

**CNJG 2015 Conference
For New Jersey's Social Sector
May 19, 2015**

**Can Social Profit
Be Measured?**

Presentation by David Grant

What does it look like to
*measure what
matters?*



Principle

**The primary purpose
of assessment is
to improve performance,
not merely audit it.**

Concept

Planning Backwards

What would it
look like if we
succeeded?



What's the
difference between

**planning
ahead**

and

**planning
backwards**

?





Photo: Flickr Creative Commons User Didriks



Example: The LEED Scale

**Leadership in
Energy and
Environmental
Design**



LEED Project Check List

Project Checklist

Sustainable Sites

14 Possible Points

Y	F	N	Prereq 1	Erosion & Sedimentation Control	Required
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1	Site Selection	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 2	Urban Redevelopment	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 3	Brownfield Redevelopment	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.1	Alternative Transportation, Public Transportation Access	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.2	Alternative Transportation, Bicycle Storage & Changing Rooms	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.3	Alternative Transportation, Alternative Fuel Vehicles	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.4	Alternative Transportation, Parking Capacity	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 5.1	Reduced Site Disturbance, Protect or Restore Open Space	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 5.2	Reduced Site Disturbance, Development Footprint	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 6.1	Stormwater Management, Rate and Quantity	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 6.2	Stormwater Management, Treatment	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 7.1	Heat Island Effect, Non-Roof	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 7.2	Heat Island Effect, Roof	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 8	Light Pollution Reduction	1

Water Efficiency

5 Possible Points

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1.1	Water Efficient Landscaping, Reduce by 50%	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1.2	Water Efficient Landscaping, No Potable Use or No Irrigation	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 2	Innovative Wastewater Technologies	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 3.1	Water Use Reduction, 20% Reduction	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 3.2	Water Use Reduction, 30% Reduction	1

Energy & Atmosphere

17 Possible Points

Y	F	N	Prereq 1	Fundamental Building Systems Commissioning	Required
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prereq 2 <td>Minimum Energy Performance <td>Required</td> </td>	Minimum Energy Performance <td>Required</td>	Required
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prereq 3 <td>CFC Reduction in HVAC&R Equipment <td>Required</td> </td>	CFC Reduction in HVAC&R Equipment <td>Required</td>	Required
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1	Optimize Energy Performance	1-10
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 2.1	Renewable Energy, 5%	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 2.2	Renewable Energy, 10%	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 2.3	Renewable Energy, 20%	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 3	Additional Commissioning	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4	Ozone Depletion	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 5	Measurement & Verification	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 6	Green Power	1

Materials & Resources

13 Possible Points

Y	F	N	Prereq 1	Storage & Collection of Recyclables	Required
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1.1	Building Reuse, Maintain 75% of Existing Shell	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1.2	Building Reuse, Maintain 100% of Shell	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1.3	Building Reuse, Maintain 100% Shell & 50% Non-Shell	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 2.1	Construction Waste Management, Divert 50%	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 2.2	Construction Waste Management, Divert 75%	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 3.1	Resource Reuse, Specify 5%	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 3.2	Resource Reuse, Specify 10%	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.1	Recycled Content, Specify 5% (p.c. + 1/2 p.l.)	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.2	Recycled Content, Specify 10% (p.c. + 1/2 p.l.)	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 5.1	Local/Regional Materials, 20% Manufactured Locally	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 5.2	Local/Regional Materials, of 20% in MRC5.1, 50% Harvested Locally	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 6	Rapidly Renewable Materials	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 7	Certified Wood	1

