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Some slides include presenter notes. You will find them at the bottom of the screen when in “normal mode.” Or go to “View” and “Notes Page.”

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CONTINUOUS IMPROVEMENT

Resources Available from the Leap Ambassadors Community – October 2019
LEAP AMBASSADORS

The Leap of Reason Ambassadors Community is a private community of nonprofit thought leaders, leader practitioners, forward-looking funders, policymakers, and instigators who believe that mission and performance are inextricably linked.
**VISION:** We imagine a social sector in which all nonprofits with the will to achieve greater impact have the strength and support to do so.

**MISSION:** Convince social-sector leaders to invest in continuous improvement so nonprofits can achieve more meaningful, measurable, and financially sustainable results.

**ASPIRATION:** By 2024, grow a larger, more engaged, and more inclusive community of Leap Ambassadors who are individually and collectively contributing to a more-effective social sector.
OUR RESOURCES

Producing meaningful, measurable, and financially sustainable results is hard. The Performance Imperative and the Performance Practice can help.

Definition
The meaning of high performance

Disciplines
The Performance Imperative, a framework for social-sector excellence

Behaviors
The Performance Practice, an approach for putting the framework into action
What is a High-Performance Organization?
High performance is the ability to deliver—over a prolonged period of time—meaningful, measurable, and financially sustainable results for the people or causes the organization is in existence to serve.
The Seven Disciplines of High-Performance Organizations
THE PERFORMANCE IMPERATIVE

PILLAR 1: Courageous, adaptive executive and board leadership

PILLAR 2: Disciplined, people-focused management

PILLAR 3: Well-designed and well-implemented programs and strategies

PILLAR 4: Financial health and sustainability

PILLAR 5: A culture that values learning

PILLAR 6: Internal monitoring for continuous improvement

PILLAR 7: External evaluation for mission effectiveness

High performance is the ability to deliver—over a prolonged period of time—meaningful, measurable, and financially sustainable results for the people or causes the organization is in existence to serve.

performanceimperative.org
TO WHAT END?

The seven pillars are the pathway to high-performance—that is the ability to deliver meaningful, measurable, and financially sustainable results for the people or causes you serve.
KEY FEATURES OF THE PERFORMANCE IMPERATIVE

+ It defines what a high-performance organization is
+ It places preeminent importance on leadership
+ It recognizes that culture and people are key to performance, continuous learning, and improvement
+ It blends disciplined execution, people focus, and data-driven decision-making
+ It identifies external evaluation as essential to operational performance
+ It focuses on organizations overall (not just programs)
“Who is responsible for making sure the baby does not become the fourth generation of victims? It was my responsibility. But I had no way of knowing if we were moving our clients closer to that goal.”

Matt Huckabay, Executive Director
PILLAR 2: WINGS FOR KIDS

Wings leader Juan needed to improve on four out of five core skills. Thanks to disciplined coaching, he completed the school year, stayed on for another year, and was even promoted.
PILLAR 3: YOUTH VILLAGES

Pat Lawler was disappointed in the outcomes after kids left Youth Villages' residential facilities.

After reengineering its program mix, the organization was able to produce twice the outcomes of comparable programs – at one third the cost.
PILLAR 4: FIRST PLACE FOR YOUTH

“A disciplined practice of raising 20% of the organization’s budget in unrestricted funds gives First Place for Youth the flexibility to allocate resources where they are needed most, when they are needed most.”

Sam Cobbs, Former CEO
PILLAR 5: THE DC PROMISE NEIGHBORHOOD INITIATIVE

The DC Promise Neighborhood Initiative (DCPNI) nurtured a culture of learning among partners, parents and students. The Every Day Counts partnership reduced chronic absenteeism in preschoolers by 21 percentage points and in K-5 students by 7 percentage points.
PILLAR 6: LATIN AMERICAN YOUTH CENTER

“We were changing attitudes toward domestic violence in the wrong direction. If it weren’t for our data collection, we would never have found out that we were doing harm. But we did, and we were able to improve the program.”

Isaac Castillo, former Director of Learning and Evaluation

Photo: Latin American Youth Center
PILLAR 7: CENTER FOR EMPLOYMENT OPPORTUNITIES

CEO reduced recidivism by 16 to 22 percent compared to a randomized control group. None of the other programs evaluated had any effect on recidivism.

Photos: Center for Employment Opportunities
WHAT DIFFERENTIATES THE PERFORMANCE IMPERATIVE?

**It's collaborative.** 60+ co-creators—practitioners, funders, and thought leaders. Not driven by one organization’s agenda.

**It's rigorous.** Not watered-down committee product. Sets high bar for those who want to achieve results beyond what would have happened anyway.

**It's comprehensive.** We’ve all seen materials on each of the 7 pillars. The PI brings all together in one coherent whole, greater than sum of parts.

