

THE SOCIAL PROFIT HANDBOOK

The Essential Guide to Setting Goals,
Assessing Outcomes, and Achieving Success
for Mission-Driven Organizations

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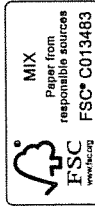
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4

Mission Time

WHERE DO WE BEGIN WITH FORMATIVE ASSESSMENT? I used to think the proper starting point was developing clarity about mission, goals, and criteria for success. But experience working closely with scores of organizations has convinced me otherwise. Now I think we need to begin with *time*. Just as we stepped back and considered the word *assessment*, we need to ask how we consciously and unconsciously think about time.

There's a line in Aldous Huxley's novel *Brave New World* that I love. It occurs at the end of a chapter, when the character known as the Savage has undergone a ritual manhood initiation, a kind of mock crucifixion, and he collapses to the ground. Huxley writes, "He had discovered Time and Death and God." Yes! That is exactly where time belongs, on a list with death and God—things that are beyond human control, and perhaps human comprehension. Yet time is the most important resource we have in our work; it is the essential currency of our lives.

A generation ago, in his book *The 7 Habits of Highly Effective People*, Stephen Covey presented a helpful way of thinking about time—the Urgent/Important matrix. He created four quadrants, as shown in table 4.1, and asked readers where they generally spend their time.

Table 4.1: The Covey Matrix

	URGENT	NOT-URGENT
IMPORTANT	Quadrant I: Everything is Important and Urgent	Quadrant II: Everything is Important but not Urgent
NOT IMPORTANT	Quadrant III: Nothing is Important but matters are still Urgent	Quadrant IV: Matters are neither Important nor Urgent

The vast majority of people who work in the social profit sector say their work lives are based in Quadrant I. Most of their efforts, driven by mission, meaning, and values, feel important. But they also feel urgent, if not late and overdue. The social needs their organizations address are pressing, even overwhelming, and there sometimes seems to be barely enough time to breathe. Quadrant I is the burn-out quadrant.

People in my workshops say that when they are not in Quadrant I, they are in Quadrant III, dealing with tasks that don't feel important to them but are urgent for someone else. This is a demoralizing quadrant. Occasionally, they admit, they retreat to Quadrant IV, which often involves some combination of a sofa, alcohol, and cable television. You get fired if you spend too much time in this quadrant. That leaves Quadrant II. Covey asks if we could just do one or two things more consistently in our personal lives, what would they be? Whenever I have asked that question, people say the same things: exercise; reading for pleasure; spending time with a spouse or partner; keeping in touch with old friends; having a hobby. They are all Quadrant II activities.

Are they important? Yes. Are they urgent? No. That's why we don't get to them. When asked why we don't do these things more often, we answer, "Because I don't have enough time." But Covey's matrix helps us understand that it is really because they are not urgent. They can be put off without immediate consequences. We spend our time in Quadrants I and III because the work is, often

literally, right in our faces. Yet longer-term, our lives are diminished by not spending enough time in Quadrant II.

How do people we know actually accomplish important, non-urgent activities on a regular basis? They schedule time for them, and that time is inviolate. This is a crucial insight for my purposes, for while Covey is trying to get us to think about Quadrant II as *individuals*, I want us to think about it as organizations. *We cannot shift our thinking and practice surrounding assessment without recognizing that formative assessment is a Quadrant II activity.*

Ironically then, the first step in formative assessment has nothing to do with assessment. It is about understanding the need to designate time for the work. Again, I used to wait until the end of my workshops to raise the issue of how organizations use time. Now I begin with it. The work of creating a formative assessment tool, let alone a formative assessment system, let alone a formative assessment culture, simply will not happen unless organizations schedule time for it and protect that time from the other more urgent demands upon it. I suggest finding a name for this important-but-not-urgent time that is all your own. Maybe you could name it after a founder or a landmark or a key word in your mission. From now on, I will refer to it as *mission time* and leave it to you to personalize it from there.

I fervently believe that mission time calms you down and saves you other time in the long run. Mission time is where we can achieve thoughtful clarity about who we are, what we are going to do and not going to do, what we do best, and how we will go about it. We can ask how the world is changing around us and reflect on how we will know whether we are being successful in it.

