



# Practicing High Performance

Tools, Guidance, and Lessons for Social Sector Leaders

AEA 2019

# Objectives

1. Define high performance and introduce free, helpful resources to support and sustain it
2. Provide tangible examples of high performance in practice at two large youth-serving nonprofits
3. Reflect on our experiences trying to strengthen organizations, and identify practical steps to take with our teams/clients after AEA



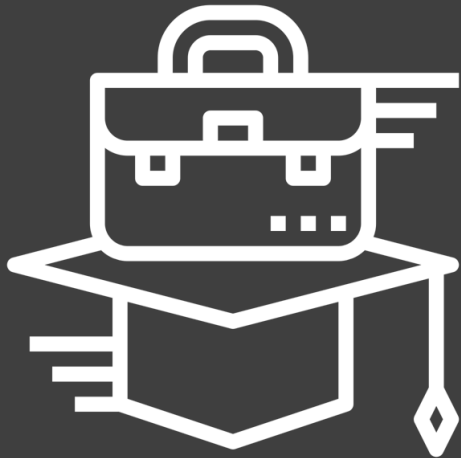


What does a high-performing organization look like?

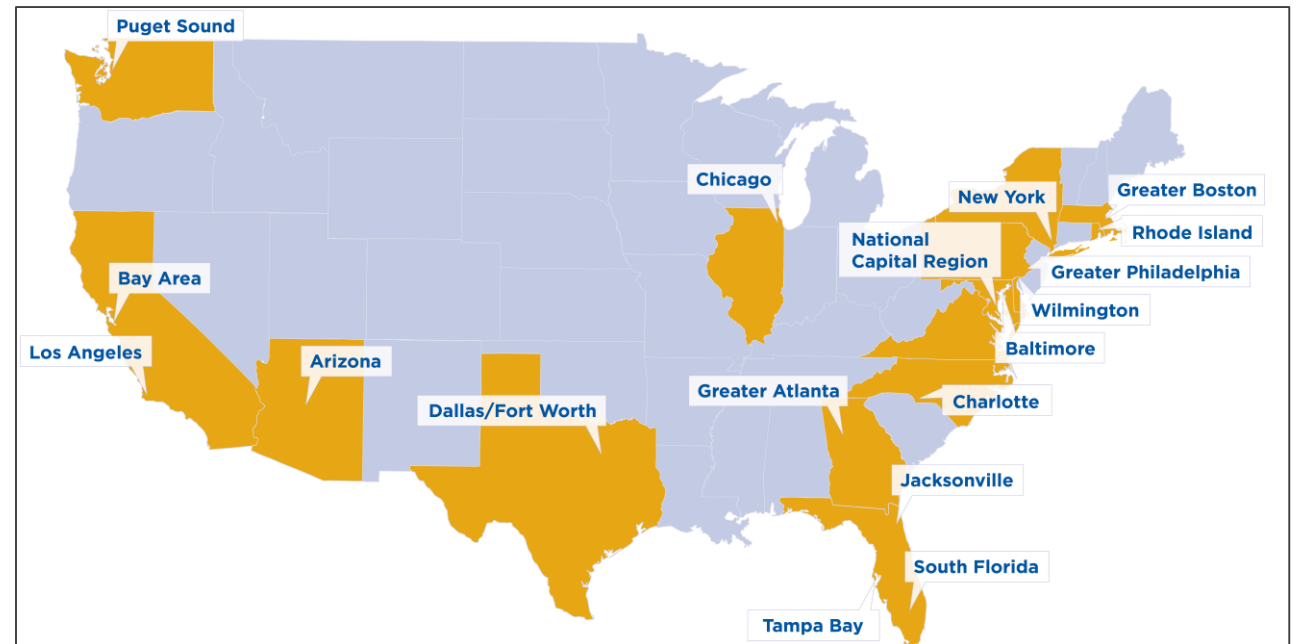
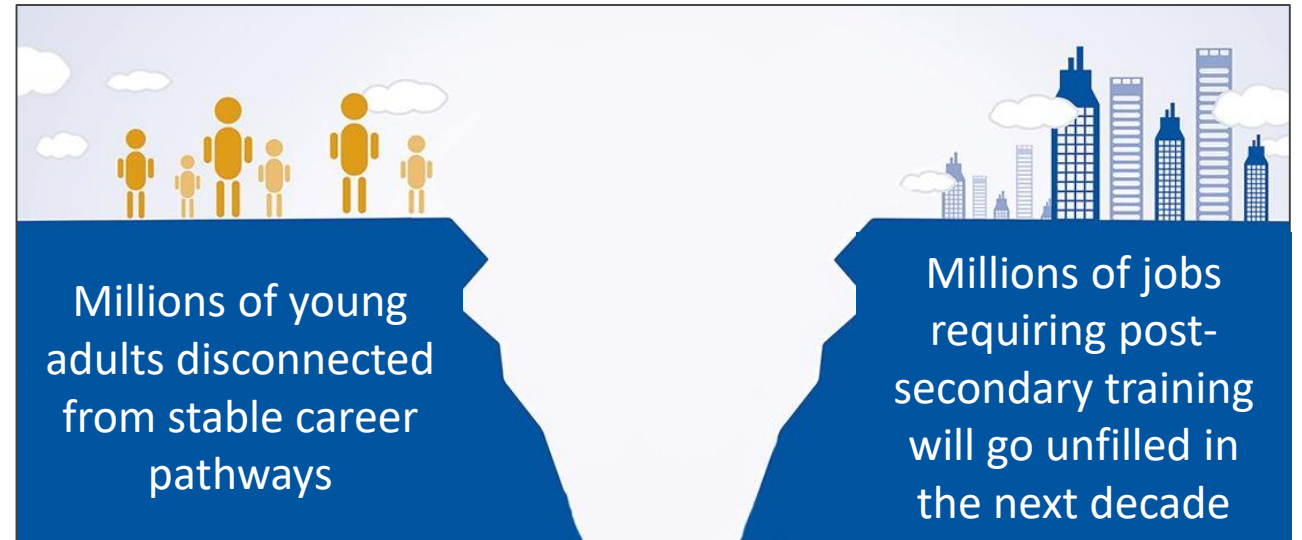
Does that organization value learning?