Indoor Environmental Quality

15 Possible Points

Y	F	N	Prereq 1	Minimum IAQ Performance	Required
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prereq 2 <th>Environmental Tobacco Smoke (ETS) Control</th> <th>Required</th>	Environmental Tobacco Smoke (ETS) Control	Required
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1	Carbon Dioxide (CO ₂) Monitoring	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 2	Ventilation Effectiveness	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 3.1	Construction IAQ Management Plan, During Construction	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 3.2	Construction IAQ Management Plan, Before Occupancy	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.1	Low-Emitting Materials, Adhesives & Sealants	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.2	Low-Emitting Materials, Paints	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.3	Low-Emitting Materials, Carpet	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 4.4	Low-Emitting Materials, Composite Wood	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 5	Indoor Chemical & Pollutant Source Control	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 6.1	Controllability of Systems, Perimeter	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 6.2	Controllability of Systems, Non-Perimeter	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 7.1	Thermal Comfort, Comply with ASHRAE 55-1992	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 7.2	Thermal Comfort, Permanent Monitoring System	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 8.1	Daylight & Views, Daylight 75% of Spaces	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 8.2	Daylight & Views, Views for 90% of Spaces	1

Innovation & Design Process

5 Possible Points

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1.1	Innovation in Design	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1.2	Innovation in Design	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1.3	Innovation in Design	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 1.4	Innovation in Design	1
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit 2	LEED™ Accredited Professional	1

Project Totals

69 Possible Points

Certified 26-32 points Silver 33-38 points Gold 39-51 points Platinum 52-69 points

Tool: Rubric

**By what criteria
would we
measure
success?**

**What would
success
look like?**

**You can't
measure that!**

**If you can
describe it,
you can
measure it!**

Constructing an Analytic Scoring Rubric

This response, performance, or product provides evidence of proficiency in: _____

Traits/Criteria	1	2	3	4

**Example of a
Successful Rubric:**

GreenFaith (NJ)

What does greening
look like in all areas
of
religious/institutional
life?



GreenFaith Assessment Rubric for Religious Institutions

Area of Institutional Life	Out of the Garden	In the Wilderness	Building a New Ark	Eden Restored
1. Worship & Spirituality				
2. Religious Education				
3. Fellowship & Social Life				
4. Facility Management				
5. Social Outreach				
6. Financial Management				
7. Influence on Members, Denomination, Community				

Example of a
Successful Rubric:

Geraldine R.
Dodge
Foundation



What does a
successful site visit
look like?

**Site Visit Rubric
Quality of Preparation**

DRAFT

<p align="center">1 Poor Unacceptable</p>	<p align="center">2 OK Acceptable</p>	<p align="center">3 Our Standard: Respect for Grantees</p>	<p align="center">4 Our Goal: Exceeding the Standard</p>
<p>Regarding substance: Program officer skims proposal: - doesn't know names of key people, or who's going to be at site visit. - falls back on asking, "Would you walk me through this proposal?" - says, "Can you come to our offices by noon tomorrow?"</p>	<p>Program Officer reads Proposal and Report, has some questions prepared, knows who will be at the site visit.</p>	<p>Program Officer thoroughly reads proposal and report on last year's grant (in relation to specifics of grant letter); reviews last year's write-up to see what issues rose to the top; checks with colleagues in-house, and, when appropriate, in the field for any further background that sheds light on organizational health and/or work to be funded. PO develops questions that are not already answered in proposal.</p>	<p>PO expands own knowledge of field in appropriate way in preparation for visit and review. PO consults other supporting materials - becomes immersed in the big picture of grantee's work, aware of national trends and cycles of calendar year.</p>
<p>Regarding logistics: PO has no idea how to find their office, leaves Dodge with no directions, map, or phone number. PO relies on instinct to find the right place and ends up in Moorestown instead of Morristown. Or (other screw-ups): PO requests last-minute meeting; or shows up and they didn't know we were coming; or is late and doesn't call; or gets confused and doesn't show up at all.</p>	<p>PO arranges for site visit over the phone when it makes sense for grantee and there is little to be gained from either a face-to-face meeting (e.g. we know the grantee well or have just seen him/her)</p>	<p>Grantees get sufficient notice, choice of time for meeting, advance notice of any "major" questions or concerns, and an opportunity to invite others they think important to the meeting. We ask if there is anything they want us to see before the site visit. Grantee is clear about when we are showing up. PO leaves Dodge with all appropriate information, arrives at right place, at right time.</p>	<p>PO (or program assistant) makes phone call 2-3 days before the visit to confirm appointment and asks if there is any new information we should be aware of, or if there is anything on the grantee's mind that is not included in the proposal.</p>
<p>Other considerations: PO schedules visits so tightly that he/she arrives too fried to do the visit justice, or does not allow time to consolidate notes and understandings gained before moving on to something else.</p>		<p>We have taken time to ask whether the Right Person is doing the site visit. We want to not fall off the fine line between social and professional; if PO is a personal friend of grantee, we send someone else. We don't want <u>any</u> person to become the only contact and champion for an organization.</p>	<p>We view the relationship with grantee within a year-long cycle. More than one of us is in contact during the year; we have conversations that are not about proposals under review. We remember that funders don't have the answers and behave accordingly. We are partners with our grantees in a venture to improve society.</p>

