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Pipeline Criteria Assessment Toolkit

Assessment frameworks, categories and scoring approach to help teams explore and prioritise social investment opportunities



How to use the Pipeline Criteria Assessment Tool

Purpose: A structured approach for exploring and comparing potential social investment opportunities, helping teams make transparent and consistent decisions aligned with their strategy.

When to use: During early pipeline development and regular reviews of pipeline opportunities

Owners & Audience: Social investment teams lead the assessment process. Results can be reviewed by management to support discussion, prioritisation and decision-making.

Key inputs: Information and evidence about potential investment opportunities and prospective partners, together with the organisation's strategy and investment priorities.

How It Works

i. Identify a potential investment opportunity
ii. Gather relevant information and evidence
iii. Assess the opportunity against the criteria
iv. Consider strategic alignment, strengths, risks and gap
v. Use the assessment to inform progression and prioritisation decisions

Output: A prioritised pipeline of opportunities and a documented rationale for decision-making.

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Criteria Assessment Framework – Criteria Categories

The nine criteria below provide an indicative framework for assessing potential investment opportunities. Each criterion (1-9) is scored from 1 (poor) to 5 (excellent), while the prompts underneath highlight factors that may be considered when determining a score. The criteria and prompts can be tailored to reflect your organisation's strategy, priorities and context.

Team Objectives		Investment Profile			Partner			
1. Scalable	**2. Strategic alignment**	**3. Context relevant**	**4. Evidence driven**	**5. Innovation stage**	**6. Values aligned**	**7. Community led**	**8. Track record**	**9. Timely**
Large reach or opportunity to go to scale	Aligns with team impact objectives	Addresses context specific need / barrier	Evidence supports potential for impact	Early stage innovation or pilots a novel idea	Will increase outcomes for target groups	Opportunity aligns with partner plans and approach	Previous funding with successful outcomes	Investment design can be completed within 6 months
Aims for systemic change	Addresses ≥1 priority investment domain	Considers cultural overlay in its location	Built using data on greatest need and opportunity	Credible pathway for impact beyond initial investment	Partnership can be built on trust	Investment in leadership and capability building	Examples of previous successful delivery (impact)	Can accommodate accelerated stand up of new work (if relevant)
	Aligns with corporate strategy		Can be easily understood and quantified		Open to partnership with us		History of working successfully with target groups	
			Existing measurement and evaluation confirm impact credibility		Evidence of alignment through previous partner experience		Has previously received funding from other donors	

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Criteria Assessment Framework – Scoring Criteria

Use the scoring guidance below when assessing each criterion. Scores should be informed by the available evidence and professional judgement.

Scoring criteria

1) Poor: Does not meet target criteria or offer relevant evidence of alignment or appropriate capacity.

2) Below Average: High level reference to target criteria but without clear focus, credibility, evidence or documentation.

3) Average: Demonstrates general commitment, capacity and alignment with target criteria, but limited detail or evidence in key areas.

4) Above Average: Clear alignment with criteria through a defined strategy, rationale, credible supporting evidence and experience.

5) Excellent: Demonstrates deep focus and alignment with target criteria through strong planning, evidence base, proven capacity, project feasibility and alignment with values, target groups and domains.

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Criteria Assessment Framework

Each criteria is scored out of 5 using the prompts on the previous slide as considerations when determining the rating.

		Team Objectives		Investment Profile			Partner				Total
Indicative strategic categories	*Indicative criteria* *List of potential investments*	1. Scalable	2. Strategy alignment	3. Context relevant	4. Evidence driven	5. Innovation stage	6. Values aligned	7. Community led	8. Track record	9. Timely	
Education	***Project X***	3 - Currently operating in 10 schools with potential to expand nationally	3 - Strongly aligns with education and employment pathways priorities	4- Responds to identified barriers for the target population	3- Some evidence of effectiveness but limited evaluation data	2 -Builds on an existing model rather than testing a new approach	4- Strong partnership potential and collaborative approach	2- Evidence of consultation but not fully co-designed	5 - Organisation has extensive experience and demonstrated results	4- Opportunity is well developed and could progress quickly	30/45 Promising opportunity with good strategic alignment and partner capability, with opportunities to strengthen community engagement and evidence.
Economic Equity											
Culture & Wellbeing											
Governance & Leadership											

1. List potential investments….

2. …and score them out of 5 against a systematic criteria

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Criteria Assessment - Template for Download

	Criteria	Team objectives		Investment profile			Partner profile				Total
	List of potential investments	1. Scalable	2. Strategic alignment	3. Context relevant	4. Evidence driven	5. Innovation stage	6. Values aligned	7. Community led	8. Track record	9. Timely	
Strategic Category A											
Strategic Category B											
Strategic Category C											
Strategic Category D											

Each category rated out of 5:
1 (poor) – 5 (excellent)

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Example - Scoring criteria for Education projects

