

Making Strategic and Effective Decisions

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4 – 5 PM ET

Today's Speakers



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About The Bridgespan Group



The Bridgespan Group is a global nonprofit organization that collaborates with mission-driven leaders, organizations, and philanthropists, to make the world more equitable and just.

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Friendly reminders



**After today's webinar,
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- Webinar recording and slides
- Links to all the resources we mention today



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“Strategy is about making choices, trade-offs; it's about deliberately choosing to be different.”

Michael Porter,
HBS Professor of Business Strategy

Getting decisions right means balancing several factors



Effective decision-making requires intentionality across all three stages of the process



Decision setup

- **We get clear about what we are deciding**
- **We define the process and timeline upfront**
- **We assign clear and appropriate decision roles**
 - We bring in the right voices, especially those affected by the decision
 - We do not expect to be involved in every decision
- **We align on what great looks like by clarifying our decision criteria**

Today we will focus on two tools to set up decisions for success

Decision-making

- **We seek options that address inequity/ promote equity**
 - We probe for unintended consequences
- **We assess options objectively**
 - We use input and data vs. opinions
 - We name and interrogate implicit assumptions, beliefs, and values
 - We have open, constructive debate
 - We avoid analysis paralysis, gathering just enough data to make a robust decision
- **We make the decision that's best for the organization**, not just for our own functions

Decision follow-through

- **We proactively communicate the decision and how it was made**
 - We pay particular attention to those most affected by the decision
 - We support decisions, regardless of personal views
- **We plan for execution**
 - We hold ourselves and each other accountable to carry out our commitments
 - We track the outcome to learn and adjust, particularly to the impact on disparities/equity
- **We stay the course**, and do not reopen decisions unless significant factors change

RAPID® Roles for Effective Decision Making



Recommend

- Make the proposal (80% of the work happens here!)
- Assess the relevant facts and analysis; obtain input from relevant parties



Agree

- Provide input that must be considered in making the recommendation
- Set the boundaries within which all recommendations must fall