**It’s clear and succinct.** Actionable detail but blissfully jargon-free.
Assess mission effectiveness in living up to their fiduciary responsibility

Use for strategic plans, professional development efforts, and organizational review

Spark introspection on ways to fund and support high performance

Add to syllabus and relevant courses

Help nonprofits plan, build, grow, learn, and improve

PUT THE PERFORMANCE IMPERATIVE TO WORK
BEHAVIORS

The Performance Practice, an Approach for Putting the Performance Imperative into Action
Benefits of the Performance Practice:

- Benefit from the brainpower of 50+ nonprofit practitioners, researchers, funders, consultants
- Uncover “hidden” strengths and opportunities to improve
- Disrupt complacency
- Engage in an improvement initiative on your own terms
- Learn and improve, no matter your budget
HOW THE PERFORMANCE PRACTICE IS DIFFERENT

- Focuses on supporting leaders who seek high performance
- Proof points stem from the collective wisdom of 50+ experts
- Dovetails with the Performance Imperative
- Jargon-free language
- Free
- Guides internal dialogue
GET STARTED

- Step 1: Define the Learning Session
- Step 2: Prepare Your Team
- Step 3: Complete The Performance Practice
- Step 4: Review The Responses
- Step 5: Share The Data With Staff
- Step 6: Learn and Improve
- Step 7: Repeat
<table>
<thead>
<tr>
<th>PROOF POINT</th>
<th>RATING</th>
<th>RATIONALE / EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Principle 1.1:</strong> Executives and boards embrace their responsibility to deliver meaningful, measurable, and financially sustainable results for the people or causes the organization is in existence to serve.</td>
<td></td>
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</tr>
<tr>
<td>1.1.1: My organization's executives and board have formally documented that they are mutually responsible for ensuring strong performance and their respective roles in achieving it; furthermore, they have fully committed to and accepted these roles and responsibilities.</td>
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<tr>
<td>Choose One</td>
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<tr>
<td>1.1.2: Through a formal process, my organization's executives and board assess themselves individually and collectively, at least once a year, to hold themselves accountable for delivering strong results.</td>
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<tr>
<td>Choose One</td>
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<tr>
<td><strong>Principle 1.2:</strong> Boards are strong, assertive governors and stewards, not just accountable the lead executive (CEO). They ask probing questions about whether when course correction is needed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.2.1: My organization's executives and board identify and prioritize the diverse skills and backgrounds we need on our board for producing meaningful results—and use this as guidance for recruiting and vetting prospective board members.</td>
<td></td>
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<tr>
<td>Choose One</td>
<td></td>
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<tr>
<td>1.2.2: Through strong board orientation and engagement processes, my organization encourages board members to ask probing questions and provide constructive pushback on the CEO.</td>
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<tr>
<td>Choose One</td>
<td></td>
<td></td>
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<tr>
<td>1.2.3: My organization's board meetings are data-informed, provide reports on results, and allow for in-depth discussions on major strategic issues.</td>
<td></td>
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<tr>
<td>Choose One</td>
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<tr>
<td>1.2.4: My organization's board reviews our CEO's performance annually and uses this process to help set goals for the coming year. This review includes a self-assessment by the CEO, an assessment by the governance committee, input from the full board, and insights from staff (not necessarily</td>
<td></td>
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<tr>
<td>Choose One</td>
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</tr>
</tbody>
</table>

- [Organizational Information]
- [Taking the Assessment]
- [Pillar 1]
- [Pillar 2]
- [Pillar 3]
- [Pillar 4]
- [Pillar 5]
- [Pillar 6]
- [Pillar 7]
- [Plans for Improvement]
- [Full Glossary]
USER GUIDE & REPORTING APP

1. LEARN
   USER GUIDE
   Introduction to the Performance Practice, acknowledgments, application, and development methodology
   Download File

2. COLLECT DATA
   WORKSHEET
   Use this worksheet to complete the self-assessment.
   Download File

3. REVIEW RESULTS
   REPORTING APP
   The reporting app compiles your results - no manual aggregation required!
   - Windows Instructions
     Windows Reporting App
   - MacOS Instructions
     MacOS App, up to v10.12/Sierra
     MacOS App, v10.13+/High Sierra
   Watch: Reporting App Guide
**REPORT: THE RATINGS**

### PILLAR 1: Courageous, adaptive executive and board leadership

<table>
<thead>
<tr>
<th>Principle / Proof Point</th>
<th>Not Started</th>
<th>Partially Met</th>
<th>Substantially Met</th>
<th>Fully Met</th>
<th>Not Sure</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principle 1.4: Executives and boards recruit, develop, engage, and retain the talent necessary to deliver on this mission. They know that great talent is a huge differentiator between organizations that are high performing and those that aren't.</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.4.1: My organization's CEO is deeply and personally engaged in talent recruitment and development, with an eye toward strengthening our talent base at every opportunity.</td>
<td>0</td>
<td>4</td>
<td>5</td>
<td>2</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>1.4.3: My organization applies professional-development and compensation practices that reflect the importance of cultivating and keeping great talent—and the disproportionate cost of losing it.</td>
<td>0</td>
<td>10</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Principle 1.6: Executives and boards passionately push the organization to get better at meeting its mission and to reduce costs without compromising quality.</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>1.6.2: My organization's executives regularly and rigorously analyze how we are deploying all resources—not just money but also people, time, energy, and focus—with an eye toward shifting resources to those areas that can have the greatest impact.</td>
<td>1</td>
<td>6</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Principle 1.7: Executives and boards are humble enough to seek and act on feedback on their own performance and that of their organization. Even the highest of high performers know that they haven't figured it all out and acknowledge that they still have a lot of work to do.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.7.1: My organization's leaders are not just receptive to feedback; they actively seek it out from staff, beneficiaries, other external stakeholders, internal performance data, and external evaluations.</td>
<td>1</td>
<td>2</td>
<td>6</td>
<td>3</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1.7.2: My organization's leaders acknowledge publicly where we need to improve and what we still need to understand better if we are to realize the results we seek.</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Principle 1.8: Executives and boards are constantly assessing not only what the organization should be doing but also what it should stop doing, with an eye to redirecting scarce resources to the highest-opportunity areas.</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>1.8.1: My organization can cite specific cases in which we have cut back or eliminated efforts we found to be ineffective, redundant, or unsustainable and/or redirected resources to areas of greater opportunity.</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>

