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Review of *The Social Profit Handbook: The Essential Guide to Setting Goals, Assessing Outcomes, and Achieving Success for Mission-Driven Organizations*

Paul G. Putman, Ph.D., Cleveland Foundation

“Thinking about assessment feels a little like going to the dentist: We know we should do it, but it’s not what we would choose to do on a sunny afternoon” (p. 12). If that quote resonates with you, *The Social Profit Handbook* may well deserve a place of prominence on your foot-long shelf of key resources.

The *Social Profit Handbook* carries the subtitle *The Essential Guide to Setting Goals, Assessing Outcomes, and Achieving Success for Mission-Driven Organizations*. It is a minor critique, but I do wish that the author had skipped the main title and simply used the subtitle for several reasons. First, the term “handbook” connotes a more comprehensive text than this one in terms of topics covered. Second, potential readers seeking assistance in nonprofit assessment may miss this title in their search. Third, this book is more aptly described as a guide as it takes you through a series of exercises as though you were attending a facilitated workshop. That said, at its core, *The Social Profit Handbook* is a book about assessment in the nonprofit/third sector written for practitioners who might harbor some internal resistance to assessment as they have experienced it in the past. Another audience for this book is anyone who has said “we don’t have time for assessment, we are too busy fulfilling our mission/serving clients/creating art/etc.” or “assessment cannot measure what is really important to us.” In short, this book was written for executive directors, board members, staff members, and foundation officers who want to

do better but have found traditional assessment methodology inaccessible or inadequate.

Author David Grant is a teacher and consultant who co-founded the Mountain School of Milton Academy in Vermont. He also served for twelve years as the president and CEO of the Geraldine R. Dodge Foundation. Grant wrote this text about assessment because “we have to find an approach to defining social profit that gives us the incentives, the motivation, and the confidence to invest in it” (p. 2). The book’s goal is to show readers how to “measure success in a way that helps you achieve it, illustrated by examples of organizations that have done exactly that” (p. 3).

Early in the text, Grant puts forward the term “social profit” as a reworking of ‘nonprofit’ or ‘not-for-profit.’ The term has been used elsewhere and it fits well within the context of the book, which encourages readers to look at the sector from a different perspective, focusing on what *is* instead of what *is not*. Grant characterizes this as the difference between financial profit (with a known unit of measure such as the dollar or yuan), as opposed to social profit which he recommends should be reframed given the deficit connotation of the prefix ‘non.’ He calls for both qualitative and quantitative measures of assessment for social profit organizations. As there are increased calls for outcomes, metrics, and assessment, Grant contends that the response from social profit organizations should not be to become more like businesses, but to “focus

our efforts on trying to create valid and reliable measures that ‘prove’ the efficacy of what we have accomplished” (p. 12). This is not a call to eliminate quantitative measures altogether, but rather for the inclusion of meaningful qualitative measures as well.

One of the messages that resonated for me as a reader is the need for social profit organizations to take the lead on defining and assessing what matters to their mission or risk having external entities decide what measurements will be important. Organizations that have received government funding can attest that all too often those externally applied measurements often lead to a focus on compliance to minimum standards instead of inspiring improvements to the quality of service to clients. Grant notes that “measurement becomes a proxy for intention and values” (p. 20), and for some reason we in the third sector often act as though creating our own internal assessment strategies would somehow lack legitimacy. Grant posits that social profit organizations have the unique ability to create “a combination of pertinent metrics and a qualitative description for the social profit *that can only be created by the people who are providing and receiving it* [ital original]” (p. 24).

The Social Profit Handbook contains practical advice to help readers overcome their often self-imposed barriers to successful assessment practice. Chapter three helps readers examine their own working assumptions regarding assessment. Grant encourages readers to think about their history with the term “assessment” (unfortunately often connected to academic tests) and their deeply held assumptions about assessment as solely judging performance. An alternative perspective is presented wherein readers are invited to think about the purpose of assessment as being performance improvement. Another way to frame this is through the lens of formative assessment: “assessment practices whose primary purpose is to improve outcomes rather than judge them” (p. 4). This is in contrast to the more familiar summative assessment “which judges outcomes at the end” (p. 4). Both forms are useful at different times. In this chapter Grant introduces

a strategy to inspire board members and staff to become engaged and even excited about assessment without using that term and scaring off people who hold negative associations with the word itself.

The issue of time is addressed in chapter four. In brief, without real time to focus on these important issues and conversations, effective assessment cannot happen. Grant calls this “mission time,” and while that type of time is scarce in the third sector, it is crucial to complete important tasks such as creating your own assessment rubrics, which are discussed in chapter five. For those who may not be familiar, rubrics are assessment tools often used in the academic world. Grant defines a rubric as “a matrix that identifies criteria for success and describes the levels of performance in relation to those criteria along a spectrum from poor to excellent” (p. 45). I have used rubrics as an adjunct instructor, and while they do take some time to develop, I can attest that once they are in place they are immensely useful for both students and instructors as they provide a shared understanding of what success will look like before students begin the work. Rubrics are assessment tools worth further exploration within the sector.

Throughout the text Grant provides exercises that walk readers through the steps necessary to create customized assessments. If you can describe in words what matters to you, this text will help you develop a framework (assessment rubric) which will allow you to put down on paper what success can look like for you and your organization. The book uses an easy-to-understand example to help readers understand the various steps in rubric creation, and their dynamic ability to be improved over time. Voila! – Formative assessment!

Grant turns to the role of coach, providing tips and advice in chapter six. Chapters seven through nine includes examples of rubrics that improve performance representing a diverse array of programs and organizations from a neighborhood leadership program to a faith-based environmental organization. Rubrics for sustainability and for large systems are

discussed in detail. Quotes from leaders in the organizations that developed and use the rubrics provide further insights into best practices. Of special note, executive directors who crave more engaged boards may want to pay special attention to the rubric presented on pages 86-87. Another example, the Dodge Foundation's site visit rubric does a great job of acknowledging the grantor/grantee power relationship and the accompanying text notes that program team members found the rubric to serve not only as a helpful reminder checklist, but a useful document for training new program officers.

Grant closes the book with a chapter on overcoming resistance to change, a force related to lack of time. Grant states, "it may be that the *perceived* lack of time is an indicator of a *very real* resistance to change" (p. 127). He offers advice to executive directors, board members, and foundation officers who wish to do this work and build a culture of ongoing learning.

A bonus that appears in the appendix of this text is what Grant refers to as a foot-long bookshelf. The concept is simple: "if you only had a single, foot-long piece of bookshelf, and the books you put on it would be instantly known and well understood by the staff and board of your organization, what would you put on the shelf?" (p. 143). A few titles were familiar, and a few have been added to my reading list. The recommendations are certainly appreciated.

This book is worth exploring for both those whose eyes glaze over when they hear words like 'assessment' or 'outcomes' and those of us who love evaluation and assessment. It is another tool to help social profit staff and volunteers recognize that assessment can be helpful and does not have to be difficult or arduous. Weighing in at ten chapters and about 150 pages, this book is a very manageable read for busy professionals.

Grant reminds us that good assessment is ongoing, and this text presents a model upon which even the most assessment-averse professionals can build. As we work to build a stronger sector and more effective organizations

The Social Profit Handbook reminds us that "the odds for change vastly increase when there is a process that prioritizes what matters and paints a picture of the way things should be" (p. 77).

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