**6-month  
paid internship**



**6-month  
classroom training**





**4.5 MILLION:** The number of young people in this country who are neither in school nor working.

Over the last 20 years, **Urban Alliance** has become one of the leading advocates of youth employment programming targeting high school students. The main elements of our programming include:

Skills



Mentors



Internships





HARVARD  
UNIVERSITY



UNIVERSITY OF  
NOTRE DAME



THE ANNIE E. CASEY FOUNDATION



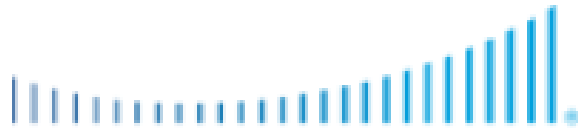
Robert Wood Johnson Foundation



Arnold  
Ventures



THE CENTER  
FOR EFFECTIVE  
PHILANTHROPY



The Bridgespan Group

MISSION

PERFORMANCE



Big Brothers Big Sisters



URBAN

Youth VILLAGES®







## **Definition**

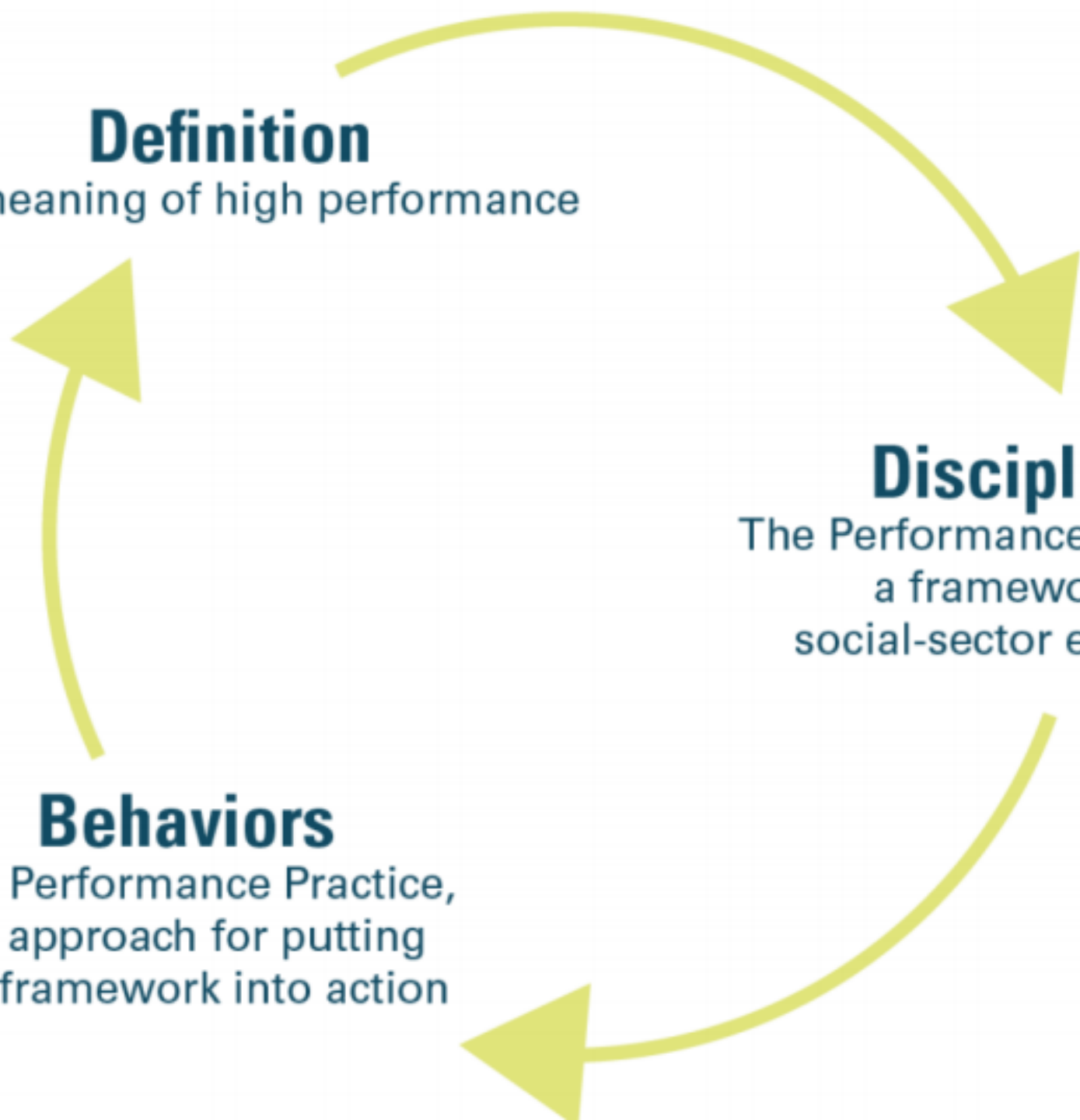
The meaning of high performance

## **Disciplines**

The Performance Imperative,  
a framework for  
social-sector excellence

## **Behaviors**

The Performance Practice,  
an approach for putting  
the framework into action



# high performance **adjective**

## **Definition of *high performance***

: 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.

