



helping you do better what you do best



Cass CCE
Centre for Charity Effectiveness

Proving and improving our worth: performance management

Rosalind Oakley

Principal consultant CCE

Chair, Charities Evaluation Services

What is performance management?

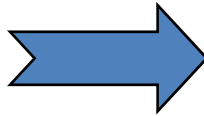
Performance is the extent to which an organisation achieves its mission and furthers its cause

Performance management involves taking steps to achieve your mission more effectively

Source: Performance Hub

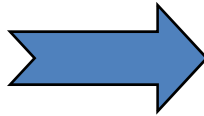
Why is it important?

Learning and
development



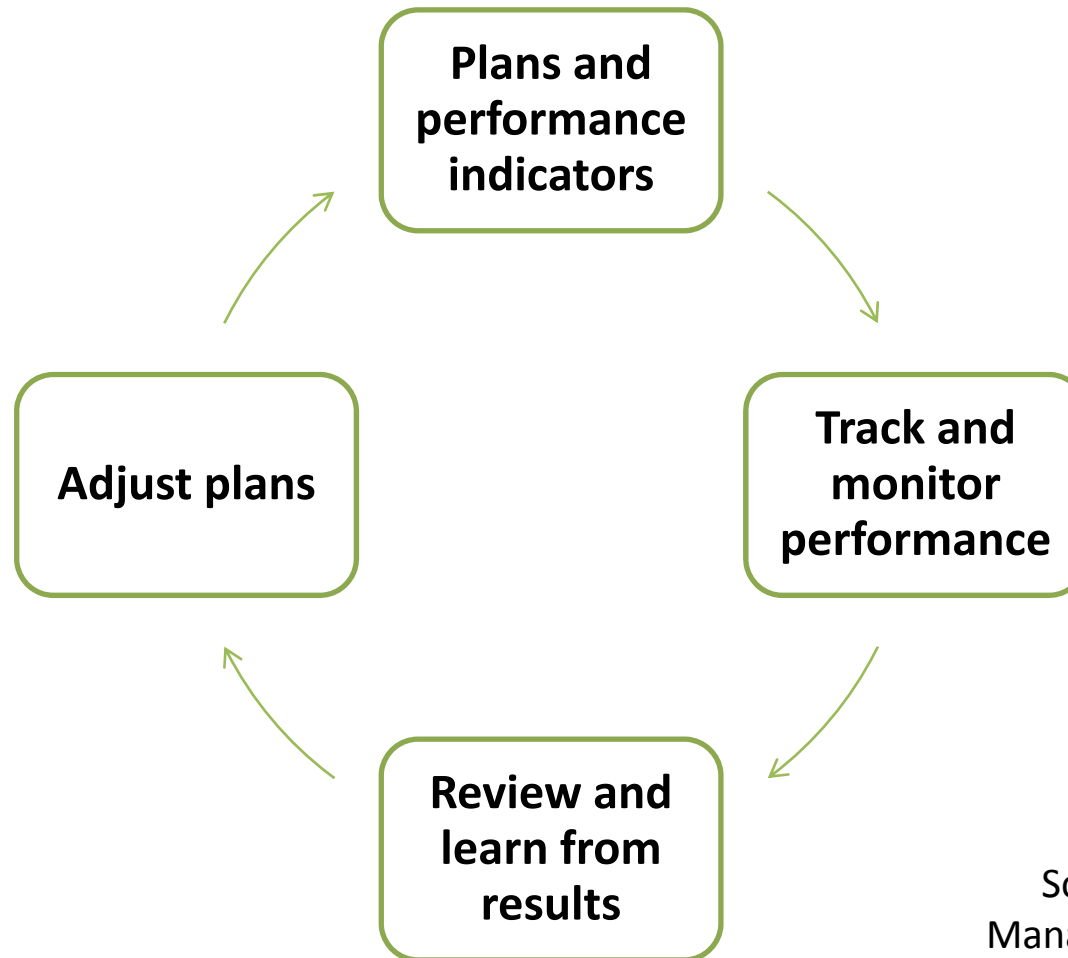
fresh thinking, clarity
about the future, improve
performance, show
effectiveness, improve
services

