IDEA JourneyTM Scoping

Rough Order of Magnitude Assessment and Log Frame
(Part two of Discovery Process)

Have a challenge you want to solve

Opportunity accepted

Identify partner

Kickoff meeting

Define scope and Logframe

SOW Approved

Contract/MOU signed

Finalize
Logframe

IDEA Journey begins

Complete discovery form

**YOU
ARE
HERE**

Delving deeper – background and funding

|  |  |
| --- | --- |
| Summarize your organization’s background and history, or supply a link |  |
| Describe your organization’s culture |  |
| Please attach copies of your Strategic Plan and Organization Chart (staff roles) when you send in this scoping form, or attach links here | Strategic Plan: |
| Organization Chart: |
| What Key Performance Indicators (KPIs) are associated with your Strategic Goals? |  |
| List your aspirations for this year’s fundraising and impact |  |
| How do you decide where to allocate funding? |  |
| Is your funding restricted or unrestricted? What funding ratios/constraints do you have? |  |
| What is your donor mix? |  |
| Describe the model by which you obtain supporting contributions for your mission |  |
| Financial overview | Primary source(s) of funds: |
| Primary expenditures: |
| Total operational funding: |
| Please explain to what extent data sharing can occur within the privacy regulations under which you operate |  |

Delving deeper – technology and data

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| --- | --- |
| What project devices and operating systems do you provide to your staff and volunteers?  | (Ie, Microsoft Windows, Chromebooks, AppleOS, other? Are mobile devices using current versions of Android, or a mix of Apple and other devices?) |
| What project devices and operating systems do you expect from your program participants? | (Ie, Microsoft Windows, Chromebooks, AppleOS, other? Are mobile devices using current versions of Android, or a mix of Apple and other devices?) |
| Provide an overview of the data currently collected (related to project). Where is the information stored? |  |
| What policies govern data in your organization? |  |
| Do you have a formal data classification and retention policy? |  |
| Do you make project data externally accessible? |  |
| What non-Personally Identifiable Information (PII) or data do you access while executing your mission? |  |
| Do you share information with other stakeholders/organizations/government bodies etc? If so, who? |  |
| Describe your technology ecosystem (including vendor offerings and estimated number of licences or users for each) |  |

Delving deeper – your project

|  |  |
| --- | --- |
| What factors are driving the need for this project? Why change, and why now? |  |
| What is the ideal timeline for this project? |  |
| List any external factors that could impact the proposed project | Factors that could have **positive** impacts: |
| Factors that could have **negative** impacts: |
| Other major pain points/trends/needs relevant to this project |  |

Create your Log Frame

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| --- |
| **Your IDEA Journey Logframe is a one-page summary of your proposed project and its impact on your mission and project participants.**1. Open the Logframe template sent to you by your IDEA Journey technology partner (see example below)
2. Complete the fields to the best of your ability, considering your current project plans
3. Send your Logframe PPT, along with this form and the documents listed below to digital@nethope.org and to your technology partner
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**Please send this form, along with your completed Log Frame, a copy of your organization’s latest Strategic Plan (including your mission, vision and values), and an Organizational Chart to** **digital@nethope.org** **and to your IDEA Journey technology partner**. Thank you for taking the time to pursue an IDEA Journey with NetHope. We look forward to working with you to solve your challenge and you will hear from us or your IDEA Journey technology partner soon.