The way the social sector works, mission time is usually scarce. Organizations are funded for projects, not operations. Strategic decisions are made by executive directors late at night instead of by working groups with time to talk through options and imagine alternative approaches. Lack of mission time, in my opinion, is why so many thoughtful and even inspiring strategic plans do not

bring about the changes they describe. The plans were created in retreat mode, but there is not ongoing time of the same quality devoted to their implementation.

I now tell people at my workshops that if the leaders of their organizations don't support identifying, protecting, and learning to use mission time, they should not bother to approach their assessment practices any differently. It would be too discouraging, even painful. Put more positively, leaders must insist on mission time, and they must be patient and help others be patient as the organization learns how to use it well. They will know they are leading an assessment culture when no one in the organization can imagine doing without it.

— Using Mission Time —

Once organizations embrace the goals of formative assessment and set aside mission time, they are on the road to more organized and targeted learning and more focused, flexible, and effective performance. I make the case in chapter 5 that one of the highest and best uses of mission time is creating new assessment tools in the form of qualitative assessment rubrics. But there are other excellent ways to spend this time together. Here are some ideas.

Gathering and interpreting information.

One of the benefits of mission time is that it allows people who work together to ask, *Is there any information we don't have that we should have?* Inevitably, the answer is yes, and then they can figure out how to get it. Surveys and questionnaires, for example, can provide excellent information on current realities, preferences, and opinions of a selected population of people. Focus groups, where you sit down with a representative group of people affected by your work, can give you very direct and helpful feedback, along with new ideas and relationships. There are numerous sources on

how to design these tools; I will just note here that the more you habitually seek and use feedback, the higher the response rate will be to surveys, and the better the food, the better the focus group. With new information at your disposal, you can use mission time to ask, *What does this tell us, and what should we do about it?*

Diagnosing the current situation.

The sturdiest exercise for determining what's going on with your organization and what needs attention is the SWOT (Strengths/Weaknesses/Opportunities/Threats) analysis. Simply ask, *At this moment in our organization's history, what are our Strengths, and what are our Weaknesses? What Opportunities do we see in the near future, and what are the potential Threats to our achieving our mission?* Have people answer these questions individually, then discuss their answers in small groups, then report out to the whole group. Patterns will emerge, and questions: *How do we maintain our strengths? How do we address our weaknesses? How do we seize the most important opportunities within our reach? How do we minimize the threats to our work?*

Having some purposeful fun.

One of my favorite uses of mission time, particularly in a retreat setting, is a planning backward exercise. This particular exercise is best done in small groups, deliberately mixing up people from different departments or, in the case of larger organizations, locations. At organizational retreats, you can have board/staff teams. Tell each group: *Imagine that five years from now, our organization is on the cover of a magazine. Choose the magazine, design the cover and headline, and write the first paragraph or two of the article.* When you compare the results, you may start to hear, "We can do that," and you will be planning backward from an ambitious vision.

All of the activities above provide information and momentum for what I believe is the single most effective use of mission

time: *designing your own assessment rubrics*. Rubrics, as you will see, define levels of performance along a spectrum, in relation to the most important criteria for success, as determined by those who know the work most intimately. Rubrics can certainly contain metrics where numbers are helpful, but they also contain words—as many of them as you need to clarify what you are trying to do and help you achieve the results you are after. They become the physical representation of a long-term commitment to formative assessment, and they provide a context for ongoing individual and organizational self-evaluation.

Organizations that embrace formative assessment also embrace the idea of local assessment design. They recognize that while some performances are defined and enhanced by standardized measures, such as number of meals served or acres preserved, there are other performances that are specific to their own mission and geography and clientele. They see the potential power and impact of customizing instruments that describe and measure the levels of performances and accomplishments to which *they* aspire, based on their own mission, values, and goals.

Here's a quick recap: Chapter 2 asks you to consider whether something that cannot be precisely quantified could nevertheless be measured. Chapter 3 asks you to consider whether assessment efforts could be focused on future performances instead of past ones. Chapter 4 asks you to consider whether naming, claiming, and protecting time for collaborative reflection on non-pressing matters could make your organization more effective. Together, those chapters set the stage for chapter 5, which asks you to consider the potential of making time for rubrics.