

STEP 6:

So what?

Now it is time for all good rural endowment builders to ask yourselves how you will track your progress on your goal to see if you made any difference. This is the step that community foundations often do only casually, or not at all—which partly explains why many rural endowment efforts don't turn into well-performing engines.

Indeed, because community foundations do so many different things for so many different issues, groups, organizations, leaders, communities—and donors—in their regions, they are in the habit of saying “yes.” That's not a bad thing, necessarily, but it does keep you busy. Being busy makes it very difficult to take the time to sit and check whether or not you achieved what you set out to do in your rural endowment building effort, and reflect on what you have learned about what it will take to do it as well or *better* next time (if you even *plan a next* time).

In short, if you do not assess how—and *how well*—you are doing things, you will not develop a discipline of learning from your efforts and adjusting them so that they become more strategic and effective over time. Over time, the regular and repeated practice of *action-reflection-adjusted action* is what turns a rural endowment-building effort into a rural endowment-building engine.

Here's the good news. By going through the last five Steps, you have produced a well-detailed *goal* to track, you have chosen how you will go after that goal (*tactics*), and you have estimated the *capacities* it will take. That means you have most of the workings you need to track it.

Assessing your progress

At the end of Step 3, you chose a rural endowment-building goal in this form

To build rural endowment and enhance rural vitality, we will raise _____ dollars from _____ donors (number and type) through _____ type/mix of funds over _____ time..

In Step 4, you chose a specific tactic or set of tactics, and in Step 5, you estimated the resources it would take for you to implement your tactic in pursuit of your goal.

Let's turn all of this into a table that might help make tracking it at least *seem* manageable.

Step 6

Endowment performance

Endowment goal	Time					Compared to goal
	Starting gate	Checkpoint 1	Checkpoint 2	Checkpoint 3	Finish line	
Total dollars						
Fund type 1: <ul style="list-style-type: none"> ■ # of funds ■ # of dollars ■ # of donors 						
Fund type 2: <ul style="list-style-type: none"> ■ # of funds ■ # of dollars ■ # of donors 						

Capacity performance

Tactic(s) capacity assumptions	Time					Compared to goal
	Starting gate	Checkpoint 1	Checkpoint 2	Checkpoint 3	Finish line	
Staffer 1: Time						
Staffer 2: Time						
Staffer 3: Time						
Board members: Time						
CF budget Expenses						
Partner resources						
In-kind resources						
Policy/ procedure 1 to track or improve						
Policy/ procedure 2 to track or improve						

Here's how your team can use this tool to improve your efforts over time.

a) Put the plan on paper. Fill in your goal (from Step 3) and capacity assumptions (Step 5) related to your tactics in the first column. Of course, tailor the headings in the left column to suit your particular goal and tactic(s). And add rows as needed.

b) Set some checkpoints. In your goal, you set a timeframe. Assuming that timeframe tells you when your "Finish Line" is, choose some checkpoints between now and the Finish Line (Every six months? More often? Less Often?) at which your team will agree to look at your progress to date.

Checkpoints should be chosen as meaningful time periods within your goal timeframe. They should be long-enough intervals for something worth tracking to have happened. They should also be frequent enough within your timeframe so that you can make a mid-course correction if something is seriously awry. For example, let's say you assumed at the outset that implementing your tactic to achieve a one-year goal would require no time or involvement from board members; if you find after six months that the only rural endowment that has come in with this tactic was largely due to three incidental board contacts, you might want to change your assumptions now!

c) Assign some trackers. Have your team figure out who will be responsible to track the details for different rows in the chart. Ask them nicely if they will do so, and if they need any special help from staff, board or systems to get their "count" accurate.

d) Check your progress. Gather your team at each checkpoint. Look at the numbers and ask:

1. Are we on target with our goal?
2. If *yes*,
 - Are we on target with our use of capacities as well? If not, what can we adjust to make more or better progress?
 - Is there some aspect of implementing our tactic that is just not working? What is it? What can we do to address it? Can we eliminate it?
 - Is there some aspect of implementing our tactic that is working even better than we expected? What is it? What can we do to capitalize on this further to improve on this goal or other rural endowment goals?
3. If *no*,
 - Are we on- or off-target with our use of capacities as well? What can we adjust to make more or better progress?
 - Is there some aspect of implementing our tactic that is just not working? What is it? What can we do to address it? Should we eliminate it? Should we add something else?

Step 6

- Is there some aspect of implementing our tactic that is working even better than we expected? What is it? What can we do to capitalize on this further to improve on this goal or other rural endowment goals?

e) At the finish line...Reflect. Gather your team again at the end of your goal period.

Look at your performance and:

1. Ask yourselves all the questions from (d) in relation to your *final* performance.
2. Reflect on all your assumptions about capacities and all the adjustments you have made over the course of the goal time period. What are the factors (or changes) that seem to have made the *most difference* in your outcome (good or bad)?
3. Think about Steps 1 and 2 in this *Framework* process. Are there any changes in what you know about your foundation or your environment that have happened over the time period of this goal that will affect its revision?

f) Revise your goal! Then go through Steps 4-6 again!

g) Repeat (a) to (f) as necessary!