

An aerial photograph of a rural landscape. The foreground shows a large green field with a grid of small trees, possibly a reforestation project. In the middle ground, there are several farm buildings, including a large barn and a silo, surrounded by trees. The background features rolling green hills under a clear sky. The text is overlaid on the image in white, bold, sans-serif font.

Measuring Success

Greenbelt Grantee Forum 2009

Kevin Yousie

Crosswater Partners

February 26th, 2009

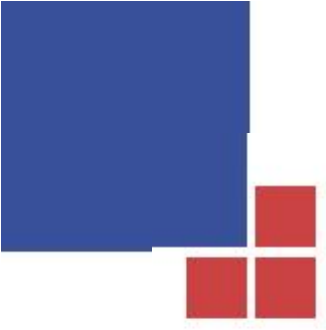
Measuring Success Presentation: Objectives



Measuring Success Presentation: Objectives

1. To try and challenge you to look at “measuring success” perhaps in a different way than you have in the past.
2. Hopefully generate some new ideas for you.
3. Discussion & fun.





Deciding What to Measure

Regardless of how small or large our organization is we need to ask:
What is Success?





Scenario:

1. You are going to spend the day climbing a rock face at Rattlesnake Point. One of your fellow climbers asks you “how will you measure the success of this outing”?
2. How would you answer?

Conclusion:

- Our measures of success are directly related to what we are trying to achieve.
- In an organizational setting that would be the Mission and Vision...

Back to Basics

What are we trying to measure?



Suggested Measurement Focus

Three things:


1. The degree to which the organization's **Mission and Vision** is achieved.
2. Success in implementation of **Strategies** that will lead to achievement of Mission and Vision.
3. Effective completion of **key day-to-day activities** necessary for achievement of Mission and Vision in a manner consistent with Values. (i.e. Core Job Responsibilities).