**Site Visit Rubric
Quality of Visit and Conversation**

DRAFT

<p align="center">1 Poor Unacceptable</p>	<p align="center">2 OK Acceptable</p>	<p align="center">3 Our Standard: Respect for Grantees</p>	<p align="center">4 Our Goal: Exceeding the Standard</p>
<p>Program officer:</p> <ul style="list-style-type: none"> ■ Conveys aura of mystery about what we do and how we do it. ■ Asks questions they have already answered in the proposal. ■ Lets frustrations come out when things are not going well with the organization. ■ Takes no notes and leaves the visit with no specific info. ■ Takes a cell phone call in the middle of the visit. ■ Loses sight of grantor/grantee relationship. 	<p>Program officer</p> <ul style="list-style-type: none"> ■ Goes to them, at their convenience, on time, with appropriate attire. ■ Has informed conversation about the proposal and lets them know when they will hear from us. ■ Asks if they have any questions for us. 	<p>Program officer:</p> <ul style="list-style-type: none"> ■ Places the visit in a context: the past relationship is known and valued. ■ Asks the right questions of the right people; knows who does what and who thinks about what. ■ Is aware of Life-cycle issues, does not have the same conversation year-after-year. ■ Is clear about the process – when things happen, how many groups are being considered, when and how grantee can still communicate with us, etc. ■ Recognizes the value of grantee's time. ■ Expresses appreciation for grantee's work, regardless of outcome of specific grant proposal. ■ Takes notes sufficient enough to inform the write-up, but not so much as to not be fully present in the conversation. ("Wait a minute. That's great. I need to write that down.") ■ Clearly maintains the balance between the social and the professional. ■ Gives even more time to groups likely to be declined, so they know they have been heard. 	<p>Program officer:</p> <ul style="list-style-type: none"> ■ Intervenes and significantly changes the conversation for the better by getting to important things that need to be said. ■ Acts as a resource, or consultant, connects group to others in a helpful way, helps brainstorm about the future in a productive way. ■ Notes impressions and body language, asks "what are they trying to convey to me?"