*// high-performance organizations*



# OPERATIONALIZING HIGH PERFORMANCE

# STEP 1: GETTING STARTED

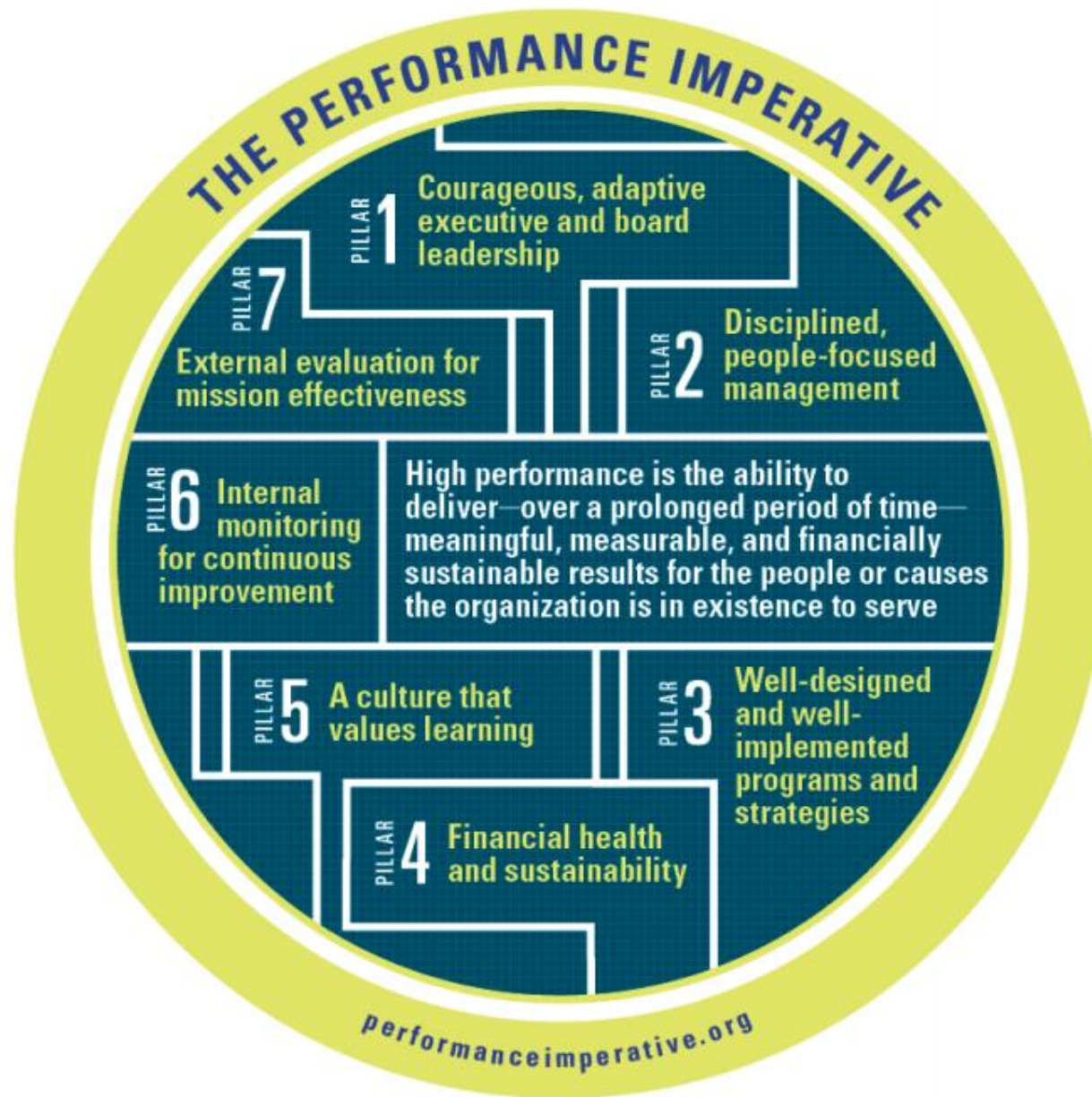
1. Recognize that ALL organizations are all on the journey.
2. Anyone can start the conversation.
3. Buy-in matters, but consensus can be hard to obtain.