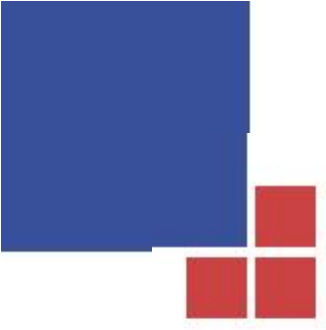
Focus



Focus



Performance Management



Potential Approaches for Organizing and Packaging

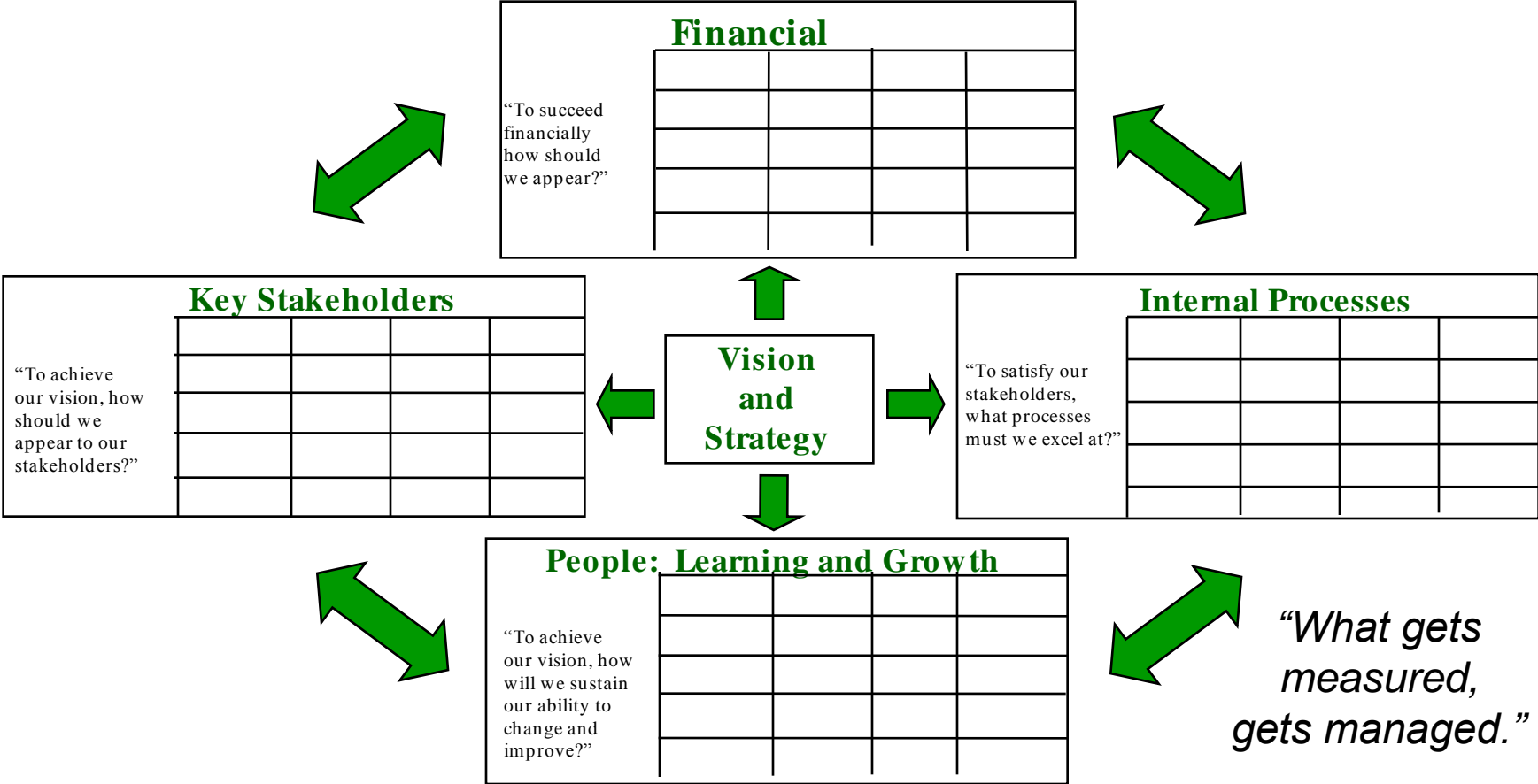
A Balanced Scorecard Approach...



Would a pilot focus on only one instrument during flight?

The Balanced Scorecard

A Typical Balanced Scorecard...