**Site Visit Rubric
Aftermath Outcomes**

DRAFT

<p align="center">1 Poor Unacceptable</p>	<p align="center">2 OK Acceptable</p>	<p align="center">3 Our Standard: Respect for Grantees</p>	<p align="center">4 Our Goal: Exceeding the Standard</p>
<p>Program officer:</p> <ul style="list-style-type: none"> ■ Forgets about the visit. ■ Forgets to send information or names as promised during the site visit. ■ Moves on to something else with nothing to show for having made the visit. 	<p>Program officer:</p> <ul style="list-style-type: none"> ■ Makes notes sufficient enough to provide details for case for funding. ■ Follows through on any clear promises. 	<p>Program officer:</p> <ul style="list-style-type: none"> ■ Organizes impressions and understandings quickly, through dictation into tape recorder or list of bullet points. ■ Notes any "to do" items, such as promising to send a book or a reference, or promise to get grantee in touch with someone; follows through quickly on these items. ■ Keeps colleagues at Dodge informed about what's been learned, particularly regarding points that may affect other reviews. ■ Checks in with any partner organizations in work to be funded. 	<p>Program officer:</p> <ul style="list-style-type: none"> ■ Sends an e-mail or card after the visit thanking them for their time. ■ Makes effort to see the program we have learned about taking place; makes follow-up visit to observe first-hand what was talked about during the site visit. ■ Follows up not only on promised connections but also thinks, "who else should this grantee know about?"; makes connections, even cross-sector. ■ Calls others in the field who are connected to or affected by grantee's work, so as to incorporate those views and perspectives into the write-ups for the Board.

Your Rubric

	1	2	3
?			
?			

What Rubrics Do We Need?

Is there a **core performance** in the work of our organization, one that would benefit from **being described specifically** so that people can get better at it?

What Rubrics Do We Need?

Are there **key words** in our mission, goals, or strategies that inspire us to ask, “**What would that look like if we succeeded?**”

What Rubrics Do We Need?

Is there something that **matters a lot** to us that **resists quantification** and measurement?

What Rubrics Do We Need?

Are there **people** in our organization who **need feedback** on something important?

What Rubrics Do We Need?

Is there **something we need to talk about**, and should talk about, that we **haven't found a way yet** to talk about?

What Rubrics Do We Need?

Is there an **essential question** to our work, one where we need a **vehicle for ongoing discussion**?

What Rubrics Do We Need?

Is there a **job description** in our organization that would benefit from being **examined from the multiple perspectives** of people who are affected by that person's performance?

Contributions and Commitments

	Minimal	OK	Maximum
Board of Trustees			
Other Volunteers			
Artistic staff			
Administrative staff			
Part-time staff			
Consultants			
Donors			

Effective Boards

	Less effective	Effective	Most effective
Who Board Members ARE			
What TRAITS they have			
What Board members DO			

What do Trustees *DO*?

	Low	Middle	High
At meetings			
Between meetings			
In community			
In relation to ED			

Your Rubric

	1	2	3
?			
?			

Observation

The **later** an organization made performance measurement part of its culture, the **more disruptive** the process was.

From Michael Fullan
The Six Secrets of Change

- ... What the Best Leaders Do to Help Their Organizations **Survive and Thrive**

