Getting Started: Step by Step

The Performance Practice is designed to support a continuous process of organizational learning and improvement through one or more learning sessions.

A learning session is a structured process based on surveying, synthesizing, and discussing views and inputs about principles and proof points for one or more modules (e.g., leadership, management, programs, financial health, culture, internal monitoring, and/or external evaluation).

While the Performance Practice can be used in the way that makes most sense to your organization, we've outlined the most common sequence of steps below. Organizational leadership should drive the process, although many steps and practical tasks may be carried out by a learning-session administrator.

1. **Define the learning session**

Articulate the following:

- Describe the purpose of using the Performance Practice. Do you plan a one-time deep dive or more frequent module reviews?
- Select the organizational module(s) to use
- Identify a learning-session administrator
- Decide which participants will be involved. Gaining a true picture of how an organization works typically requires involvement from a wide range of players. That said, you'll want to involve people with knowledge of the areas in question, which can mean including different participants for different modules. If you choose to work on the leadership module, for example, it's a good idea to involve the executive team and the board, but if you choose to work on the management module, it's more appropriate to involve managers and staff.

2. **Prepare your team**

Introduce the process you're about to embark upon in a way that is meaningful to those who will be involved. Lay the foundation for organizational learning by presenting the following information:

- What is the Performance Practice?
- Why are you asking staff to complete the Performance Practice? What do you hope the organization and team will gain? Emphasize how continuous improvement leads to high performance.
- Who will be involved, and what will the process look like?

3. **Ask participants to complete the Performance Practice**

Set up the learning session survey (see the User Guide p. 7) and share it with participants.

- Ask participants to complete the survey worksheet, stressing the primary importance of assessing the status or progress for each proof point by providing a rating (e.g., substantially meets, fully meets, not started) and, most importantly, their rationale for the rating, concerns, and/or suggestions. The ratings will provide an understanding of where opinions fall on a continuum, but the comments are critical to understanding the underlying "why."
- Let participants know who will see their responses, whether their comments will be presented anonymously, and how they will be shared back to the group.

4. **Review the responses**

Compile and report participant responses for each of the proof points to provide a comparative picture of assessments, reactions, views, and feedback.

The reporting app available on each of the modules pages combines all responses into a single spreadsheet. This side-by-side comparison of participant responses allows you to highlight which proof points are met, need attention, and/or require improvement. See Tips for Analysis in the User Guide. You can also delve into the responses to pinpoint:

- Themes that emerge from the comments (e.g., clear interest in doing a better job using data to inform their work)
- Areas of misunderstanding or confusion, where clarification would lead to better alignment
- Poor communication, where additional elaboration or explanation would lead to improved understanding
- Gaps or differences in opinion or understanding, where resolution may lead to improved communication, execution, and/or need for process improvements
- Suggestions made by the participants that could lead to organizational improvements
- Questions that require answers for better understanding and alignment.

5. **Share the data with staff**

Share the data with participants in preparation for discussion. It can be useful to share the following:

- Summary of the data, including themes, highlights, strengths, improvement areas, and areas of misalignment. Substantiate your conclusions by sharing the comments or rationale that led you to them.

- Share the raw data (to the extent it makes sense). You may want to remove identifying information as much as possible, depending on the comments.
- Ask participants to think about whether they agree with your conclusions, see additional themes, or have other questions about the data.
- Give staff some time to review before your group discussion.

6. Learn and improve

Facilitate one or more sessions to discuss the findings, identify the most pressing problems, analyze the root causes, and make a plan for improvement. Sharing findings with the participants and facilitating discussion sessions as the basis for organizational learning will help:

- Celebrate organizational progress and achievements
- Get everyone on the same page
- Contribute to staff development and improved understanding
- Lead continuous improvement.

The Leap Ambassadors Community's Knowledge Center includes resources to help you understand problems and define approaches to solving them.

7. Repeat

This process can be repeated with the same group at a later date. Reassessment allows you to assess the extent to which you have successfully made changes, a critical part of the continuous improvement cycle.

The process can also be done with different participants, and/or different focus (e.g., another organizational discipline). The efforts can be as big or small in scope as needed. The use of Performance Practice learning sessions can be applied to an immediate need (e.g., financial health) or a more comprehensive organizational development effort (e.g., where leadership, management, and culture disciplines are the focus over a longer period of time).

Sample Reports

With the free reporting app, you can create a report like the sample below in minutes. To create your own report, you will first need to collect your data. Go to any of the modules to get started.

Summary:
The Summary report shows the distribution of ratings for each proof point, gives a picture of the level of consensus, and opens the door to productive conversations about ways to move forward.