# STEP 2: IDENTIFY STRENGTHS AND GAPS

1. Performance Imperative
2. Performance Practice





# LEAP OF REASON PERFORMANCE PRACTICE

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

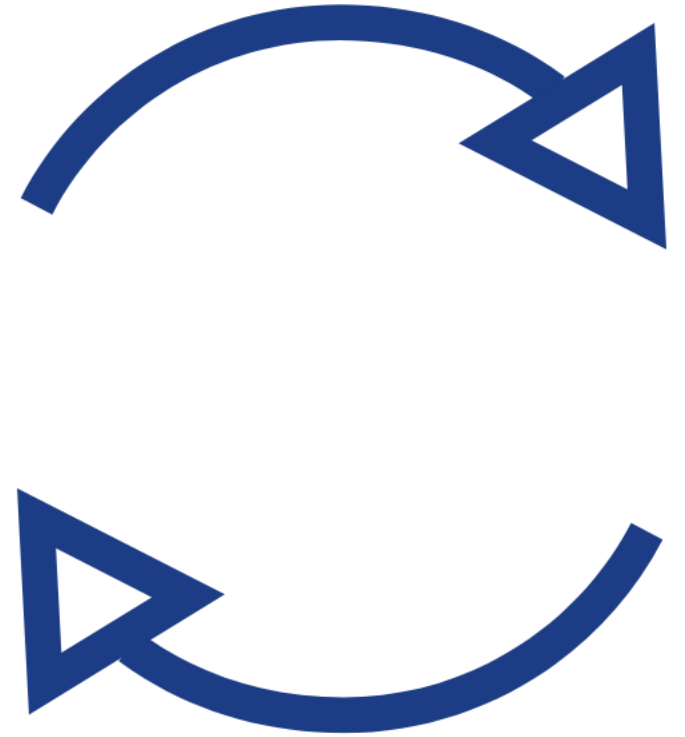
MacOS App, v10.13+/High Sierra

Watch: Reporting App Guide

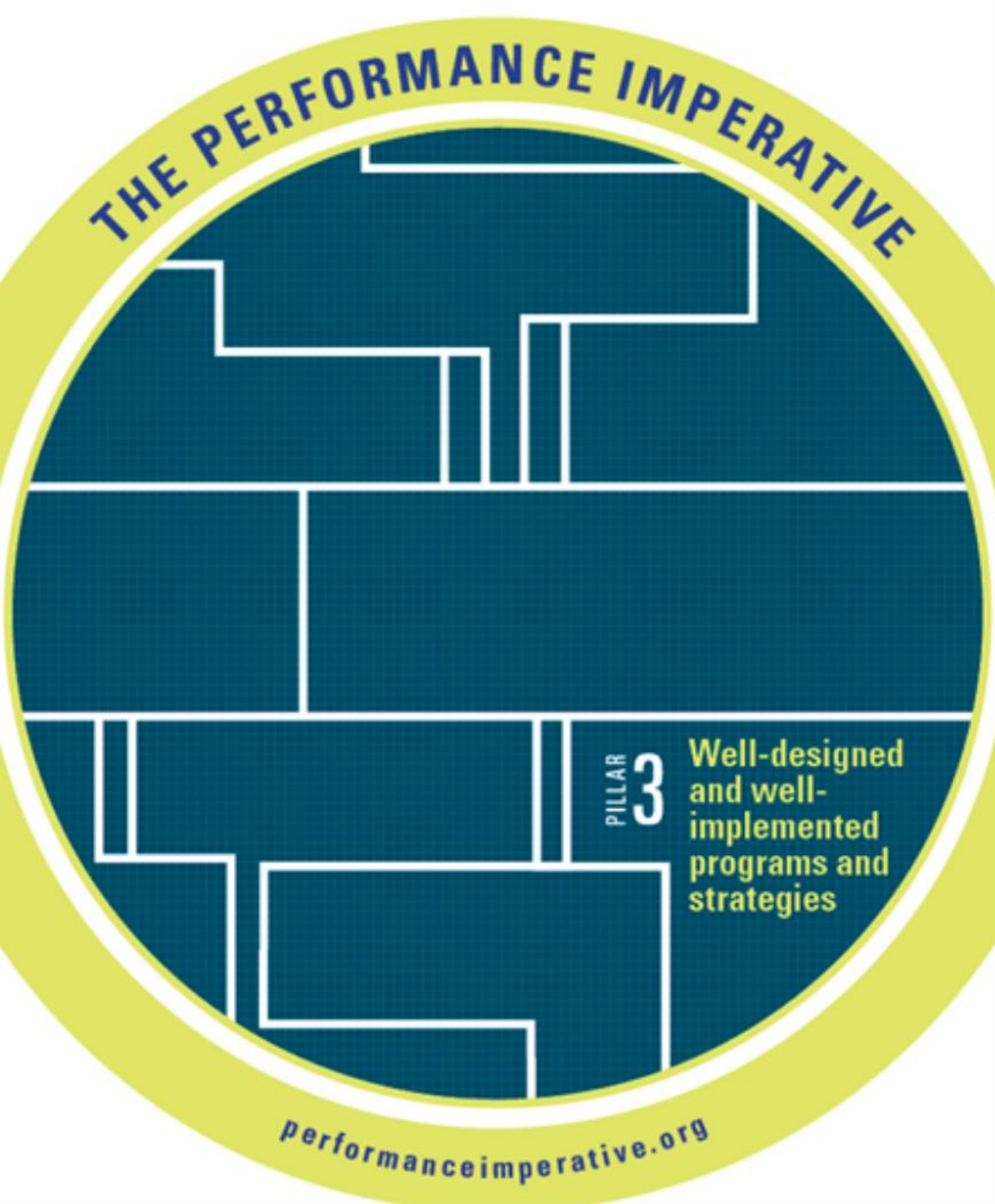
Organization Name Enter Participant Name(s)		Description Enter Date
PROOF POINT	RATING	RATIONALE / EXPLANATION
Principle 1.1: Executives and boards embrace their responsibility to deliver meaningful, measurable, and financially sustainable results for the people or causes the organization is in existence to serve.		
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.	Choose One	
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.	Choose One Not Started Partially Met Substantially Met Fully Met Not Sure Not Applicable	
Principle 1.2: Boards are strong, assertive governors and stewards, not just accountable the lead executive (CEO). They ask probing questions about when course correction is needed.		fundraisers. They recruit, advise, and hold in is living up to its promises and acknowledge
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.	Choose One	
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.	Choose One	
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.	Choose One	
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	Choose One	
Organizational Information   Taking the Assessment   Pillar1   Pillar2   Pillar3   Pillar4   Pillar5   Pillar6   Pillar7   Plans for Improvement		

## STEP 3: MONITOR AND ITERATE

Leap's pillars and tools are modular and can be taken individually.







