5 QUESTIONS A HEALTHY ORGANIZATION CAN ANSWER
What is on this slide is not news to any of you. Likely there are additional things you also consider unique to your region, areas of focus, leadership style, business model, etc.

The market and I call it that purposely within it there is increasing competition for people’s time and attention. This also presents opportunity for collaboration and partnership.

However to do so well, there are 5 questions, if you (and your organization) can answer, better position you to not just survive but thrive and be impactful in this ecosystem.
Notes

Literature and experience tell us that the most high performing organizations are able to answer a set of questions and demonstrate how they use the answers throughout their organization

1. It’s important to start with “What is the difference you seek to make? – This is not about what you do, but what happens as result of what you do.

2. What is your unique contribution? – This question seeks to have an organization reflect upon and make transparent where it fits in the larger context of the work—geography, sector, or issue. It asks you to make clear your connection to other organizations?

3. How are you working to make change? This is about understanding how the pieces fit together to make the change you seek. It’s about more than the aggregate of activities but the rational for why you do what you do, for whom, and how and with a specific end in mind.

4. What are you learning? There is a lot of talk in the field about learning, but we know that is not enough. I often say I have learned a lot of things that I do not apply. This is really about how turning learning in to organizational knowledge and action that supports your mission.

5. What do You need to do to succeed? This is where strategy and planning intersect. Given your intention or mission and the context or environment in which you work, what capacities and competencies does your organization need to succeed? This is about more than money. It’s about partnership, staffing, inter-organizational relationships and practices, and the composition of your Board of Directors, to name a few examples

These five questions are a starting place to weave together, strategy, evaluation, learning, context and impact.
This is what we often refer to as the “so what” question. This is not about what you do, but what happens as result of what you do.

Most organizations exist to address a gap/need/desire in the community. Often we think we exist to deliver a service or do a thing. Those are a means. Naming the ends is critical and reminding ourselves that all what we do is in service of that decreases the likelihood that decisions and actions get too far astray. Ultimately, we want, for the most part, to make our efforts obsolete. Meaning that if we are successful, individuals, organizations, communities no longer need us for that which they needed us for in the beginning.

TIP: If you start the sentence with a verb or any word that ends in “ing” you are talking about doing. It should also be non-directional. Meaning no increase or decrease.
I have rarely meet a Mission of Vision that provided enough focus and clarity that can given an executive the space to say “no”.

If our default is yes, then we are not being strategic.

Given the opening session yesterday, the role of transparency of values and assumptions is powerful. How you see the world informs your intentions and the strategies you use. It is also a differentiator from similar organizations/ networks, etc that may have similar strategies.
In this ever shifting landscape, it is critical to have a reference point that helps us remember where we are going so that we can navigate our way while holding true to our beliefs and intentions.
There is a growing and established body of research about and acknowledgement of the types of leaders (and organizations) that are most effective in this new reality.

It is those that are able to have focus and create and nurture a culture that allows them to consistently re-calibrate.

One tool that has been useful is a strategic framework. I know some of you have something similar.

This is an example of what a strategic framework might include. A Theory of Change (see next slide), a Decision Screen and an Inquiry Matrix (I talked about this last year and will talk a bit more about in a few slides)

NOTE: This was sent to everyone who gave me their name and email address at the session on 7/20 at the UnitedForum Annual Conference.
Notes

Here is an example of a Theory of Change which is part of a Strategic Framework. It includes the following components:

- **Problem/Issue Statement** - The problem(s) with the world that an organization/network/collaborative seeks to address
- **Values/Guiding Principles** – Values reflect the enduring beliefs or ideals shared by an organization/network/collaborative. Guiding Principles are a more specific description or articulation of how those values “show up” in practice and serve as a compass or guidelines and guide the behaviors, actions and decisions within said organization/network/collaborative.
- **Contextual Factors** - Inhibiting and facilitating factors, outside the sphere of control of organization/network/collaborative that will impact its success. Consider recent changes or discussions in the field, demographics & characteristics of a community, infrastructure
- **Anticipated Change/Outcome** - The way the world would look if the change an organization/network/collaborative seeks is realized
- **Community Assets** - Strengths that can be leveraged to affect desired anticipated changes.
- **Assumptions** - Those things not proved but which the organization/network/collaborative believes and which influence their approach to the work and the outcomes they seek.
- **Evidence** - Empirical and experiential data that supports the importance of the issue and the likelihood that strategies will be effective in addressing.
- **Strategies** - Cross cutting methods used by the organization/network/collaborative to work toward the anticipated changes.

