5 QUESTIONS A HEALTHY ORGANIZATION CAN ANSWER
A Little Context

- Philanthropic Intermediaries
- Increasing interest in role of values and purpose
- More and different ways of connecting
- Greater competition for resources
- Ever expanding philanthropic intermediary market
- Role of Collaboration, Networks and Partnership
- Lots of feelings about defining and documenting impact

#ForumCon17 #JaraPOV @jdeancoffey
What is the difference you seek to make?

What is your unique contribution?

What do you need to do to succeed?

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

How are you working to make change?
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?
MORE THAN MISSION & VISION

What CHANGE do you seek to make?

What is your APPROACH?

What SHAPES and INFORMS your work?
You've got to be careful if you don't know where you're going because you might not get there.

— Yogi Berra,
National Baseball Hall of Fame, 1972
Graphic image depicting conceptual linkage among an identified issue/problem, intended change, potential strategies, and values that guide the work of an organization/effort.

Touchstone for making operational and programmatic decisions, forming and nurturing partnerships, grounded in intended impact, key criteria, and organizational priorities.

An initial matrix which lifts up questions relevant to learning and evaluation which speak to execution of strategy, operations, organizational culture, context and progress towards intended change.

= STRATEGIC FRAMEWORK
**Theory of Change**

**VISION:** A community engaged in positive change and transformed by service.

**MISSION:** We advance nonprofits and volunteerism by strengthening leadership, encouraging innovation and empowering individuals in our community.

**EQUITY**
- Our work reflects our commitment to opportunities, access and advancement for all to thrive and flourish.

**RELEVANCE**
- We are contemporary in our approach to issues, ensuring our work is current, innovative when necessary, and steeped in community-based need and culture.

**INQUIRY**
- As individuals and as an effective organization, we engage in reflection and learning that supports skillful action that leads to results and advances our practice.

**INTERDEPENDENCE**
- We nurture and create partnerships and networks recognizing the importance of shared responsibility and action.

**SERVICE**
- We recognize and appreciate the power and passion of individuals that work to benefit their community.

**GUIDING VALUES**
- **SERVICE:** We recognize and appreciate the power and passion of individuals that work to benefit their community.

**ISSUE ADDRESSED**
- We need greater connection and collective action to accomplish social change.

**PRIMARY STRATEGIES**
- Research, identify, disseminate and model best practices and emerging trends
- Identify, cultivate, and support current and future leaders from a diverse range of communities and backgrounds
- Design and deliver evidence-based programming
- Foster opportunities for engagement and collaboration
- Offer equitable access to programming for people at all levels of experience and background
- Celebrate and elevate the contributions of individuals and organizations that drive change in their communities

**ANTICIPATED CHANGES/OUTCOMES**
- Individuals have the knowledge and skills to lead and manage organizations and networks
- Individuals engage in building stronger communities
- A healthy, diverse pipeline of people prepared to take on increased leadership responsibility
- Nonprofits are better able to deliver on their missions
- Individuals discover their power to make a difference
- Nonprofit organizations, leaders and volunteers work together to create an equitable community

**ASSUMPTIONS**
- We believe in the inherent value of the individual to make decisions and take action.
- We believe that the collective wisdom of the group can lead to lasting change.
- Organizations that invest in their leadership, management, and network capacity are more likely to sustain impact over time.
- Leaders exist at all levels of an organization and influence an organization/network regardless of their title or tenure.

**CONTEXT**
- Demographic, economic, political shifts and trends locally, regionally, nationally
- Blurring of roles and responsibilities in private, public, social and philanthropic sectors
- Research findings and tensions re: effective models and purpose of capacity building for nonprofits
- Important, yet challenging role of intermediaries in the philanthropic system
- Role of and support for volunteerism as a core component of civil society
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?
The Hedgehog Concept

Passion: Mission/Core Purpose and Values

Resource Engine: Time. Money and Brand

Best At: Unique Contributions and Effectiveness

Sweet Spot

COLLECTIVE CONSCIOUSNESS

Does this align with our values?

To what degree does it leverage our core strategies?

Do we have the capacity to execute well?

How does this contribute to org. outcomes?

What resources are needed (human, financial, etc.)?

Decision Screen
**THEORY OF CHANGE**

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**DECISION SCREEN**

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**INQUIRY MATRIX**

An initial matrix which lifts up questions relevant to learning and evaluation which speak to execution of strategy, operations, organizational culture, context and progress towards intended change.

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**STRATEGIC FRAMEWORK**
Q1: What is the difference you seek to make?

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

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"A Miracle Occurs"

I think you should be more specific here in step two.

Then a miracle occurs...
What You Do

1 + 1 = 2

The Difference You Make
It’s the Process that Matters

Source: Presentation to the Whānau Ora Hui – Sharing the Learning
Auckland, 15 – 16 August 2011
Kataraina Pipi and Mariao Hohaia (PATH Facilitators)
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GOOD NEWS! WE GOT ALL FIFTY SEVEN FINGERPRINTS AT THE SCENE AND MADE A MATCH TO EACH ONE.

THE BAD NEWS IS THAT WE'RE SUPPOSED TO BE LOOKING FOR A LOST DOG.
Meaningful Data
Informing Actions & Decisions

Imagination

Information

Intention

Inquiry

Luminare Group
# Inquiry Matrix

<table>
<thead>
<tr>
<th>Priority Inquiry Questions</th>
<th>Focus Area 1</th>
<th>Focus Area 2</th>
<th>Focus Area 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. HOW MUCH: Who did we reach? Who did we miss?</td>
<td>2</td>
<td>3</td>
<td>3</td>
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<tr>
<td>2. HOW MANY: What is the frequency, duration and nature of interactions with members?</td>
<td>2</td>
<td>2</td>
<td>2</td>
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<tr>
<td>3. WHAT CHANGED: What is different among members in terms of connections, communications,</td>
<td>3</td>
<td>3</td>
<td>3</td>
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<tr>
<td>collaborations and/or capacity?</td>
<td></td>
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<tr>
<td>4. DID IT MATTER: To what extent and in what ways are members leveraging improved</td>
<td>1</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>connections, communications, collaboration and/or capacity?</td>
<td></td>
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<tr>
<td>5. WAS IT WORTH IT: To what extent and in what ways do we make a difference in the</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>communities in which our members seek change?</td>
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</tr>
</tbody>
</table>

How well does each address the question:

- 1: Addresses little and/or needs substantial attention to address
- 2: Addresses in part, and/or needs moderate revision to address
- 3: Addresses well, might benefit from minor revisions
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Planning Criteria

- Aligns w/Theory of Change
- Leverages External Context
- Effect/Return on Investment
- Level of Effort
- Probability
- ?
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Key Ideas

- Know YOUR sweet spot
- Understand the ecosystem
- Get clear on how CHANGE happens
- Let QUESTIONS and USE guide inquiry
- Planning is not the same as strategy
- ?
- ?
BUILDING A COMMUNITY OF PRACTICE

Revelations and Revolutions
Twitter
Luminare Group