# PILLAR THREE

Well-Designed Programs  
and Strategies

## PILLAR 3: WELL-DESIGNED PROGRAMS AND STRATEGIES

- Clear Target Population
- Evidence-based Program Design
- Careful Understanding of Ecosystem
- High Fidelity
- Participant Informed
- Relationship Based
- Mission Commitment



# **PILLAR 3: URBAN ALLIANCE**

**UA always had a  
compelling story.**

But purposely monitoring data  
solidified our program design,  
leading to improved outcomes  
and program expansion.





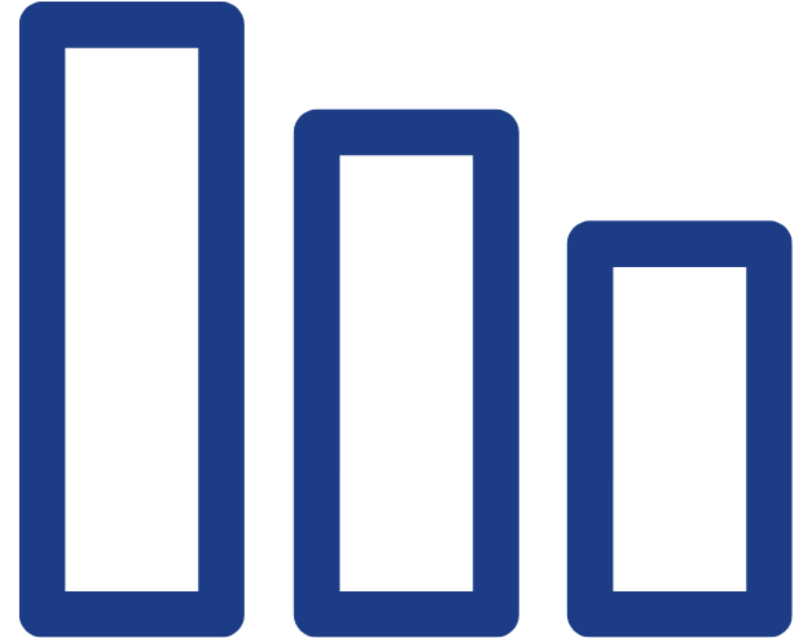


# PILLAR SIX

## Monitoring for Continuous Improvement

## PILLAR 6: MONITORING FOR CONTINUOUS IMPROVEMENT

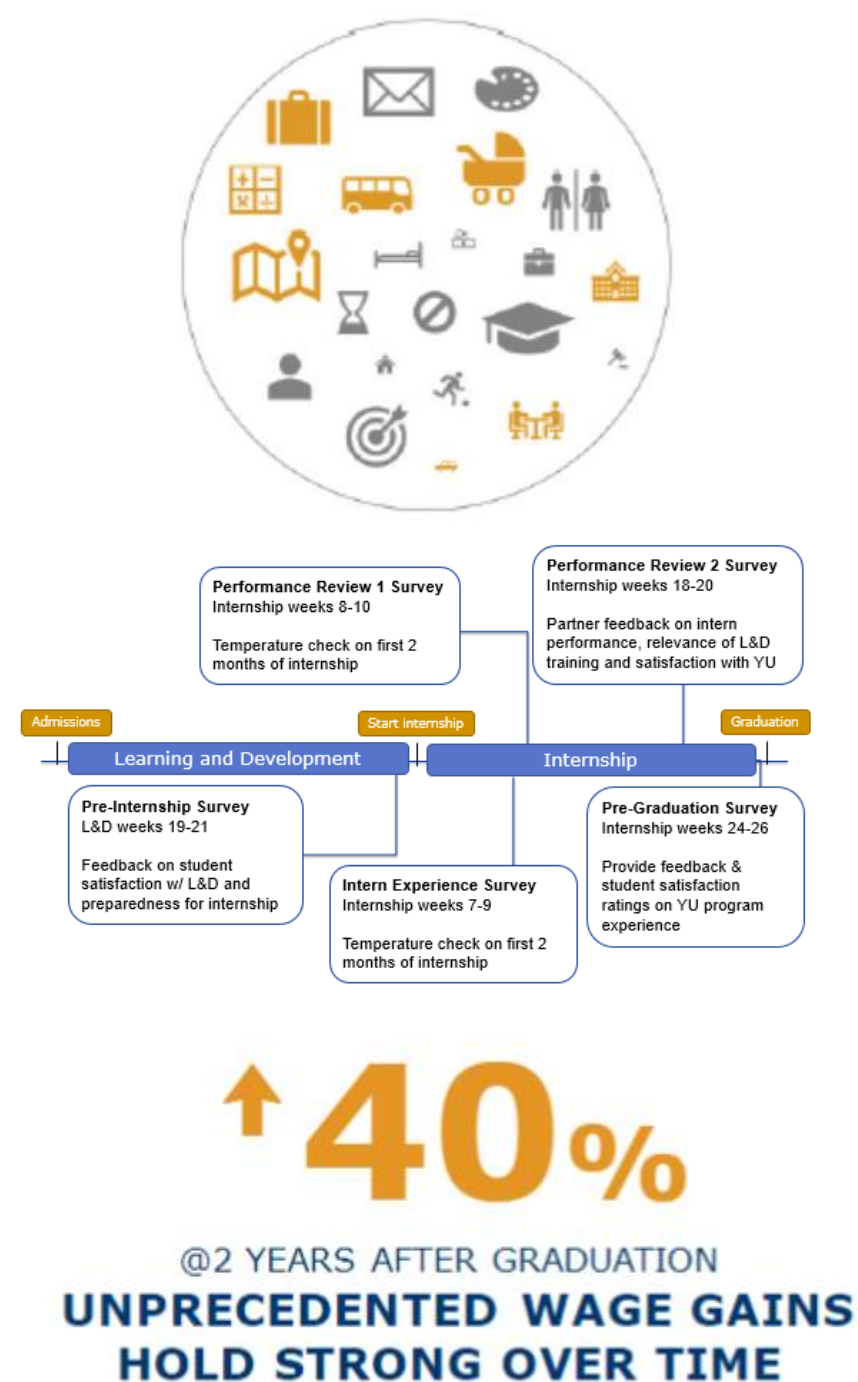
- Clear Metrics
- Frequent Reporting
- Data Collection & Analysis
- Learn from Research