Perform

- Accountable for executing the decision once it is made



Input

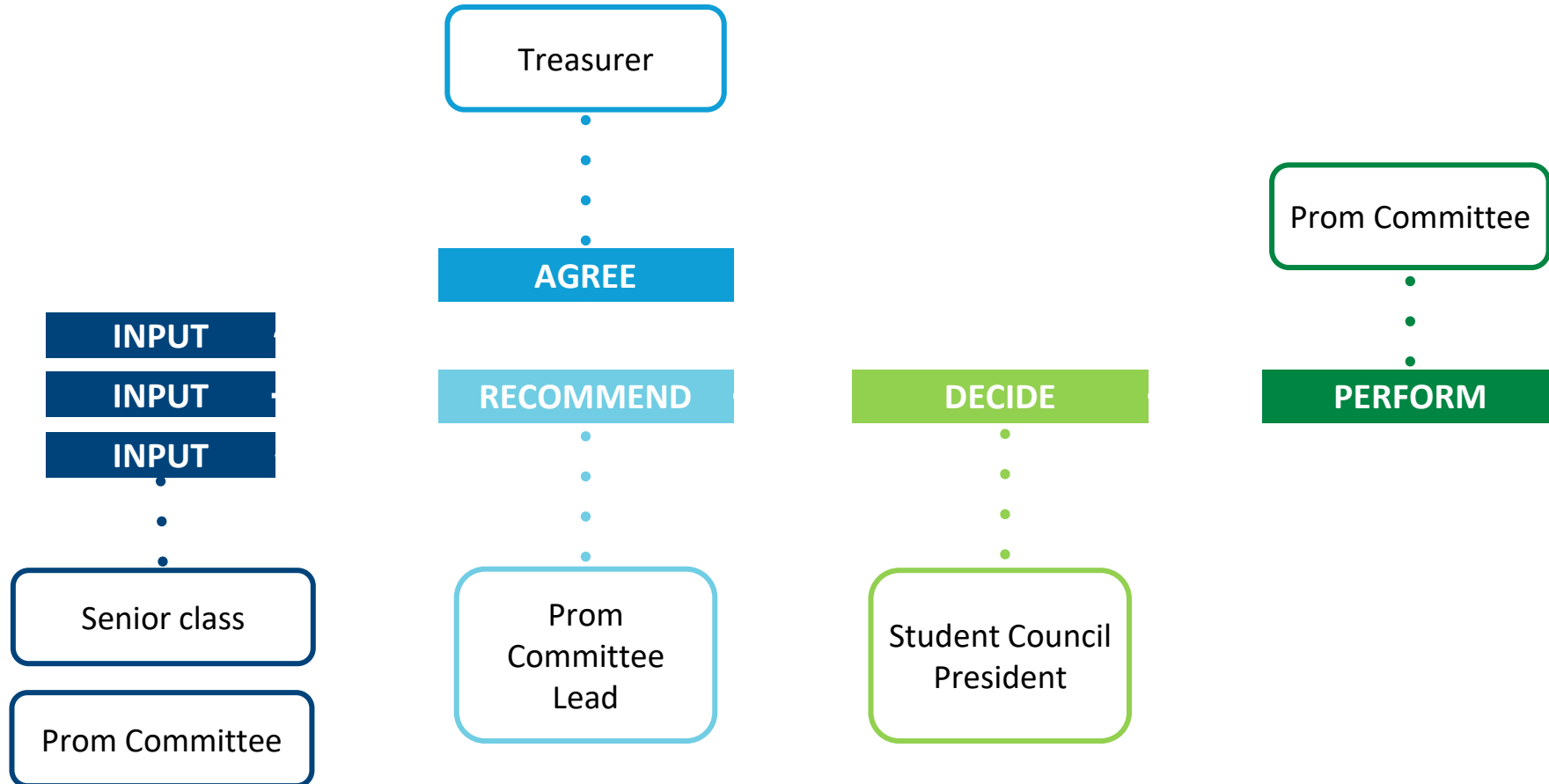
- Consulted on the recommendation
- Provide valued expertise, experience, information
- No obligation for decision maker to act on advice



Decide

- Make the final decision—
“Commit the organization to action”

RAPID[®] example: Deciding on a prom location





Tips when assigning RAPID[®] decision roles

RECOMMEND	<ul style="list-style-type: none"> • There is only one R • R has broad visibility and access to information for relevant inputs • R has credibility with both I's and D
AGREE	<ul style="list-style-type: none"> • A's should be assigned sparingly to ensure feasibility or consistency • Involve the A early – works best when the A is at the Recommend stage, not at the point of final decision-making • Specify the scope of the A
PERFORM	<ul style="list-style-type: none"> • There may be multiple P's involved in execution • In many cases, involving the P also as an I ensures good upfront planning/buy-in and stronger transition to execution
INPUT	<ul style="list-style-type: none"> • There are usually multiple I's • Assign to those whose knowledge, experience, information, or access to resources can help ensure the best decision • Should also assign to those who are profoundly affected by the decision • Not everyone who needs to know about a decision should have an Input role
DECIDE	<ul style="list-style-type: none"> • There is only one D • D should be the person closest to the issue area who also has the ability to understand the trade-offs at play • If D belongs to a group, clarify how it gets exercised (e.g., consensus or majority vote), and how an impasse will be resolved



A decision-making template can set up a decision for success

What is being decided?			
What criteria will make or break this decision?			
Who will play key decision-making roles? <ul style="list-style-type: none"> • Decider: • Recommender: • Input provider(s): • Agree-er (if needed): • Performer(s): 	What is the timeline? <ul style="list-style-type: none"> • Gather information by: • Present to group by: • Make decision by: • Communicate decision by: • Implement decision by: 		
Who needs to be communicated to about this decision?			
Audience	Key Message	Communicator	Timing
How will we track the success of this decision? When?			