Remember, the Theory of Change is an articulation of the identify of an organization, or in this case JBC. It speaks to whole in
its entirety and complexity.
Q2 is about understanding where your fit in the ecosystem. What do you do, or offer, that no one else does?
How many of you are familiar with the Hedgehog Concept?

The idea being that the fox has multiple strategies (OFFENSIVE) which may be more or less successful where as the Hedgehog has one (DEFENSIVE) strategy that has allowed it to survive with little adaptation for the past 15 million years.
Jim Collins introduces the sweet spot in Good to Great, Why Some Companies Leap and Others Don’t. and then followed that up with a monograph when his social sector colleagues refuted his findings as they were informed by researching Fortune 500 companies. Not surprisingly, he found a commonality.

Collins’ hypothesizes that good leaders are hedgehog’s which have a singular purpose which unifies, organizes, and guides all decisions. The challenge is to stay in the sweet spot more often than not. Developing a Theory of Change/Strategic Framework may help you get clear.

The “sweet spot” is where the circles intersect and represents three pivotal questions:
1. What can we be the best in the world at? (And equally important—what can we not be the best at?)

2. What will the market buy or spend? This includes both money and time. This is tricky for membership organizations as what we mean by community and connection has changed,. The answer may impact your business model.

3. What drives us to do this work and to what end? It’s about not only intentions but about values. And, this does not change, it is your identity.

4. Think of this as clarifying strategy not planning, Or at least not yet.
A Decision Screen can be a valuable tool to assess how close you are to your sweet spot. The key is that it makes explicit a core set of questions that should be considered when entertaining a new endeavor. There is likely to be some variation in the questions depending on role (Board or staff) as well as whether it is a decision or a recommendation.
No matter what you call, it, a Decision Screen or strategy screen it should be part of your strategic framework. If you use it, across your organization, it can help you operationalize your theory of change and help you navigate the shifting context and the core considerations which shape decisions and actions.

Remember a tool, no matter how well designed, is useful if it is not used. Finding ways to weave the decision screen in to your daily practice (e.g., staff, board, etc.) as a way to systematically and consistently think through a common set of questions as you entertain ideas, partnerships, funding, etc. will go a long way in creating a collective consciousness for your organization/network.
Q1: What is the difference you seek to make?

Q2: What is your unique contribution?

**Q3: How are you working to make change?**

Q4: What are you learning in your work and how can you apply it?

Q5: What do you need to do to succeed?

Q3. This is one where the rubber often hits the road.
So many times in reading stories, papers, annual report and in conversations, I walk away from organizations not quite sure about how what they did contributed to the difference/impact desired.

I think sometimes humility prevents making the how and the logic explicit. This does not help you.
It’s important to have a clear, transparent, and logical theory about how your efforts move individuals, organizations, systems, structures, or networks toward change.

This is clarity is even more important given greater competition for people’s time, energy, intellect and money.

This is not about boasting but about understanding and being able to communicate the difference you seek to make (answer to Q1 and named in your Strategic Framework) and your efforts contribute to making it happen (or progress towards it) concisely to someone.
This brings us to … and I know some of you are groaning and rolling your eyes. some sort of modeling process. Note I said modeling and process.

It is the conversations and clarity that are important for you to have internally.