## PILLAR 6: MONITORING FOR CONTINUOUS IMPROVEMENT

**Year Up collected everything and the kitchen sink.**

But extensive research isolated the factors that matter most at the start of program, the ones that shape success during program, and the single outcome that spells out to the longest-term impact after program.

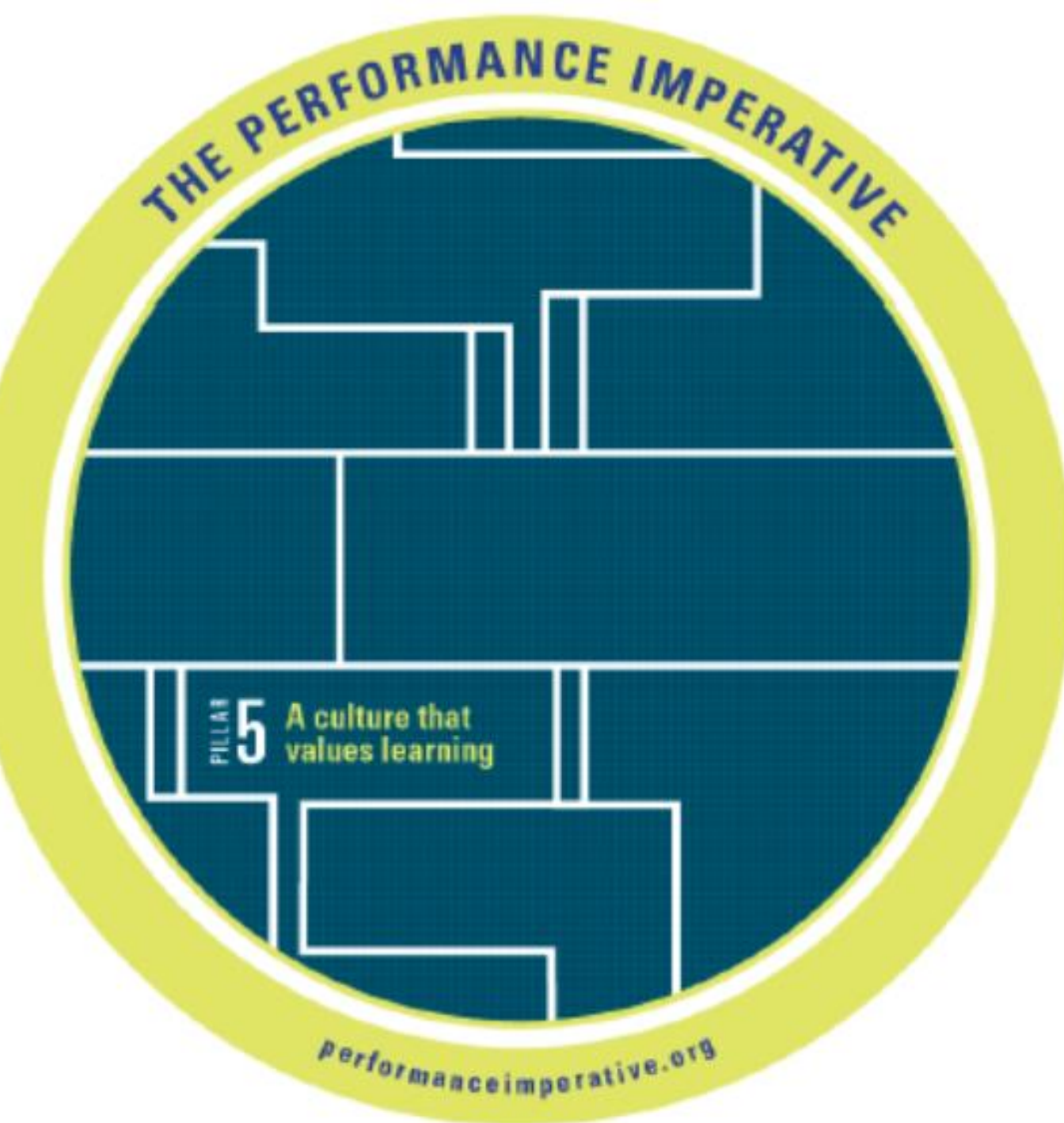




To what end?