Fullan: Secret #1

**Love Your
Employees**

Fullan: Secret #2

**Connect
Peers with
Purpose**

Fullan: Secret #3

**Capacity
Building
Prevails**

Fullan: Secret #4

**Learning is
the Work**

Fullan: Secret #5

Transparency Rules

Fullan: Secret #6

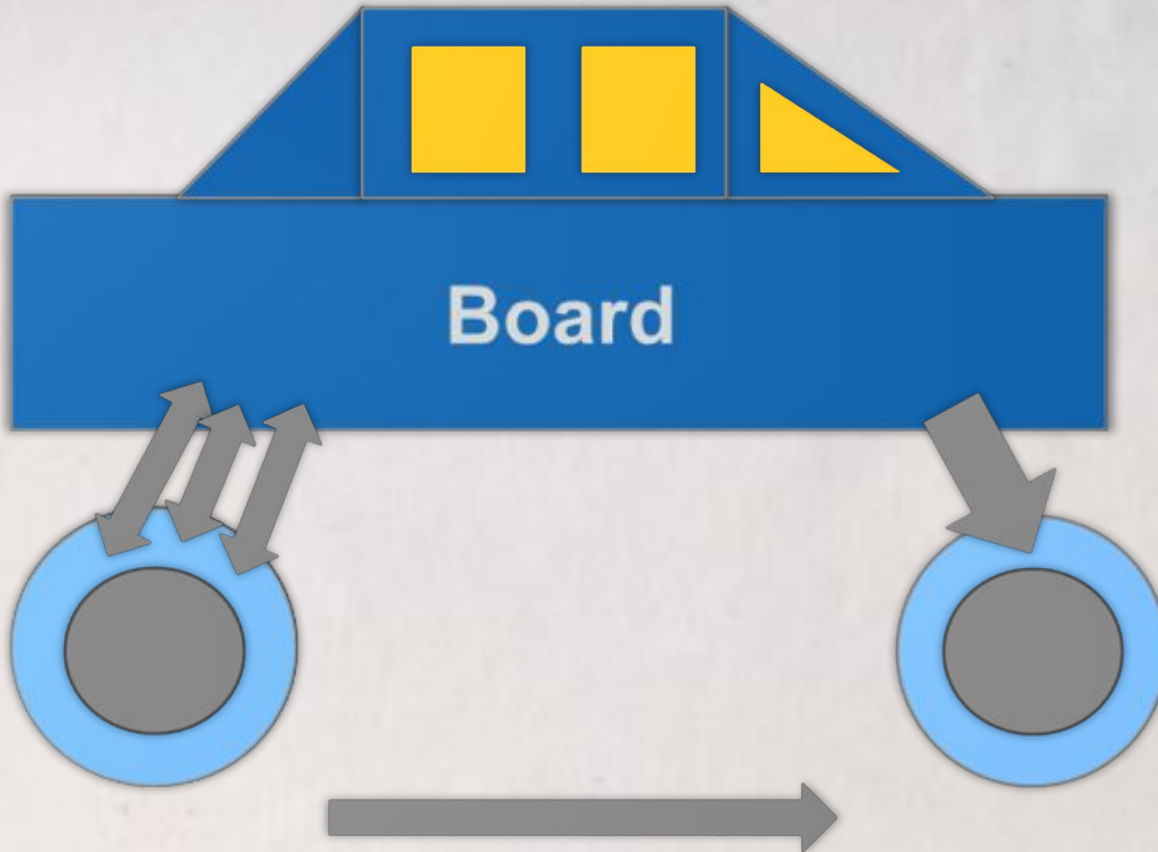
**Systems
Learn**

The Covey Matrix

	urgent	not urgent
important	I	II
not important	III	IV

Golden Circles

Board/Staff Drive



From xxxx

Golden Circles




From Simon Sinek

Golden Circles

Board/Staff Drive

Design Thinking



The diagram consists of three overlapping circles on a light gray background. The top-left circle is light blue and labeled 'desirability'. The top-right circle is a darker blue and labeled 'viability'. The bottom circle is dark brown and labeled 'feasibility'. All circles have a thick yellow border. The circles overlap in the center, creating a central intersection area.