Guest Speaker



Alexandra Hernandez
Development Chief of Staff
Natural Resources Defense
Council (NRDC)

What are strategic decision criteria?



Decision criteria are...

A shared list of **explicit, strategy-driven considerations** for organizations to use when evaluating **strategic decisions and new opportunities**

They are beneficial for...

- Strategically aligning decision-making
- Increasing transparency
- Amplifying equity
- Protecting against oversights
- Delegating / distributing decision roles
- Solving the “ten-way tie”

Today we will explore criteria for making **programmatic decisions**; the same principles (but different criteria) apply for other types of decisions in your organization

Decision Criteria Example



Mission Alignment	<ul style="list-style-type: none"> • Aligns with our target client population and mission
Aligned with our impact goals and approaches	<ul style="list-style-type: none"> • Achieves our target outcomes (i.e., successful/sustained housing, community integration, wellness) • Aligns with our core approaches (Street Outreach, Housing Navigation, Interim/Permanent Housing, Systems Impact) • Leverages a model that we believe in and can deliver; maintains fidelity to our best practices (person-centered, harm reduction, trauma/resiliency informed care, informed by a person with lived experience) • Supports or advances racial equity
Financially Sustainable	<ul style="list-style-type: none"> • Dedicated funding is renewable and/or sustainable • Contract is reasonable to deliver (e.g., meets our minimum pay range, provides a minimum COLA of 3%, budget match is <25%, indirect support is >10%, allowable costs are well defined with minimal disallowed categories, payment terms are less than 45 days, documentation is minimally burdensome)
Operationally Viable	<ul style="list-style-type: none"> • Leverages existing operations capacity, or expansion is covered (e.g., office space, facilities oversight, technology, food services) • Start date allows for appropriate time to ramp up (e.g., hire, space planning, etc) • Leadership and admin staff have the capacity to invest as required
Strategic Considerations	<ul style="list-style-type: none"> • Community will support and welcome this project • Provides clear access to a target opportunity if we accept the current project

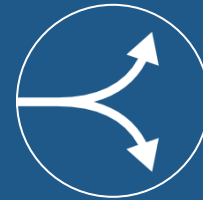
Guidelines for strong strategic criteria



Clearly defined,
objective, and
measurable



Based on accurate,
complete data



Enables
differentiation



Few
in number


Decision Criteria Example: Criteria Rubric



CATEGORY	CRITERIA	CONCERNING	EXCELLENT
<p>Alignment with Mission and Theory of Change</p>	<ul style="list-style-type: none"> • Aligns with our target client population 	<p>Does not align with our current client population</p>	<p>Aligns with our current client population and/or expands our target constituents (TAY, DV, Human Trafficking)</p>
	<ul style="list-style-type: none"> • Achieves our target outcomes <ul style="list-style-type: none"> – Successful/sustained housing – Community integration – Wellness 	<p>Doesn't address a key target outcome or doesn't fill a critical gap</p>	<p>Fills a critical gap or enables us to grow our impact in achieving one or more target outcomes</p>
	<ul style="list-style-type: none"> • Aligns with our core approaches <ul style="list-style-type: none"> – Street Outreach – Housing Navigation – Interim/Permanent Housing – Systems Impact 	<p>Does not address one of our core approaches or doesn't fill a critical gap</p>	<p>Fills a critical gap or enables us to grow our impact in one or more of our core approaches</p>
	<ul style="list-style-type: none"> • Leverages a model that we believe in and can deliver <ul style="list-style-type: none"> – Person-centered – Harm reduction – Trauma/resiliency informed care – Informed by a person with lived experience 	<p>We would need to develop entirely new skills (either through training or hiring) that are unreasonably costly given impact potential</p>	<p>We already have the skills and expertise to do this well (i.e., we've done it before) or we can build the expertise with a reasonable expense</p>



Try to find the FEWEST criteria that help your organization DIFFERENTIATE between the opportunities you evaluate