The seven pillars of the Performance Imperative are the pathway to high performance—the ability to deliver meaningful, measurable, and financially sustainable results for the people or causes you serve.

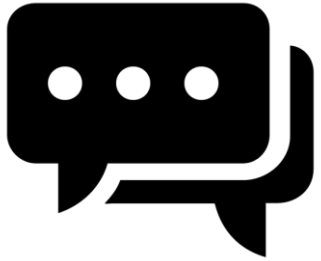
The Performance Practice puts the seven pillars into action by empowering social sector leaders to assess, measure, report, and then discuss their organization's performance and develop strategy for positive change over time.



## PILLAR 5: A CULTURE THAT VALUES LEARNING

- Periodically review mission and results
- Have and set high expectations
- Be curious, ask questions, push thinking
- Benchmark against others, learn from peers
- Feel safe acknowledging where there are problems
- **Carve out some time to step back, take stock, and reflect**

# THINK/PAIR/SHARE – PILLAR 5 LEARNING CULTURE



1. FIND a buddy. Complete the short questionnaire.

2. DISCUSS with your buddy: “What do your responses suggest about your organization’s learning culture?”

3. TAKE ACTION: write down question that you can take back to your team that would motivate them to start thinking differently about high performance and learning at your organization.

Adapted from the Leap of Reason Performance Practice

**COMMUNITY**

American Evaluation Association 2019 Conference  
Leap of Reason Performance Practice – Demonstration Only  
Assessing Organizational Culture for High Performance

Please choose the rating that best reflects your organization:

1. My organization's leaders revisit our mission every few years to determine whether it needs to be revised.
  - a. This is not done.
  - b. This is done, but little or no progress is made.
  - c. This is done, and substantial progress has been made.
  - d. This value is fully embodied by my organization.
2. My organization can point to recent examples in which we made changes to a program after we learned it was not effective.
  - a. This is not done.
  - b. This is done, but little or no progress is made.
  - c. This is done, and substantial progress has been made.
  - d. This value is fully embodied by my organization.
3. My organization devotes time to sharing and discussing results with all staff and board members.
  - a. This is not done.
  - b. This is done, but little or no progress is made.
  - c. This is done, and substantial progress has been made.
  - d. This value is fully embodied by my organization.
4. My organization uses staff meetings to highlight exemplary staff and programmatic victories.
  - a. This is not done.
  - b. This is done, but little or no progress is made.
  - c. This is done, and substantial progress has been made.
  - d. This value is fully embodied by my organization.
5. My organization values spending time to study research, case studies, and news articles to glean insights for improving our program.
  - a. This is not done.
  - b. This is done, but little or no progress is made.
  - c. This is done, and substantial progress has been made.
  - d. This value is fully embodied by my organization.

For more information, visit:  
<https://eapembassadors.org/continuous-improvement/performance-practice/>



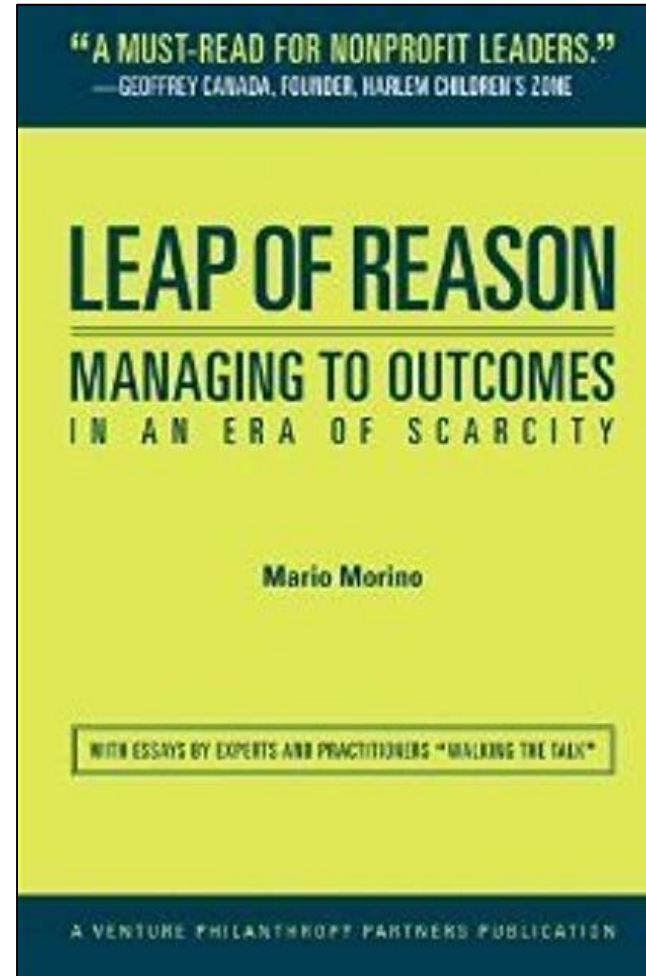
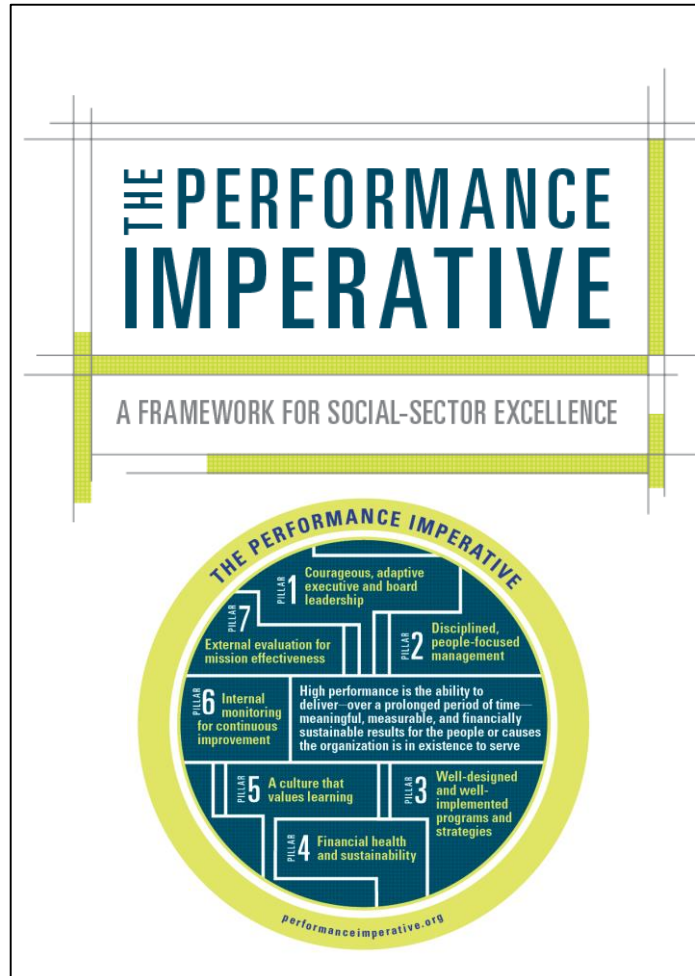
- ✓ **Step 1: Define the Learning Session**
- ✓ **Step 2: Prepare Your Team**
- ✓ **Step 3: Complete The Performance Practice**
- ✓ **Step 4: Review The Responses**
- ✓ **Step 5: Share The Data With Staff**
- ✓ **Step 6: Learn and Improve**
- ✓ **Step 7: Repeat**