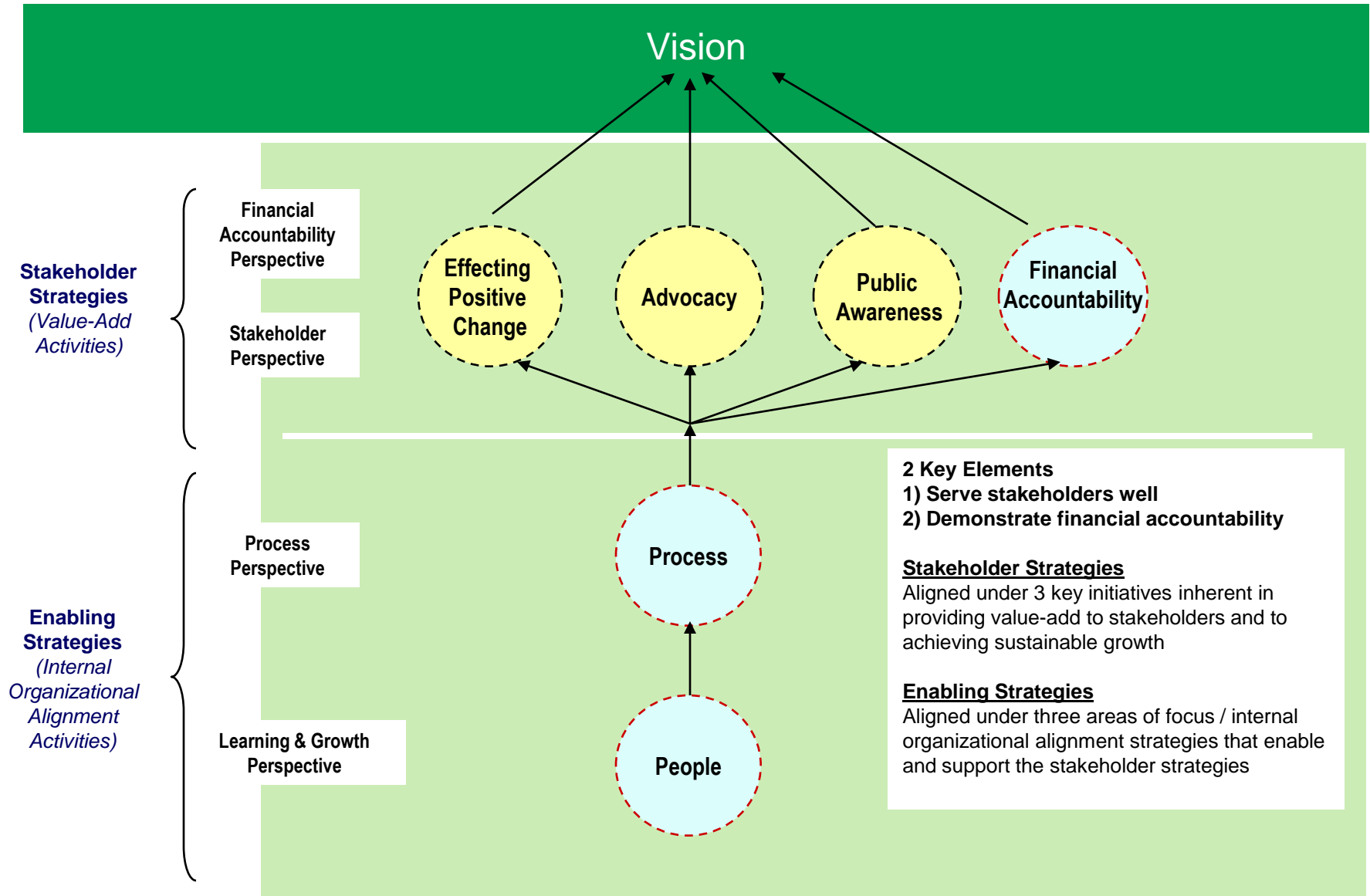
"What gets measured, gets managed."

"Cause & Effect" Measures

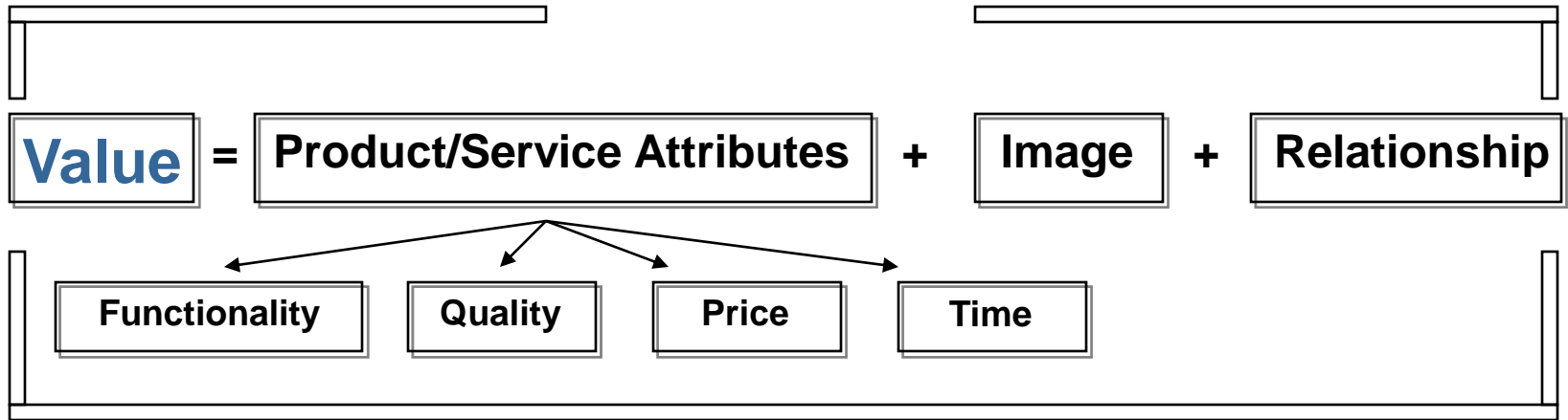
Source: R. Kaplan and D. Norton, *The Balanced Scorecard*, 1996

How Will We Achieve our Vision?

