**SESSION TWO: PROBLEMS AND POSSIBILITIES  
*What is the current context?***

**Today’s objectives:**

* Begin to explore the practices of adaptive leadership and how they support a sustainability mindset
* Draft a problem statement and begin to identify intended impact statements for your organization
* Develop a plan for conducting an impact assessment in your organization

**MATRIX MAP PROCESS**

***SAMPLE: Tempest Theater Matrix Map***

**PRACTICES OF ADAPTIVE LEADERSHIP**

**Adaptive Leadership** is a practical **leadership** framework that helps individuals and organizations adapt and thrive in challenging environments. It is being able, both individually and collectively, to take on the gradual but meaningful process of change.

**SIX KEY CHARACTERISTICS OF ADAPTIVE ORGANIZATIONS**



1. **Name the Elephants in the Room**(Session 4: READING THE MAP)

* Naming the elephants in the room becomes the norm, not the exception.
* Model the behavior and protect dissenting voices.

1. **Share Responsibility for the Organization’s Future**  (Session 2: DESIGNING PROCESS)

* Nurture shared responsibility. Examples:
* Develop work plans, goals and metrics to evaluate the entire organization.



* Look for opportunities to work across functional areas.
* Share insights, ideas, and lessons across teams.
* Allow staff to “job shadow” beyond their functional areas.
* Talk about organizational accountability at meetings.

1. **Expect Independent Judgment**

* Push authority and decision making as far down into the organization as possible.



* Ask whether the task or decision you are about to take on could be handled by someone else, and if so, delegate it. Delegate not just tasks, but authority and decision making.
* Make yourself dispensable.
* Develop an organizational tolerance for ambiguity and uncertainty by being transparent about not having all the answers.

1. **Develop Leadership Capacity**



* Invest in professional development.
* Discard authoritarian supervision for “coaching” styles of supervision
* When advancing people internally, hire from other functional areas.
* Apply an equity framework to leadership development approaches, taking race, gender, class, and difference into consideration when providing opportunities.
* Establish a norm of developing succession plans.
* Encourage staff to stretch.

1. **Institutionalize Reflection and Continuous Learning** (Session 2: DESIGNING PROCESS)



* Ask difficult, reflective questions as a matter of course:
  + How will we know we’re successful?
  + What are our sacred cows?
  + What’s our worst case scenario and how will we deal with it?
  + How do we see ourselves? How do we want to be seen? How are others seeing us?
* Honor risk taking and experimentation
  + Celebrate learnings from failed experiments
  + Challenge each other to take risks
  + Include risk-taking as one of the performance metrics on evaluations
  + Test several strategies at the same time

1. **Engage in Systems Thinking**  (Session 4: READING THE MAP)

* Seek to understand the interrelatedness of issues as part of an overall system



* When problems and challenges surface, understand how they relate to the whole environment. Look for other places where similar problems and challenges are showing up.
* Take an equity approach when initiating changes across the system. Understand that every change impacts staff differently depending on their relative power and privilege within the organization based on job positions, tenure, and social identities.

**EXERCISE: Organizational Adaptive Leadership Assessment  
FIRST**: Silently and individually, assess your organization. This is from your perspective, not what you think others believe.

**SECOND**: In organizational teams, compare your responses.

**Notes:**

**NAMING THE PROBLEM**

We believe that strong strategy rests on getting clear and concise about the *problem* the organization exists to resolve. At first blush, this can seem perfunctory: *Of course we know what we’re here to do, just read our mission statement*.

But if behaving strategically as an organization is about making and acting upon a clear set of choices, we need a deeper analysis to ground the work. Within the big umbrella of the problem (domestic violence, environmental degradation, and educational inequity, for example) what are we actually trying to achieve and how well are we doing that? We have seen this kind of inquiry net deeper insights and create a more profound look at programming in the context of the specific results we are trying to achieve.

Underlying this work is an understanding that:

* Problems are dynamic and change over time – both as the *conditions* around us change, and as our *understanding* of the issues change
* Having a shared analysis of the problem helps focus our efforts
* Clearly articulated, compelling problems can be motivating and inspire people to collective action

**WHY IT MATTERS**

In considering the utility of this exercise, think about the example below. A Habitat for Humanity affiliate could decide to align their work around any of the following different perspectives on the problem of affordable housing, each of which would be “on mission” but would have radically different implications for organizational structures, policies, partnerships, and strategies.