desirability

viability

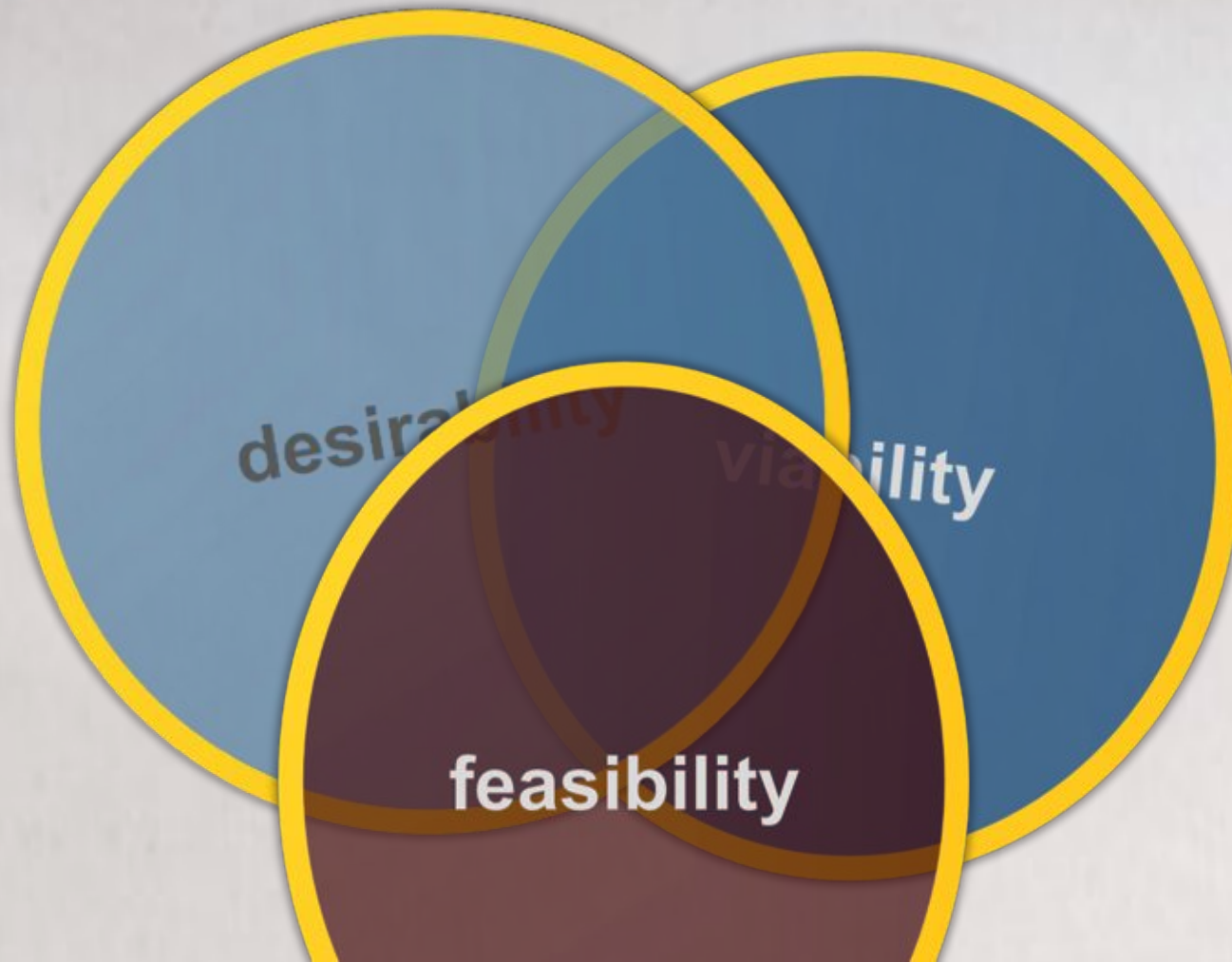
feasibility

From Tim Brown,
Change by Design

Golden Circles

Board/Staff Drive

Design Thinking



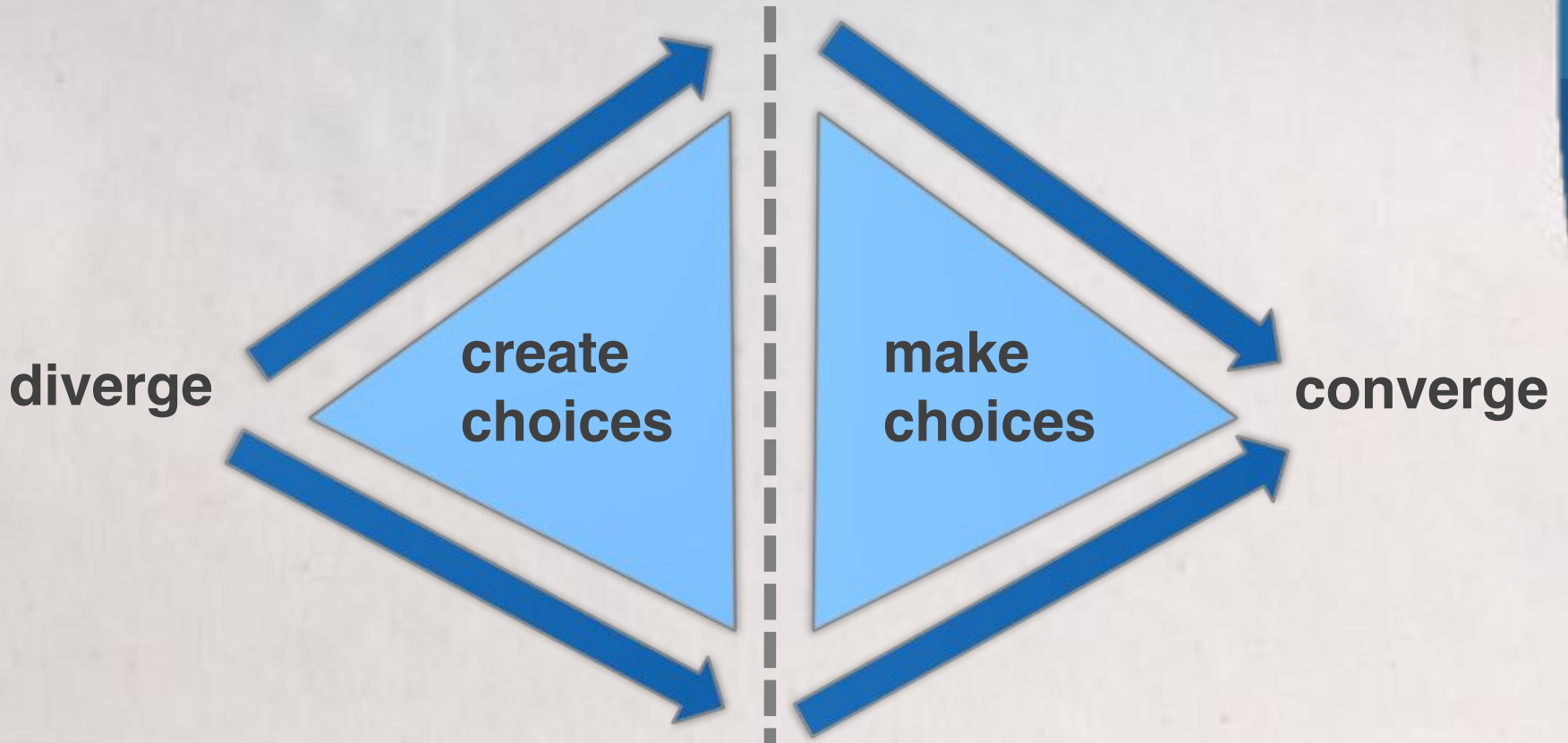
From Tim Brown,
Change by Design

Golden Circles

Board/Staff Drive

Open Thinking

Divergence/Convergence

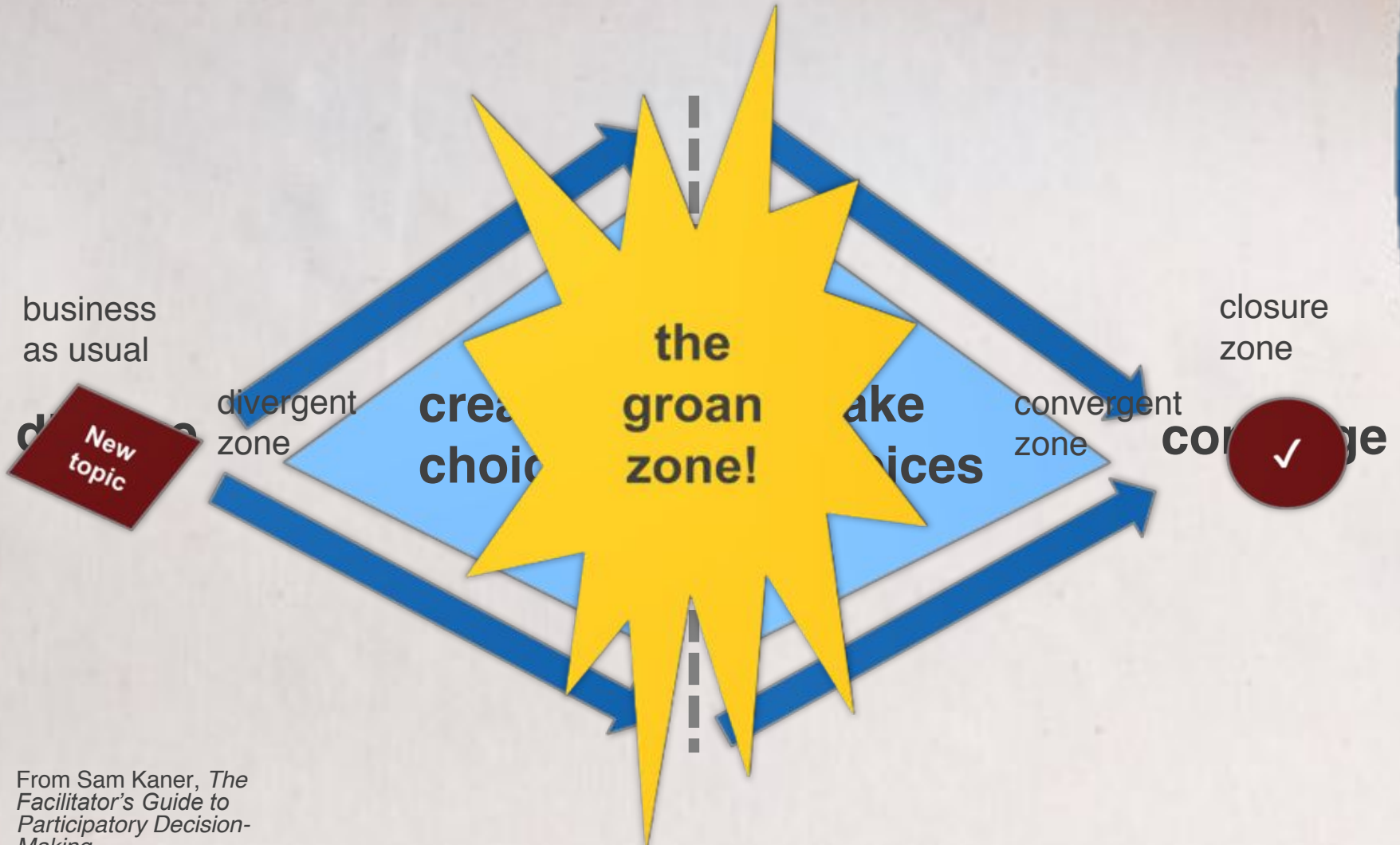


Golden Circles

Board/Staff Drive

Open Thinking

Divergence/Convergence



From Sam Kaner, *The Facilitator's Guide to Participatory Decision-Making*

What
gets in the
way
of this work?



The Covey Matrix

	urgent	not urgent
important	I	II
not important	III	IV

Beckhard's Change Model

Vision < Resistance

? > Resistance

Vision x

First Steps x

Dissatisfaction with Status Quo >

D x V x F > R

Effective Assessment:

D x V x F > R

IS a FIRST STEP

Sharpens VISION

Increases DISSATISFACTION

Reduces RESISTANCE

**Effective thinking
about
assessment makes change
more likely**

Adding to the Change Model

$$D \times V \times F > R$$

Plus LEADERSHIP

$$D \times V \times F \times L > R$$

Acknowledgements

Susan Stevens; Tim Brown; Steven Covey; Simon Sinek; Sam Kaner.

Questions? Comments?

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