# Questions?

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# <https://leapambassadors.org/>



THE CHRONICLE OF **PHILANTHROPY** May 2018

## The Impact Evangelist

Entrepreneur Mario Morino, a venture-philanthropy pioneer, leads an invitation-only group crusading to improve charity performance. It's not easy.

By MARC GUNTHER

Mario Morino would soon turn 70. For a blue-collar kid from Cleveland, he had done very well for himself. He had made a fortune in the software industry and given a lot of it away—about \$40 million, he estimates. He had helped pioneer venture philanthropy, an approach to charitable giving modeled on venture capital. He had written a book called *Leap of Reason*, urging nonprofits “to create more meaningful, measurable good.”

Morino was unsatisfied. He took time off after publishing his book, and he was restless. “I felt guilty,” he recalls. “I’d been out of the action for two years.” He could have joined another board or run, but he wanted more. So he set out to build a movement to improve the performance of America’s charities.

“There are too many nonprofits,” Morino says, “that are just not doing enough to ensure they’re making a positive difference.”

This was 2013. Beginning with a handful of collaborators, Morino gradually persuaded dozens of leaders of nonprofits and foundations to form an organization known, inarguably, as the Leap of Reason Ambassadors Community.

Five years later, the by-invitation-only group, which operates mostly by email and phone, has about 160 members. (Among the best known are Jeff Brundach of Bridgepark, James Canada of the Barr Foundation, Dan Cardinale of Independent Sector, Kathy Reich of the Ford Foundation, Nancy Riosh of the Edna McConnell Clark Foundation, and Bill Shure of Shure Our Strength.)

Together they have produced thousands of words, recorded many hours of videos, and built an extensive set of tools, all designed to help themselves and their peers build, evaluate, and sustain what they call high-performance organizations.

How’s it going? Morino feels good about the ambassadors, the connections they have built, and the products they have produced.

“We’ve got great people,” he says. “They care intensely. It is a real community.” But the community’s ideas and practices have taken longer than he would have liked to spread beyond its members. “We’re growing a nucleus of people who see a common horizon,” he says. “Now it’s time to go into campaign mode.”

**Resolve, Resources, and Tools**

“Not many nonprofits manage to outcomes, and among those that do, few do it well,” so said McKinsey & Co. consultants Lynn Talema, Jonathan Law, and Laura Callanan in their introduction to *Leap of Reason*.

It’s not that the leaders of charities don’t care enough or aren’t smart. What seems to be missing, they say, is a lack of resolve to take on the hard work that change requires, insufficient resources to invest in management capacity, and the absence of tools to do so effectively.

The Leap community is designed to attack on all three fronts. True to their name, the ambassadors are expected to evangelize for better, outcomes-focused management. They argue, too, that donors should support their grantees’ learning and improvement. And they have collectively developed content to spread the word and tools to drive high performance.

They went on to build a framework called the Performance Imperative, aka the PI, which includes seven principles touching on the role of leadership and boards and the need for external evaluation. (See article on Page 34.) The PI is based not on research but on the collective experience of leaders of the community; it took more than a year to develop.

Since then, the group has built a tool called the Performance Imperative Organizational Self-Assessment, which helps charities measure their progress, and a PI for small nonprofits. It’s also developing PIs for health-care organizations and faith-based groups.

Lowell Weiss, a former Gates Foundation executive who is one of Morino’s close collaborators, says, “The pursuit of high performance is expensive.”

**LEADING**

“Funders should expect high performance, but they must help their grantees.”