**EXAMPLE: Habitat for Humanity**

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| **Different Problem Statements** | **Different Implications** |
| The lack of affordable, homeownership housing fuels gentrification and creates housing insecurity. | Structures: Board (raising $$$)  Policies: Pricing/Affordability of housing  Partnerships: For-profit developers  Strategies: Dramatically increasing the production of homes. |
| Critical physical structures in neighborhoods are deteriorating, threatening our community’s ability to thrive. | Structures: Board (Community relationships)  Polices: Volunteers hours  Partnerships: Neighborhood groups  Strategies: Repairing homes and renovating key community hubs. |
| Injustices around wealth accumulation opportunities for people of color severely deepens economic inequality along racial lines. | Structures: Board (Structural analysis of racism and economic oppression)  Polices: Inheritance  Partnerships: Financial policy makers  Strategies: Asset accumulation and financial empowerment for POC. |

**EXERCISE: What’s the problem?**

Most problem statements can be expressed in a variety of ways, depending on our assessment of the current context, our understanding of the needs of our constituents, and where we are best positioned to focus our efforts as an organization.

**Problem Statement Defined:**A concise and compelling description of the conditions we aim to change.

**Strong problem statements should:**

* Represent our current analysis of the problem we aim to address, not the need we work to fill.
* Excite and motivate people to rally around the issue and/or provoke conversation and thinking   
  for internal and external stakeholders.
* Name conditions that an organization cannot solve alone– but that it is actively contributing to.
* Be grounded in facts – but might also be argued against.
* Be concise, powerful, and accessible in language with a minimum of qualifiers and clauses.

Sample Problem Statement:

**Women still lack equitable power in all aspects of their lives.**

**Decision-makers do not hear the voices of low and moderate income residents in San Joaquin County and make decisions that do not address their needs.**

**Due to historical legacies and pervasiveness of racism, patriarchy and xenophobia, there are structural and institutional barriers that deny day laborers and domestic workers equal protections and economic equality.**

**Your First Problem Statement Draft:**

**HOW ADAPTIVE IS YOUR ORGANIZATION?**

Referring to the Adaptive Leadership assessment:

* Which of the practices will you most need to engage in as you refine your **problem statement**?
* Which practices do you need to strengthen or adopt?

**INTENDED IMPACT STATEMENTS**

*Refer to CHAPTER FOUR*

“A statement or series of statements about what the organization is trying to achieve and will hold itself accountable for within some manageable period of time. It identifies both the benefits the organization seeks to provide and the beneficiaries.”

* “Zeroing in on Impact,” Stanford Social Innovation Review (Colby, Stone, Carttar)

Impact Statements answer the question*, “We will know we are successful when…”*They include specific, observable changes that indicate that the problem is being resolved   
and help us orient our work toward contributing to the change we seek in the world.

**Example Impact Statements:** While these statements have not articulated specific numeric targets, they indicate an organization’s orientation toward a specific outcome, or change, in the world. They can be used to develop even more specific and quantifiable program targets and evaluation metrics to guide the organization’s work.

*Housing policies and funding decisions prioritize people struggling with poverty in San Francisco.*

*There is a pool of strong, diverse, resilient leaders positioned to catalyze change for LGBT people.*

*There is a large network of aligned voices advocating for reproductive justice.*

*There are more women and girls in traditionally male-dominated fields (tech, media, politics, etc.).*

**REFLECTION QUESTIONS:**

* ****What will look, feel, sound different in the field or movement if our organization is successful in its work?
* What are we holding ourselves accountable to in this work?
* If we went away today, who would it matter to and why? What would our success look like to them?

**EXERCISE: Impact Statements**

Given the problem as you have defined it, how will you know it’s being resolved?

**Intended Impact Defined:***Specific, observable changes that indicate that the problem is being resolved.*

**Draft your first intended impact statement:**

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**SETTING UP FOR HOMEWORK: Designing and Executing the Impact Assessment**

**Finalize Your Impact Criteria**

We will use impact statements that you just drafted as the basis for assessing the impact of your core programs.

