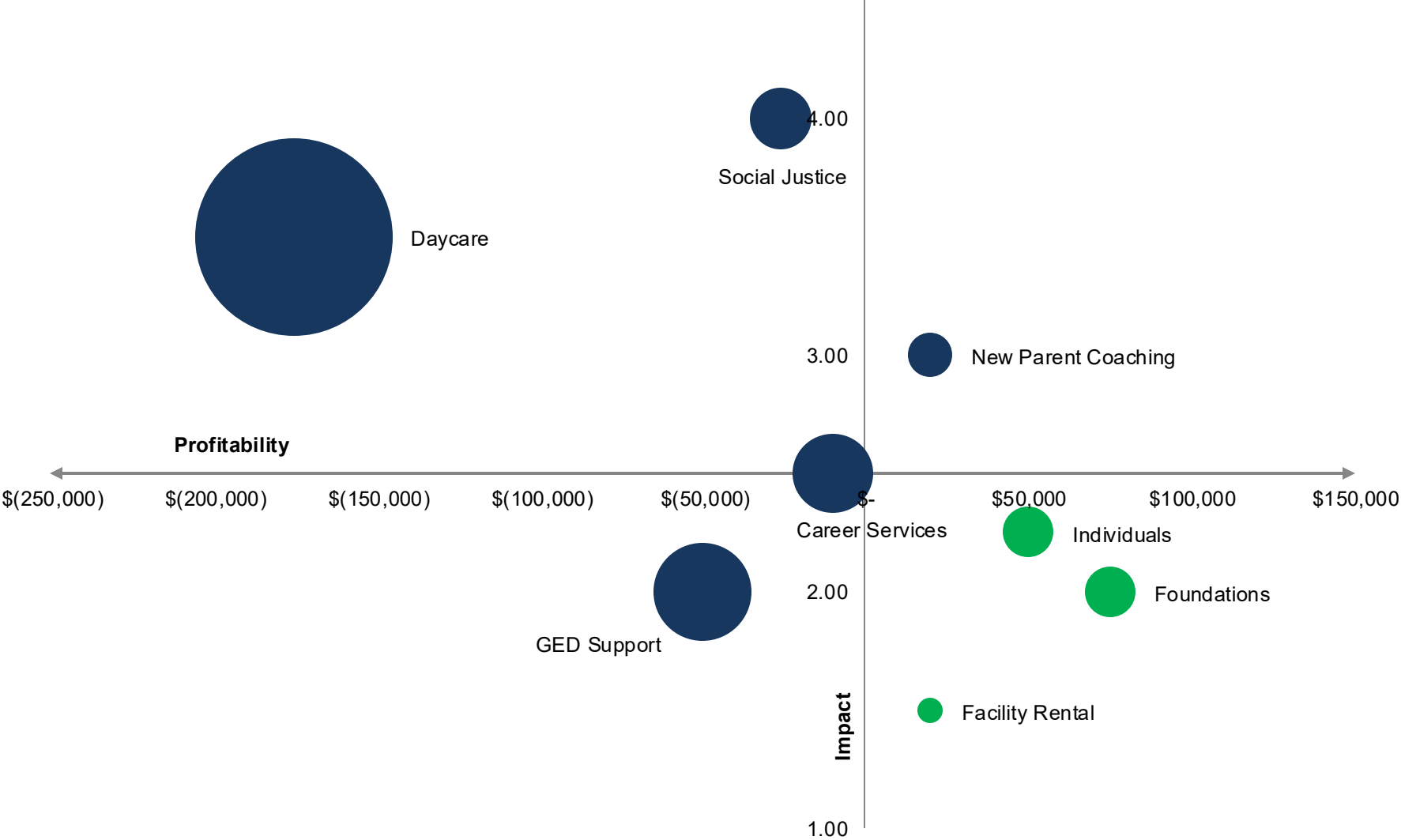
Is that the best use of resources?