The logic model is merely a reflection of how you believe change will happen. It is not truth. It is, and should be, a reference document for how you design and implement your efforts in service of a stated aim and it can serve as the launch pad for learning/assessment/evaluation.
Q1: What is the difference you seek to make?
Q2: What is your unique contribution?
Q3: How are you working to make change?

**Q4: What are you learning in your work and how can you apply it?**

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Q4. This is where we talk a bit about data and information. But we don’t start there..
and one of the reasons, is that it leads us down the path of measurement madness.
Last year in the session “making up with evaluation,” I offered a different way of not only making sense of what you already have but also getting clearer on what you really need to know, why, etc. Those of you that provided your name and email received a copy of that deck and the workbook.

Notice that it starts with intention.

- **Intention** - What is the change you are seeking?
- **Inquiry** - What questions do you want/need to have answered to understand what happened, for whom, how and to what end?
- **Information** - What data or data sources do you already have that help you answer those questions? How do you use it now? Analyze it?
- **Imagination** – What might you do differently in terms of collecting data and turning it to useful, appropriate and timely information to shape actions and inform decisions?
This is an example of an Inquiry Matrix. Its purpose and benefit is that it becomes an inventory of all the questions you seek to answer and can help you make sense of your current data source environment in that it provides a way to prioritize questions by purpose and audience and rate the quality and efficiency of current data sources. It also helps you focus when you decide to create new data collection efforts, what questions do you need answer to? Why? For whom? Ideally any data collection effort serves multiple mistress. This is how you build efficiency and support inquiry which measurement may support but is not the driver.

Remember, data is only useful if used. So as you see to build something like this out, be mindful of the resources needed to analyze and synthesize the data so that it answers identified question in a way that is useful and in a timeframe that is reasonable.

**Column 1** - Any given program/effort might have more detailed and context specific questions that would probably be generated with a brainstorming. These questions are refined and organized within these overarching.

Columns – Depending on how your organization is structured. this might be programs, efforts, departments, etc.

**Row 2** - Using a simple 1-3 scale of Low, Med and High is an easy way to assess where are true gaps and where there is room for improvement. We like color coding AND because people process information in different ways, we often use numbers and colors.
Again this should be part of your Strategic Framework. Your inquiry, be it learning, assessment or evaluation should relate to the stated aims of your organization/network as a whole.

Program should not drive inquiry. The questions should be very much the same. The measures might be slightly different.

Try really hard to make sure the questions you ask have relevance to the larger whole and can apply across programmatic areas.
Ok now that you have answered, or tried to, the previous four questions. It is time to move to planning,

Some of you have moved to annual planning. Think of the SF as an articulation of who you are, what matters to you and what you need to know to make sure you are on track. You return to to annually to see how well you are doing on progress towards aims, to understand alignment and what you might need to do differently, and to determine what competencies or capacities you need to develop to support your SF.

Through answering Q1 – Q4 hopefully you have identified areas of clarity and alignment and potentially some next steps where you need to tighten things up. Imagine a process that would result in clear responses to the first four questions and a way in which they may be displayed so they are a ready resource and reference.
As you start to think about planning (which assumes you have a clear SF), these are a few criteria which may be useful in keeping your strategic intent front and center. Note that the Theory of Change is a core criteria.
If your organization can, as a whole, answer these 5 questions with consistency across roles, it is likely you are operating with a high degree of alignment and thus are leveraging your resources and efforts in service of a shared aim. Congratulations. Hopefully you are using tools and instituting processes that assure this alignment in an ever changing environment.

The process of reaching this clarity will likely reveal some areas of strength and uniqueness perhaps gone unnoticed or appreciated. It will also likely surface some areas of attention that are needed.
As you go forward, a few things for you to remember.

If you opt to share this with others in your organization, ask them if anything else resonated with them as a new or affirming idea. Whatever the answer, encourage you to think of ways to dive a little deeper in to what that means for how you currently think, decide and act.

Feel free to reach out to me directly at jara@theluminaregroup.com if you have any questions about the content of this deck.

Also feel free to check out http://bit.ly/2fqekDz for more resources.
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