(Example)



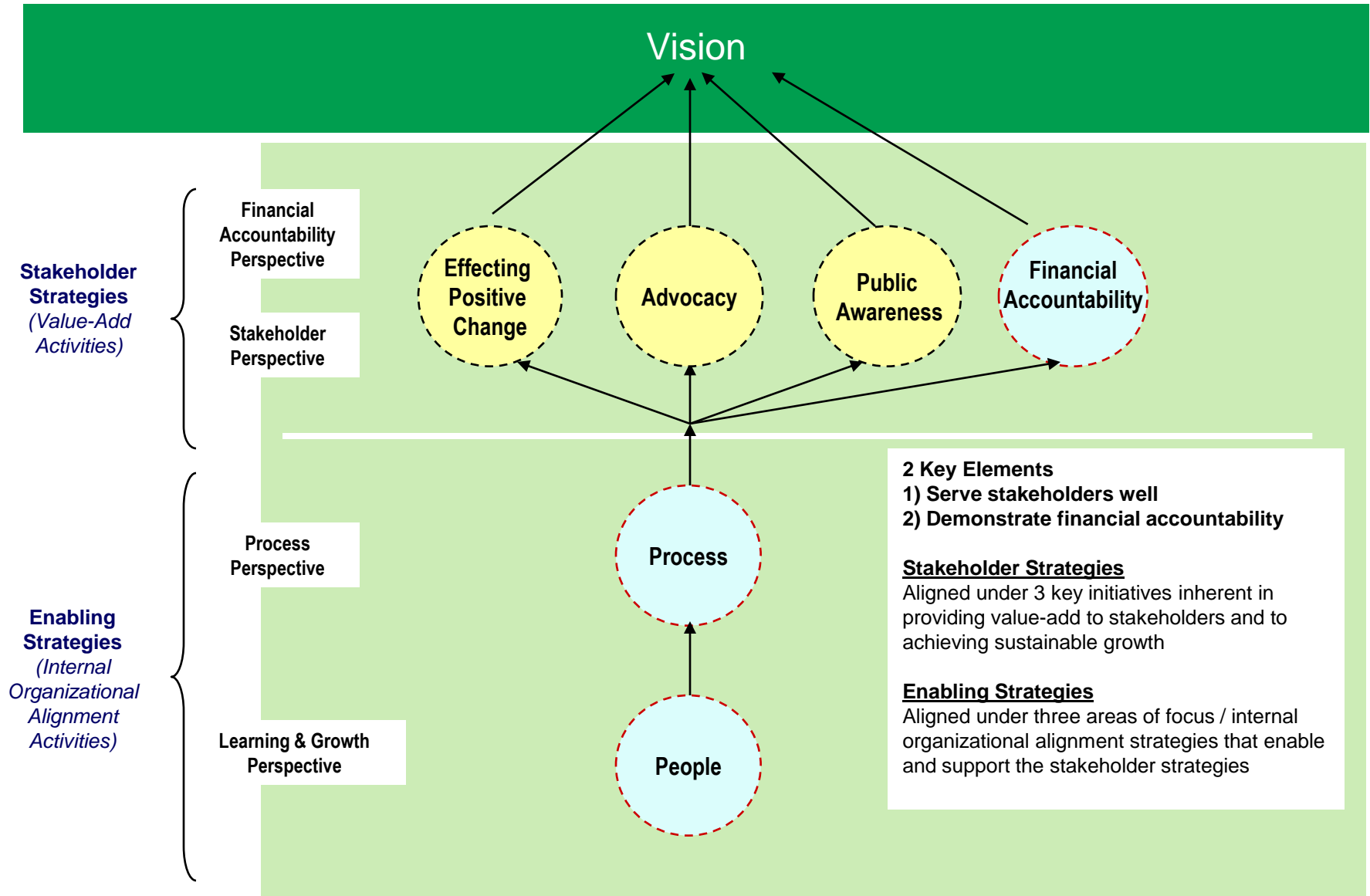
Value Proposition



Source: The Strategy-Focused Organization by Kaplan and Norton, 2001.