**Distribution of ratings across all proof points**

- Not Started: 6
- Partially Met: 28
- Substantially Met: 23
- Fully Met: 10
- Not Sure: 10
- Not Applicable: 5
## REPORT: THE COMMENTS

### PILLAR 1: Courageous, adaptive executive and board leadership

#### Principle / Proof Point

<table>
<thead>
<tr>
<th>Name</th>
<th>Rating</th>
<th>Rationale / Explanation</th>
<th>Themes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jenny</td>
<td>Partially Met</td>
<td>There has been significant turnover in staff and only recently has the quality of staff been up to standards for this organization.</td>
<td></td>
</tr>
<tr>
<td>Billy</td>
<td>Partially Met</td>
<td>The CEO asks the staff about processes and how they can be better in the future.</td>
<td></td>
</tr>
<tr>
<td>Ashley</td>
<td>Substantially Met</td>
<td>I believe that our CEO has worked hard to ensure that the appropriate people are in place to assist our clients. We have had to recently hire new staff and did so very diligently.</td>
<td></td>
</tr>
<tr>
<td>Jenny</td>
<td>Partially Met</td>
<td>There are often opportunities to go to training for the programming that is delivered at the organization. However, more staff should be trained on how to handle mental health crises. There have been several negative instances where clients with several mental health issues and the staff is unprepared to handle issues.</td>
<td></td>
</tr>
<tr>
<td>Billy</td>
<td>Not Sure</td>
<td>I am not sure on this piece due to me still being new to the organization.</td>
<td></td>
</tr>
<tr>
<td>Ashley</td>
<td>Partially Met</td>
<td>No health insurance is a risk in retention of staff and compromises ability to attract new talent because competitor’s usually offer it.</td>
<td></td>
</tr>
</tbody>
</table>

#### Principle 1.6: Executives and boards passionately push the organization to get better at meeting its mission and to reduce costs without compromising quality.

<table>
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</thead>
<tbody>
<tr>
<td>Jenny</td>
<td>Partially Met</td>
<td>Staff skills and educational background do not match their job description and duties. Energy and focus does not exist because of conflicting organizational mandates. Some mandates from upper management appear to be “spur of the moment” and reactionary, without much consideration of the impact.</td>
<td></td>
</tr>
<tr>
<td>Billy</td>
<td>Not Sure</td>
<td>This is an area we should pay a lot more attention to. There is a lot of duplication of services, mismanagement of human capital, our CEO takes on too many projects at once, and gets set in his way about how resources should/have been allocated. I believe his intentions are to become better at this however; he’s focused on too many things to really be efficient at any one thing.</td>
<td></td>
</tr>
<tr>
<td>Ashley</td>
<td>Partially Met</td>
<td>We don’t have a very active board of directors.</td>
<td></td>
</tr>
</tbody>
</table>

#### Principle 1.7: Executives and boards are humble enough to seek and act on feedback on their own performance and that of their organization. Even the highest of high performers know that they haven’t figured it all out and acknowledge that they still have a lot of work to do.

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Yes, these discussion-based approaches will take longer, but we believe the benefits are worth the time.
“It’s a wonderful opportunity to celebrate how far we’ve come, and to validate the trajectory we are already on. [It is] also helpful to make sure we are considering all of the right questions and next steps to achieve our goals.”

Terri Sorensen, CEO, Friends of the Children
“What I like best about the Performance Practice is that it’s non-judgmental and opens the door for candid conversations. It helped us discuss organizational strengths and weaknesses openly and honestly.”

Kevin Jones
Former Executive Director
Urban Coalition for HIV/AIDS Prevention Services
Pittsburgh Peer Learning Circles

“Too often, we think that expertise lies outside our communities; we don’t always consider how much expertise lies within our communities or make a concerted effort to bring it out. That’s vitally important to the success of a regional initiative like this one.”

Don Goughler
Executive-in-Residence
Forbes Funds
Einhorn Family Charitable Trust

“The Performance Practice helps our partners reflect on their organizations’ progress and challenges over time, so we can have open and objective conversations about their needs, as well as where and how we can best support their work.”

Jennifer Hoos Rothberg
Executive Director
Einhorn Family Charitable Trust
THANK YOU!