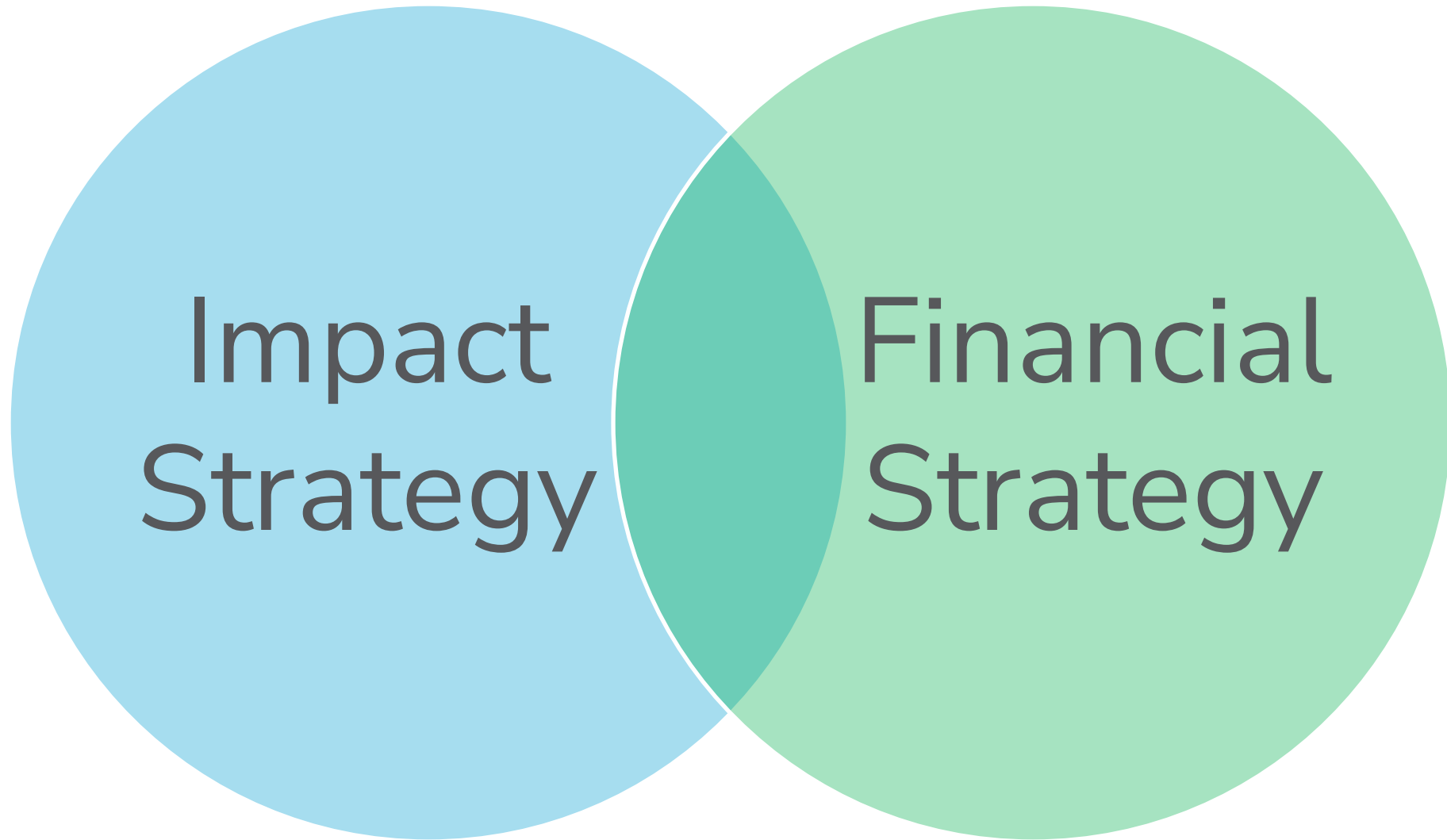
Strategic Imperatives



Matrix Map



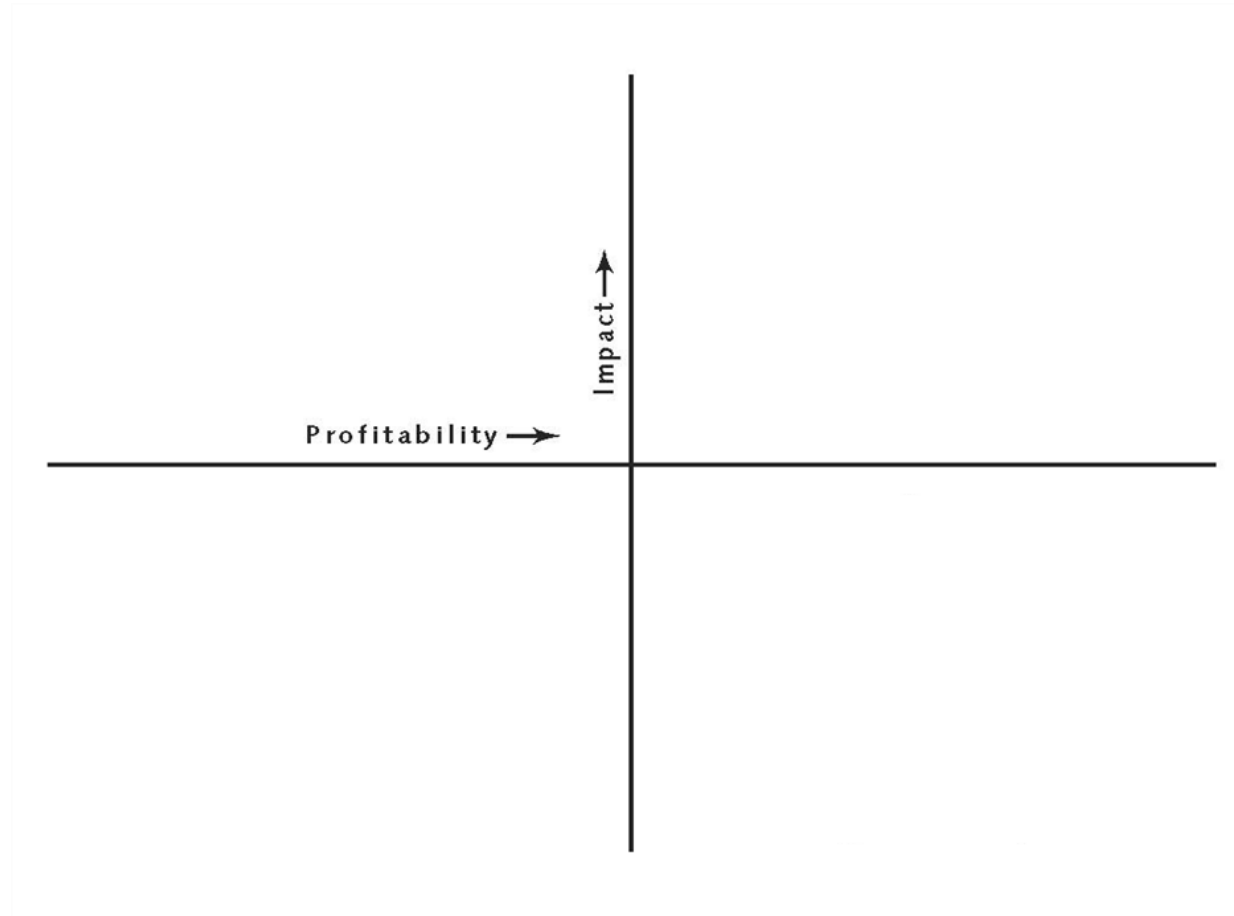
Key Takeaways



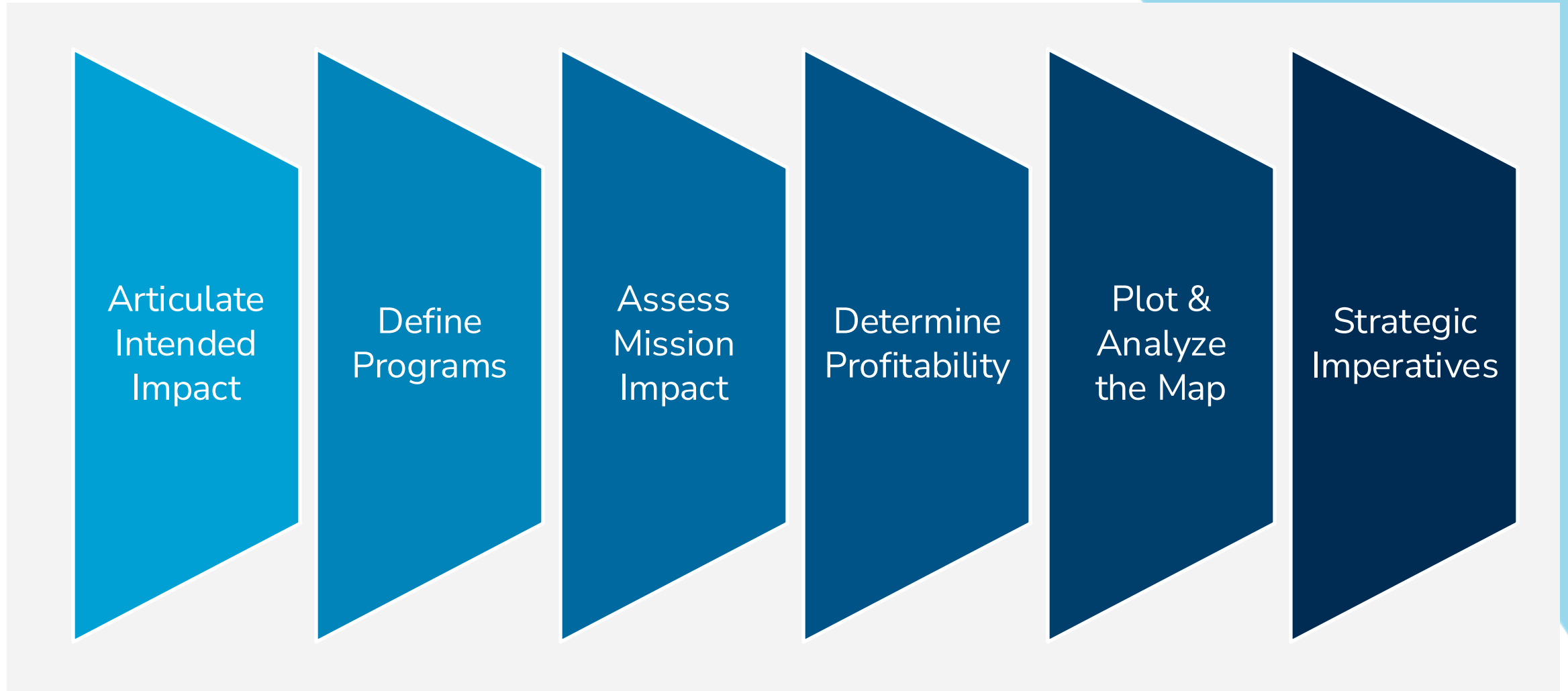
