# Measuring *Bottom Line* Results
# Financial Performance

## EXERCISE INSTRUCTIONS

- ✓ **Column One: list you organization's Core Values**
- ✓ **Column Two: list the Indicators, which describe how the organization adheres to these values**
- ✓ **Column Three: convert the indicators into measurable Metrics**
- ✓ **Column Four: which metrics can be measured in terms of Financial benefits?**
- ✓ **Column Five: which metrics can be measured in Non-Financial terms?**

## Reminders about Values, Indicators and Metrics

## Values

Values are human behaviors, which are sacred to you and hopefully, but not necessarily, your employer. Examples include: honesty, trust, openness, respect, fairness, accountability, reasonable shareholder return, protect natural environment

- ▪ Values <u>are not</u> an organization's goals, e.g., to be profitable
- ▪ Values <u>are not</u> an organization's objectives, e.g., to increase market share X%.

## Indicators
- ▪ Suit an organization's culture
- ▪ Describe how the organization's practices demonstrates its values
- ▪ Are explained clearly and simply

## Metrics
- ▪ Are the baseline from which to measure continuous improvement
- ▪ Realistic to achieve
          Easy to measure (Quantitatively or Qualitatively)

# Sample Matrix

| Core Values | Indicators | Metrics | Monetizable Benefit (quantitative) | Non-Monetizable Benefit (qualitative) |
|---|---|---|---|---|
| Knowledge and professionalism | -Hire and promote qualified people of different gender, age, backgrounds, and personal and professional experiences<br>-Explicitly encourage and reward employees for generating new ideas, making decisions, being creative<br>-Pay for education and training that advance employee's knowledge and skills | Women and men, including people of color, hold comparable mgmt positions and are compensated fairly | Lower turnover and higher retention | Employees feel valued for their knowledge and experiences |
| Act responsibly in the communities where we live and work | -Solicit concerns and opinions of community residents on the impacts of Co. operations<br>-Monitor on-going environmental performance; reports results to residents<br>-Support development of local services that the community can own and manage into the future<br>-Protect rights of indigenous peoples | Bi-monthly mtgs w/ residents to review progress toward protecting drinking water | Fewer costly disputes with local gov't | Positive reputation among community residents and leaders |

# Exercise Worksheet
## Your Organization

| Core Values | Indicators | Metrics | Monetizable Benefit (quantitative) | Non-Monetizable Benefit (qualitative) |
|---|---|---|---|---|
|  |  |  |  |  |
|  |  |  |  |  |