Accountability



users, staff, trustees,
volunteers, community,
funders, charity
commission, etc

The performance management cycle

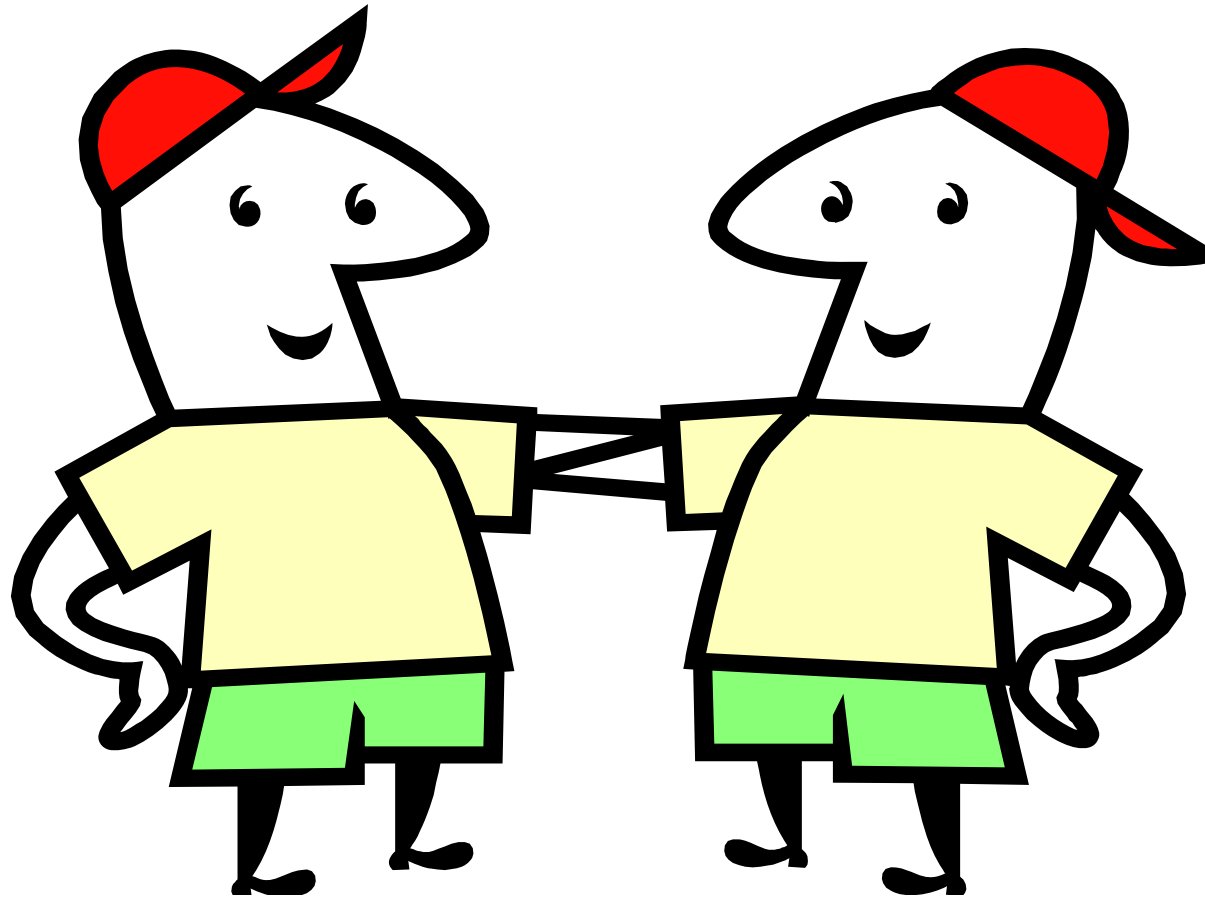


Source: Mike Hudson
Managing without Profit

Performance improvement tools

- Strategic planning
- Benchmarking
- Marketing
- Scorecards
- Quality systems
- Monitoring and evaluation

Monitoring and evaluation



Third sector evaluation approaches

Type of approach	Used by
Aims and objectives	69%
Case study enquiry	27%
Logical framework	11%
Social accounting	9%
Balanced scorecard	9%
Theory of change	7%
Appreciative enquiry	7%

Source: *Accountability and Learning: developing monitoring and evaluation in the third sector* (Ellis and Gregory, CES 2008)

Context: the drive for effectiveness

- Regulatory
- Funders



Where are we now?

- Growth in knowledge and support for monitoring and evaluation
- Outcomes
- Dominance of funder requirements
- Data issues
- Resources
- Balancing accountability and learning

Source: Accountability and Learning: developing monitoring and evaluation in the third sector (Ellis and Gregory, CES 2008)

Benefits of evaluation

- Being clear about the benefits of their work
- Learning about what is working well/effective practice
- Improving the end result for beneficiaries
- Better services/strategic planning
- Improving the way they worked
- Telling others about the results
- Competing for funding and resources
- Improving reporting to funders.

Source: Accountability and Learning: developing monitoring and evaluation in the third sector
(Ellis and Gregory, CES 2008)

Barriers to monitoring and evaluation

- Time 76%
- Data collection and analysis 50%
- Money 39%
- Identifying outcomes and impact 39%
- Skills 35%

Source: Accountability and Learning: developing monitoring and evaluation in the third sector
(Ellis and Gregory, CES 2008)

Where next?

- Skills and resources
- Use external support effectively
- Funding for evaluation
- Outcomes and impact
- Taking a longer term view
- Use IT to support evaluation
- Share learning with each other

Concluding points

- Balance 'proving' and 'improving'
- Tailor your approach to your resources
- Do not overcomplicate
- Involve and listen to key stakeholders especially those who collect data
- Consider external support
- Build the culture



helping you do better what you do best



Cass CCE
Centre for Charity Effectiveness

Proving and improving our worth: performance management

Rosalind Oakley

Principal consultant CCE

Chair, Charities Evaluation Services

Websites

Charities Evaluation Services

www.ces-vol.org.uk/

New Economics Foundation

www.proveandimprove.org/new/index.php

New Philanthropy Capital

www.philanthropycapital.org/

NCVO

<http://www.ncvo-vol.org.uk/>

New publications

- **Assessing change: developing and using outcomes monitoring tools**

Diana Parkinson and Avan Wadia (CES October 2010)

- **Does your money make a difference?**

CES October 2010

- **Social Return on Investment for funders**

NPC September 2010