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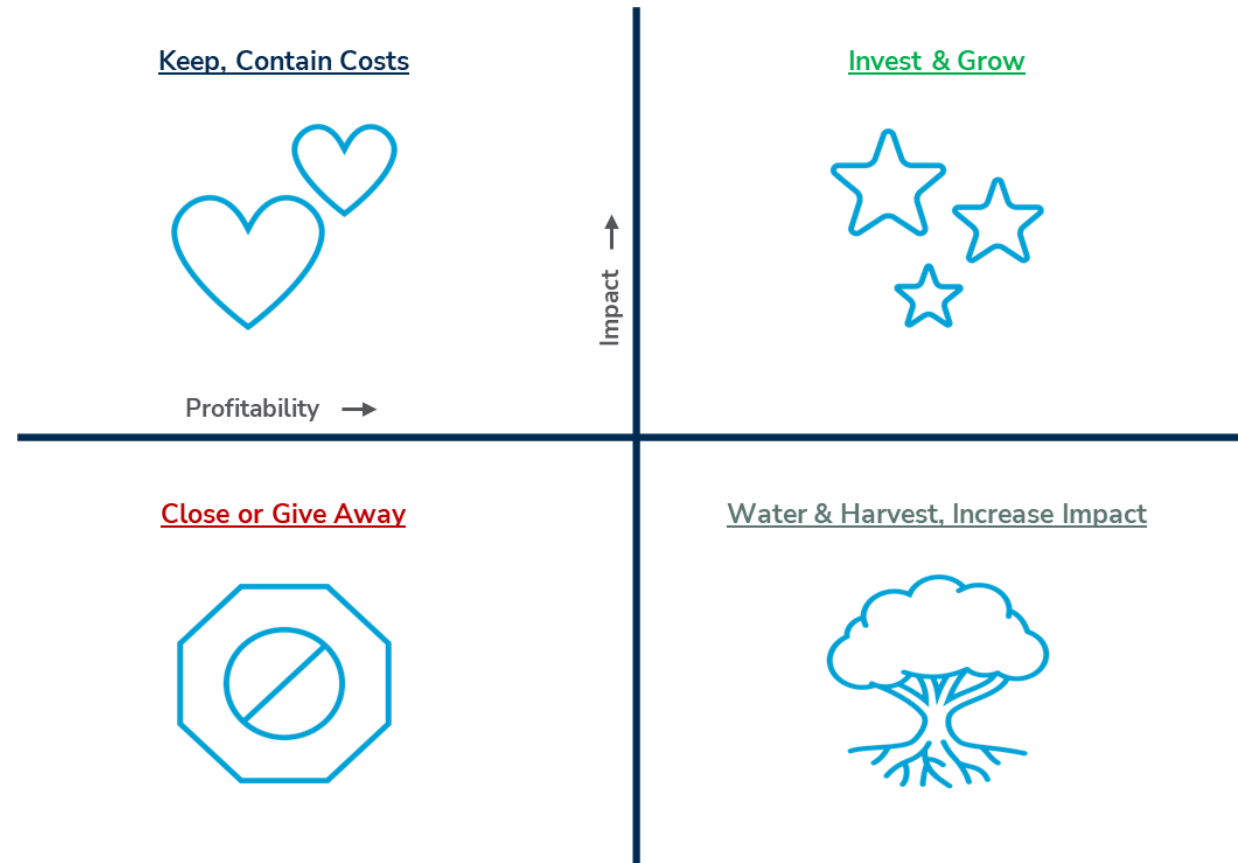
The Matrix Map



The Matrix Map Process



Use the Matrix Map to Make Strategic Decisions



Thank you!

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www.spectrumnonprofit.com

Templates available at

Nonprofitsustainability.org