PILLAR 1: Courageous, adaptive executive and board leadership						
Principle / Proof Point	Not Started	Partially Met	Substantially Met	Fully Met	Not Sure	Not Applicable
Principle 1.4: Executives and boards recruit, develop, engage, and retain the talent necessary to deliver on this mission. They know that great talent is a huge differentiator between organizations that are high performing and those that aren't.						
1.4.1: My organization's CEO is deeply and personally engaged in talent recruitment and development, with an eye toward strengthening our talent base at every opportunity.	0	4	5	2	1	0
1.4.3: My organization applies professional-development and compensation practices that reflect the importance of cultivating and keeping great talent—and the disproportionate cost of losing it.	0	10	0	1	1	0
Principle 1.6: Executives and boards passionately push the organization to get better at meeting its mission and to reduce costs without compromising quality.						
1.6.2: My organization's executives regularly and rigorously analyze how we are deploying all resources—not just money but also people, time, energy, and focus—with an eye toward shifting resources to those areas that can have the greatest impact.	1	6	3	1	1	0
Principle 1.7: Executives and boards are humble enough to seek and act on feedback on their own performance and that of their organization. Even the highest of high performers know that they haven't figured it all out and acknowledge that they still have a lot of work to do.						
1.7.1: My organization's leaders are not just receptive to feedback; they actively seek it out from staff, beneficiaries, other external stakeholders, internal performance data, and external evaluations.	1	2	6	3	0	0
1.7.2: My organization's leaders acknowledge publicly where we need to improve and what we still need to understand better if we are to realize the results we seek.	1	3	7	1	0	0
Principle 1.8: Executives and boards are constantly assessing not only what the organization should be doing but also what it should stop doing, with an eye to redirecting scarce resources to the highest-opportunity areas.						
1.8.1: My organization can cite specific cases in which we have cut back or eliminated efforts we found to be ineffective, redundant, or unsustainable and/or redirected resources to areas of greater opportunity.	3	3	2	2	2	0
Distribution of ratings across all proof points	6	28	23	10	5	0

Details:
For a thorough understanding of individual perspectives, drill down to see each respondent's ratings and comments per proof point.

PILLAR 1: Courageous, adaptive executive and board leadership				
Principle / Proof Point	Name	Rating	Rationale / Explanation	Themes
Principle 1.4: Executives and boards recruit, develop, and retain the talent necessary to deliver on this mission. They know that great talent is a huge differentiator between organizations that are high performing and those that aren't.				
1.4.1: My organization's CEO is deeply and personally engaged in talent recruitment and development, with an eye toward strengthening our talent base at every opportunity.	Jenny	Partially Met	There has been significant turnover in staff and only recently has the quality of staff been up to standards for this organization.	
	Billy	Partially Met	The CEO asks the staff about processes and how they can be better in the future.	
	Ashley	Substantially Met	I believe that our CEO has worked hard to ensure that the appropriate people are in place to assist our clients. We have had to recently hire new staff and did so very deligently.	
1.4.3: My organization applies professional-development and compensation practices that reflect the importance of cultivating and keeping great talent—and the disproportionate cost of losing it.	Jenny	Partially Met	There are often opportunities to go to training for the programming that is delivered at the organization. However, more staff should be trained on how to handle mental health crises. There have been several negative instances where clients with several mental health issues and the staff is unprepared to handle issues.	
	Billy	Not Sure	I am not sure on this piece due to me still being new to the organization.	
	Ashley	Partially Met	No health insurance is a risk in retention of staff and compromises ability to attract new talent because competitor's usually offier it.	
Principle 1.6: Executives and boards passionately push the organization to get better at meeting its mission and to reduce costs without compromising quality.				
1.6.2: My organization's executives regularly and rigorously analyze how we are deploying all resources—not just money but also people, time, energy, and focus—with an eye toward shifting resources to those areas that can have the greatest impact.	Jenny	Partially Met	Staff skills and educational background do not match their job description and duties. Energy and focus does not exist because of conficting organizational mandates. Some mandates from upper management appear to be "spur of the moment" and reactionary, without much consideration of the impact.	
	Billy	Not Sure	This is an area we should pay a lot more attention to. There is a lot of duplication of services, mismanagment of human capital, our CEO takes on too many projects at once, and gets set in his way about how resources should/have been allocated. I believe his intentions are to become better at this however; he's focused on too many things to really be efficient at any one thing.	
	Ashley	Partially Met	We don't have a very active board of directors.	
Principle 1.7: Executives and boards are humble enough to seek and act on feedback on their own performance and that of their organization. Even the highest of high performers know that they haven't figured it all out and acknowledge that they still have a lot of work to do.				