

# CONCINNITY

SURDNA FOUNDATION

## Accountability and Effectiveness: Success Measures at the Surdna Foundation



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What is the Surdna Foundation responsible for, both internally and externally? What are our goals and key strategies, and what resources can we marshal? How do we define “success” and how—in partnership with grantees and others in the field—are we doing?

As in many organizations, Surdna board and staff are wrestling with the accountability pandemic that is sweeping the sector. Improved accountability has been a major force behind effectiveness and outcomes measurement in many foundations. It is an issue that’s likely to gain in importance as more, not less, will be expected of philanthropy in the future.

While Surdna’s approach is somewhat driven by this external environment, it is primarily rooted in the Foundation’s impact-driven mission and organic development as an organization. Founded in 1917 and staffed in 1989, Surdna has reached a point where it simply makes sense to pause, reflect, and plan for the future. Board and staff together have gained valuable experience, and, with the maturation of Surdna’s programs, have created an arc of development to learn from and build on for the future. Surdna is also embarking on a period of transition, with the retirement of Executive Director Edward Skloot planned for 2007. Now, more than ever, Surdna’s board is committed to learning more deeply about what works, to more effectively align mission and resources at all levels of the Foundation.

Measuring success is, like community change, a continuous process. Improving the lives of children, families, and communities usually does not happen quickly; it requires many incremental achievements which, together, form a pattern of progress toward a long-term goal.

It is often much easier to define those long-term goals, which are typically so broad that they are uncontroversial. But measuring interim achievements is what allows us to really understand change over time. And certain interim achievements, such as building key capacities, can actually create the conditions that make achieving long-term goals possible.

Surdna has been engaged in a series of activities over the past several years to build key elements in its own capacity. Staff and board together conducted and learned from evaluations of individual programs, upgraded our grants management and other systems, and completed an organization-wide strategic planning process. As an outcome of that process, I was asked to design and lead a board-staff initiative called Success Measures to build on the great work done in the past and more intentionally and openly inquire into impact going forward.

With Success Measures, we’re attempting to move beyond evaluation and toward more ongoing assessment/learning and planning. Evaluation traditionally has an event-based meaning: something occurred in the past and now someone comes in to review it, for example a review of programs after five years. Measuring success, on the other hand, is more of a process. We are not attempting to substitute for traditional, retrospective, large-scale evaluations conducted by external evaluators. Instead, we are building our own capacity for ongoing assessment to inform and improve strategy development and impact, to more closely examine the real-time interaction between our short- and long-term goals, methods and tools, findings and plans for the future. Through this effort, we seek to complement external evaluation, and to create more fertile ground for learning and impact across the Foundation. We’re weaving together our theory and practice in slightly new, more results-oriented ways to:

- Help focus and improve outcomes or impacts
- Promote our programs to potential participants
- Assess program implementation
- Inform strategic planning
- Assess the quality of operations
- Help gauge grantee satisfaction
- Inform resource allocation decision-making within the Foundation

As you can imagine, the approach we’ve taken does not rest on indicators and metrics of grantee outcomes. Instead, Success Measures begins at home—with an examination of our own goals, strategies, and outcomes, with a clear willingness to test our own assumptions and try on some new ways of thinking and working. We’re having conversations at all levels of the organization to surface insights, creative tensions, and shared objectives. We are also carefully balancing our high aspirations with the reality of our resources. Above all, we are keeping Surdna’s organizational culture and “Stated Approach to Grantmaking” (see sidebar) at the heart of our work. It’s an exciting time to be at the Foundation.

With a transparent and inclusive process of engagement to get everyone on board, much has been accomplished so far. We’ve worked with all program staff to map concrete program goals and what we’re doing to achieve them; created an application and reporting system for grantees; revamped our website support for that system; improved and, in some cases, built knowledge management systems to collect and use data; improved the content of board books so that we could all better see where resources are going and what our collective intentions are; and convened our inaugural Annual Review Meeting, dedicated to sharing what we’ve learned across programs and to planning for the year ahead.

In short, we’re building practice. We know we probably won’t ever be able to provide absolute certainty about outcomes. Or fully solve the question of how much achievement and attribution accrues to Surdna if we fund only a small part of a large project. Or substitute for values and judgment brought to the process. But incorporating Success Measures reflections and conversations as a regular part of doing business has already enabled us to develop a common language and deeper understanding of our collective enterprise.

### OUR STATED APPROACH TO GRANTMAKING

We are interested in fostering catalytic, entrepreneurial programs, which offer viable solutions to difficult systemic problems. We seek, as well, high quality, direct service programs which advance our philanthropic goals.

We enjoy collaboration with our grantees and seek to work with them in supportive, collegial relationships. We recognize the importance of collaborating with other foundations to build joint, diverse programs and to leverage our funding with that of other foundations, corporations and governmental bodies.

We make both project and general support grants. We do not generally fund individuals, capital campaigns or building construction, or projects that are internationally based or focused.

We are committed:

- To respect those seeking grant monies by demonstrating promptness, courtesy, responsiveness and objectivity in assessing how their grant requests meet our philanthropic goals.

- To communicate honestly and directly with those seeking support.

- To demonstrate both accountability to and support for our grantees after a grant is made.

Foundations are uniquely positioned to develop this special kind of proficiency – to continually clarify vision, focus efforts, cultivate patience, and use resources wisely.

As John E. Andrus’s daughter Helen Benedict once said, long after his passing, “I know I’ll have to account to him for what I’ve done with Surdna.” By building on and strengthening Surdna’s effectiveness, I hope we’ll all be able to help her out a bit with that accounting.