Choosing impact criteria that challenge staff and board to assess the current state of affairs against what they know or imagine to be emerging practice—as opposed to the existing standard practice—results in a far more useful assessment process. The worst-case scenario is a matrix map that affirms stale practices rather than one that stirs leaders to push for the change in program mix, design, or execution that will increase mission relevance and impact.

* *From Sustainability Mindset*

Complete your 4 assessment criteria: three intended impact statements and one excellence in execution statement

**Intended Impact Statement #1:** *Example for a domestic violence organization:* “To what extent, as it’s currently executed, does the shelter program promote a violence-free community for our clients and donors?”

**Intended Impact Statement #2**

**Intended Impact Statement #3**

**Excellence in Execution: *We deliver this program in an exceptional manner* #4** *Example from a community clinic: “To what extent, as it’s currently executed, does the Annual Event employ our current organizational systems and protocols for optimally supporting clients and donors?”*

**DESIGNING THE PROCESS**

The rigor and strategic utility of the matrix map process hinges substantially on the design and execution of the impact assessment process. It is important to distinguish between designing the impact assessment process and executing it. Given that this is a subjective process by design – not an evaluation attempting to deploy the scientific method – the potential for board to feel confused, reticent, or even dubious is real. You cannot take too much care in designing the process, including which stakeholders will or won’t be involved and communicating your decisions clearly and frequently.

* *From Sustainability Mindset*

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| **TASK** | **ACTION PLAN:** who, how, when |
| Determine who will select and tailor the impact criteria |  |
| Determine *who* will participate in the assessment (consider who will ultimately see and help interpret the results) |  |
| Determine *how* to conduct the assessment (survey, conversation) |  |
| How will you communicate your design choices? |  |

**EXECUTING THE PROCESS**

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| **TASK** | **ACTION PLAN:** who, how, when |
| Select and tailor impact criteria |  |
| Create and share background information about the programs (depending on knowledge/experience of people participating in assessment) |  |
| Conduct the assessment |  |

**HOW DO I TAKE THIS BACK?**

**Here is a suggested process for identifying intended impact statements as a group.**

*It’s called* ***1-2-4-All*** *and here’s how it works:*

**1:** Each person takes 3 minutes to write possible impact statements/areas on index cards (one idea per card). They don’t have to be perfectly formulated statements at this point, just ideas of what we’re aiming for as an organization.

**2:** Pair up and share. What do you have in common? What new ideas do you have when you look at your partner’s ideas? Write any new or combined ideas on new index cards. If you’re ready to discard any ideas based on this conversation, put them aside.

**4:** Combine with another pair and lay out all your cards. What common ideas are coming up? What feels most powerful or relevant, given your work and the current context? As a group, propose one possible impact statement to the full group. Write it as concisely and as powerfully as you can.

**All:** Each group shares ONE impact statement – ideally, written on large flip chart paper so that people can see it and hear it at the same time.

**Dot Voting:** Everyone gets two votes. Have people stand up and place a dot sticker or check mark on the impact statement(s) that most powerfully represent their thinking about the organization’s intended impact. It’s OK to put both votes on one statement.

**HOMEWORK: Assessing Mission Impact**

Before session 3 each team should complete the following homework (use worksheet below):

* Finalize and refine impact framework
  + Finalize your problem statement
  + Complete your 4 assessment criteria: three intended impact statements and one excellence in execution statement
  + Using these 4 criteria, assess all the core programs: mission and fundraising.
* Send CompassPoint facilitators the average assessment rating for each program (use electronic template provided)
* If you haven’t already done so, complete financial analysis homework

**Assessing Impact of Programs: Mission and Fundraising Programs**

*Use one page per impact criterion, customized with all programs pre-populated in the left column.*

To what degree, as it’s currently executed, does this program (insert tailored criterion here)

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**Rating scale:** 1 = not much impact 3 = strong impact

2 = some impact 4 = exceptional impact

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| **CORE PROGRAMS** (Mission-Specific and Fund Development) | **Rater:** | **Rater:** | **Rater:** | **Rater:** | **AVERAGE** |
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