		Criteria Assessment	Scoring Criteria
		The proposed new project or program…	
Team Objectives	**1. Equity**	… focuses on improving outcomes for marginalized or underrepresented young people aged 14 to 20 at some degree of scale	**1) Poor:** Does not focus on marginalized or underrepresented youth aged 14 to 20. **2) Below Average:** Mentions target youth aged 14 to 20, but without clear focus or justification. **3) Average:** Demonstrates general commitment to supporting marginalized or underrepresented youth aged 14 to 20. **4) Above Average:** Clearly targets marginalized or underrepresented youth aged 14 to 20 with a defined strategy and rationale, including possible routes to expand reach. **5) Excellent:** Demonstrates deep focus on marginalized or underrepresented youth aged 14 to 20 including understanding of possible routes to expand reach.
	2. Strategic alignment	… addresses barriers to equitable participation and attainment in Science, Technology, Engineering or Mathematics (STEM) education and/or successful transition to work	**1) Poor:** Lacks alignment with STEM or work transition focus and/or target geographies. **2) Below Average:** Partially relevant but not clearly linked to Foundation's education priorities and/or target geographies. **3) Average:** Generally aligned with Foundation's goals and target geographies but lacks detail or clarity. **4) Above Average:** Strong alignment with STEM and/or work transition in priority geographies. **5) Excellent:** Fully aligned with one or both pillars and clearly targets specified geographies with high relevance.
Investment Profile	**3. Contextually relevant**	… responds to a clearly defined need or gap for the target population, demonstrating sensitivity to the social, cultural, and political context in which the project or program will be delivered.	**1) Poor:** Does not demonstrate understanding of the target population's needs, or the social, cultural, or political context. **2) Below Average:** Makes general or superficial reference to context, with limited insight into the needs or lived realities of the target group. **3) Average:** Identifies a need for the target group and shows some awareness of the context, though not in-depth. **4) Above Average:** Demonstrates a clear understanding of the need and engages meaningfully with the social, cultural, or political dynamics. **5) Excellent:** Responds to a well-defined need and is deeply grounded in the context, with strong sensitivity to contextual factors influencing delivery and impact.
	4. Evidence-driven	… is grounded in existing evidence of need and potential impact and contributes to new learning on what works to improve equitable participation in STEM education and/or transition to work for the target populations in the target geographies.	**1) Poor:** Lacks evidence or rationale for the proposed approach. **2) Below Average:** Provides limited or outdated evidence of need or potential impact. **3) Average:** Presents some relevant evidence and potential contribution to learning. **4) Above Average:** Good use of relevant evidence on need and potential impact and presents a clear plan to contribute to learning. **5) Excellent:** Strong evidence base on need and potential impact and clear plan to generate and share new insights that advance national or global learning.
	5. Innovation / stage	… is in an early stage and/or pilots a novel idea, approach, geography, or with a new target group that requires further testing to establish a ‘proof of concept’.	**1) Poor:** Not early stage or lacks innovative features. **2) Below Average:** Partially new or early stage but lacks clarity or purpose, or has limited innovative features. **3) Average:** Partially new or early stage with some innovative elements present and described. **4) Above Average:** Clearly early stage or testing an innovative idea with plausible rationale. **5) Excellent:** Highly innovative or early-stage initiative with strong justification for proof-of-concept testing.
	6. Community-led	… is co-designed with, and led by, recognized members of the target community, reflecting their priorities, lived experience, and authentic voice while building their confidence and capabilities.	**1) Poor:** No evidence of community or indigenous involvement. **2) Below Average:** Minimal or tokenistic engagement with community or target groups. **3) Average:** Some community consultation or involvement described. **4) Above Average:** Clear co-design with community and reflection of their voices and priorities. **5) Excellent:** Project or organization is fully community-led, deeply embedded in lived experience, and prioritizes building confidence and capabilities.
Partner Profile	**7. Track record**	… is led by an organization with proven experience and credible evidence of working with similar groups, in similar contexts, to address similar challenges.	**1) Poor:** No relevant experience or evidence of past success. **2) Below Average:** Limited or poorly documented experience in similar work and/or low capacity to deliver within timeframe **3) Average:** Relevant experience with some credible evidence of impact and some capacity to deliver **4) Above Average:** Strong experience with clear and credible evidence of success and capacity to deliver within timeframe **5) Excellent:** Proven expertise and high capacity with robust evidence or achieving impact in similar contexts
	8. Timely	… can be articulated in a clear and succinct investment proposal within 3 months and delivered within 12 to 18 months.	**1) Poor:** Unclear or unrealistic timeframe for proposal development and implementation. **2) Below Average:** Some indication of feasibility but with weak timeline or readiness. **3) Average:** Feasible within the expected timeframe with some risk. **4) Above Average:** Well-scoped proposal and project likely to be completed on time. **5) Excellent:** Highly credible plan and strong evidence of ability to deliver on time.

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Thank you