CATEGORY	Sample criteria for making programmatic decisions	
Aligned with Theory of Change	<ul style="list-style-type: none"> • Who: Focuses on target constituents / clients • What: Achieves target outcomes • How: Aligns with core activities, approaches, values, beliefs 	 <p>Tailored to each nonprofit: Invest time in customizing and aligning as a team</p>
Financially sustainable	<ul style="list-style-type: none"> • Net financial contribution is positive • Funding is renewable and sustainable • Cost per outcome is reasonable • Utilization rate is expected to be high 	
Operationally viable	<ul style="list-style-type: none"> • Aligns with our diversity, equity, and inclusion goals • Feasible with current staff skills/capacity, or can be built • Feasible with current infrastructure/facilities, or can be built • Relationships with partner organizations are strong • Policy environment is supportive • Achievable path to a scale that will have meaningful impact 	 <p>More consistent across nonprofits: Select the limited few that are highest priority and customize if needed</p>
Organization benefits/risks	<ul style="list-style-type: none"> • Does not duplicate strong programs from other orgs • Provides a unique leadership role for organization • Organizational risks are low (reputation, relationships, legal) • Provides a credible path to other high-impact opportunities 	<div style="border: 1px solid orange; padding: 5px; color: orange;"> <p>Choose the 8-10 most critical for your organization</p> </div>

Additional resources

The RAPID Decision-Making Tool for Nonprofits

<https://www.bridgespan.org/insights/nonprofit-organizational-effectiveness/rapid-decision-making>

Includes embedded toolkits and resources!



Using Decision Criteria to Improve Nonprofit Program Choices

<https://www.bridgespan.org/insights/nonprofit-organizational-effectiveness/using-decision-criteria-to-improve-nonprofit-program-choices>

Includes embedded toolkit!

Aligned with Theory of Change	<ul style="list-style-type: none"> • Who: Focuses on target constituents / clients in our intended impact • What: Achieves target outcomes in our intended impact • How: Aligns with core activities, approaches, values, beliefs in our theory of change
Financially sustainable	<ul style="list-style-type: none"> • Net financial contribution is positive • Funding is renewable and sustainable • Cost per outcome is reasonable • Utilization rate is expected to be high • <i>Other?</i>
Operationally viable	<ul style="list-style-type: none"> • Aligns with our diversity, equity, and inclusion goals • Feasible with current staff skills/capacity, or can be built • Feasible with current infrastructure/facilities, or can be built • Relationships with partner organizations are strong • Policy environment is supportive • Achievable path to a scale that will have meaningful impact • <i>Other?</i>
Organization benefits/risks	<ul style="list-style-type: none"> • Does not duplicate strong programs from other orgs • Provides a unique leadership role for organization • Organizational risks are low (reputation, relationships, legal) • Provides a credible path to other high-impact opportunities • <i>Other?</i>

Five Ways that Nonprofits Can Make Decision Making More Inclusive—and More Effective

<https://www.bridgespan.org/insights/nonprofit-organizational-effectiveness/5-ways-nonprofits-make-decision-making-inclusive>

Includes embedded toolkit!

Structuring Your Decision-Making Process

<https://www.bridgespan.org/insights/decision-making-best-practices>

Includes embedded checklist!



Sharing research, insights, and practical tools is core to our theory of change



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200+
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1,000+
Short pieces & tools

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Bridgespan’s Leadership Accelerator

[Bridgespan Leadership Accelerator](#) offers four self-paced programs for leadership teams interested in addressing a specific strategy or management challenge. Programs are roughly ~4 months in length. Cohorts launch every six months. **Currently preparing for the next session of programs starting in August 2026.** If you are interested in learning more about these programs, please email Ruben.Johnson@Bridgespan.org to receive outreach once the Fall cohort is underway.



www.bspan.org/BLA

Enrollment open for Fall programs

Achieving Strategic Clarity



Get clarity on your organization’s impact goals and programs

Creating an Adaptive Plan



Create a dynamic plan to navigate uncertainty with confidence

Strengthening the Executive Team



Unlock your team’s full potential

Investing in Future Leaders



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