How Will We Achieve our Vision?

(Example)



**Your Organization
3 to 5 Year STRATEGIC PLAN ON A PAGE**

VISION

To be... *what is the desired state*

MISSION

We are... *what the organization does / why it exists / its purpose*

STAKEHOLDER STRATEGIES

Effecting Positive Change

Examples of Key Initiatives to support this Strategy...

- Enable and support constituents to engage with decision makers to facilitate positive change
- Position organization as a leader in area of expertise to help influence change

Advocacy

Examples of Key Initiatives to support this Strategy...

- Promote legislative changes.
- Strengthen partnerships offering complementary services
- Facilitate sharing of best practices among stakeholders

Public Awareness

Examples of Key Initiatives to support this Strategy...

- Grow awareness of organization and its mandate
- Expand awareness and presence (specific geographic area)

ENABLING STRATEGIES

Financial Accountability

Examples of Key Initiatives to support this Strategy...

- Ensure an adequate and stable source of funding
- Enhance transparency through effective reporting (Annual Report)

Process

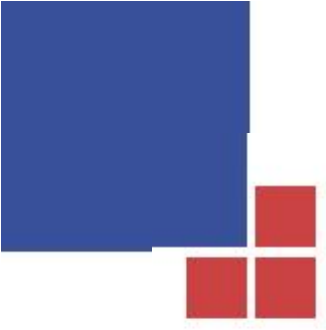
Examples of Key Initiatives to support this Strategy...

- Enhance Board engagement through an effective governance model

People

Examples of Key Initiatives to support this Strategy...

- Align staff goals with competencies and strategic objectives
- Attract and retain qualified and committed directors, staff and volunteers



Measures For Key Stakeholders?

Measures For Key Stakeholders

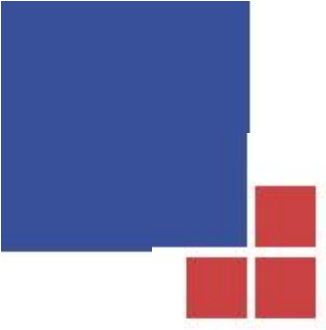
- In some cases your organization may also want to track measures of importance to key stakeholders?
- What are the needs, wants, and vested interests of these stakeholders?

Who Can Help / Who Can Hurt?

Stakeholder Assessment Tool

Situation / Issue _____

Stakeholder	Needs / Wants / Vested Interests	Potential Measures
1		
2		
3		



Measures to Monitor Key Strategic Assumptions

TOWS Analysis / SWOT Analysis

Consider these first.

External

Threats?

- **O**pportunities?

Internal

- **W**eaknesses?

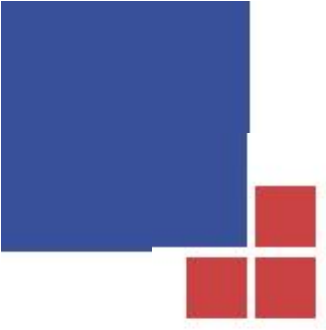
- **S**trengths?

- **C**onstraints???

Strengths & Weaknesses are:

- Relative to emerging Threats & Opportunities
- Relative to others who may want to achieve the same thing.
- Relative to what you are trying to achieve.

Assumptions?



Sample Measures

Some Examples of Measures

- Visitor satisfaction scores
- Percent variance against monthly budget.
- Number of certified producers within area X.
- % of performance appraisals completed by due date.
- Number of staff that have completed project mgt. training.
- Staff turnover rate.
- Water quality scores.

Some Examples of Measures

- % participation in financial giving by Board members (target 100%).
- % of farms growing organic crops.
- # of people using this trail per month.
- Number of protected acres as a percentage of available acreage.
- % increase in the # of rare and endangered species this year.
- User satisfaction.
- # of new bills approved in the legislature on this topic.
- Volunteer engagement index.



Questions, Examples, Stories, Comments?



Thank You