

PERFORM

**Updating, briefing and feedback event
Thursday 8th December 2005**

Event Feedback

This event was held at the Aston University Lakeside Conference Centre in Birmingham and involved 48 participants. The aims of the day were:

1. To update participants on the recent developments of PERFORM
2. To share the experience of piloting organisations and lessons learnt
3. To explore discussion points and ideas about further development and implementation of PERFORM with the VCS infrastructure sector.

This report focuses on Aim 3 by summarising key points raised in group discussions, the panel session and the individual evaluation sheets completed at the end of the day.

Common points

- PERFORM is useful as a tool to focus us as infrastructure organisations, especially in periods of change
- Range of benefits as a planning tool, training tool and pitching to funders tool. It needs to be promoted to the sector in this way
- A strategic planning tool not a Quality Standard
- PERFORM framework is useful but flexibility is key
- Timing is important – significance of when to implement framework
- Difference between PERFORM and other systems needs to be clarified and sold
- Clarity needed about where PERFORM fits with Quality Assurance systems
- How it fits for those organisations that are a mixture of infrastructure and service delivery
- Performance Improvement Hub should identify/propose resources for roll-out
- Resources implications – especially for organisations that are not quite ready to make the step-change
- VCS needs training about outcomes
- Outcomes awareness training needed at beginning
- Needs specific support from funders e.g. in relation to forms of data to evidence outcomes
- Importance of and need for peer support (pilots found this useful)
- Ongoing support for groups implementing PERFORM
- Need for resources, mentoring, etc
- Broaden network and provide tailored support – would be useful for roll-out

Group discussion feedback:

How useful and feasible is it to have a common framework for VCS infrastructure?

Overall feedback indicates that most participants were positive about the usefulness of a common framework for infrastructure along the lines of the proposed PERFORM framework. However the flexibility to adapt such a framework to the particular context and purpose of the organisation itself was seen as critical to its feasibility.

- Some degree of commonality is useful.
- Very useful if can adapt – the key is if it is flexible.
- General framework useful to aspire to – mustn't be too prescriptive – a starting point.
- Very useful at Higher Level Outcomes (HLOs) level – feel it will help strengthen the voice/action of VCOs. Perhaps need to make it more explicit that HLOs are common and all can sign up to them, but that other aspects of the framework are more flexible and can be tailored to meet the needs/specific outcomes of the Infrastructure Organisation.
- All aspire to high level outcomes – change in how carried out.

A common outcomes based framework was seen to have particular benefits in supporting effective strategic planning both by individual organisations and by consortia of infrastructure providers.

- May help organisations not to chase funding for its own sake. Organisations will look at themselves and clarify direction.
- A way for infrastructure to refocus in periods of change. We can lose focus – different funding streams – keeps us focused.
- Useful to use it for internal focus, which in turn can benefit externally.
- Useful in highlighting gaps in strategic planning – systematic.
- Could be used by a 'collective' of organisations (eg. ChangeUp consortia).

In addition to this strategic planning purpose the framework was also seen as useful in promoting and increasing understanding of infrastructure with different stakeholders.

- Useful to have a common language – internal, also useful externally.
- Common HLOs will help other stakeholders better understand what Infrastructure Organisations do.
- Framework of core functions helps councillors and officers have confidence in supporting infrastructure.
- Gives credibility – we'll all be saying the same thing. Will help to deflect criticism.

Reservations about the feasibility of the framework mainly related to resource and capacity issues.

- Training in outcomes before embarking on this will be beneficial.
- Difficult to measure outcomes sometimes.
- Challenge in terms of resourcing/level of development across a range of diverse organisations - potential issue for a 'common' framework.
- Task to convince organisations to undertake.
- Perhaps lack of knowledge /capacity.

Can you see PERFORM being useful to your organisation – is it something you could buy into?

Group responses to this question indicate that most participants could see ways in which PERFORM can be of use to their own organisation.

- Yes. Most infrastructure organisations don't have a tool to help them focus broader than quality standards on: outcomes; stakeholders; and strategic planning.
- Could be used as a training tool for planning and assessment.
- Presents an opportunity to raise profile of 'why' infrastructure both to funders and the wider VCS.
- Used as 'pitching' tool with funders.

However a number reservations and concerns were also raised which, unless they are addressed, may deter some organisations from using the framework. The two key concerns appear to be retaining flexibility in how organisations use the framework and the need for greater clarity and guidance about the link between PERFORM and other frameworks and tools.

- Some people round the table will use it, some will investigate it further, some will use some aspects of it. A tool for stimulating ideas. Wait and see how it develops.
- Yes if: it is relatively easy to use; it has wide recognition and acceptability and links with other tools; it retains it's flexibility; and adequate support is offered.
- No if: it's just another tool and offered without support as an off the shelf package.
- How does it fit in with everything else out there? PQASSO, IIP, etc. Especially when have ongoing commitment to other systems.
- Are there issues around funders preferring organisations to use one particular system?
- Implications for organisations who are doing direct delivery as well as providing infrastructure. Could end up having several frameworks in place running side by side.
- My key concern: it is vital to do the final bit of piloting which was to show the evidence/demonstrating of outcomes.

What would encourage you to implement PERFORM – what would you need to make it work?

Most responses to this question were suggestions for the different forms of support that would help organisations to implement PERFORM. A number of recurring themes emerge which indicate the need for a range of support mechanisms. Feedback indicates that the provision of an appropriate mix of support and resources is going to be critical if PERFORM is going to be effectively implemented by infrastructure organisations. Suggestions included the following:

Training

Most training suggestions were for outcomes training particularly for those organisations who are taking an outcomes approach for the first time.

- Very early training in outcomes.
- Training in outcomes approach required for staff and boards before begin.
- Training/on-going support on developing an outcomes focus.

Opportunities for networking /collective learning

- Learning set – setting up to take people/organisations through the process.
- Workshops to learn from each other.
- Annual workshop – importance of identifying evidence as most pilot organisations struggled with this and indicators.

Peer support and mentoring

- PERFORM champions, 'grow your own', 'consultants' to help with facilitation. These would be people who had already been through the process.
- People who've been through it helping you to understand how it can fit in with your existing quality standards.
- Doing more joint working – keeping within the sector i.e. Buddying scheme that pays for expertise within the sector.
- Agreements with other organisations (Peer support.).
- Using within consortiums – those who are strategically strong working with and leading others.

Guidance materials

- Simple process – jargon free – mediate and translate to enable people to use it.
- Identify and clarify how PERFORM links with other quality assurance and other accreditations, standards, policy frameworks, etc. Permission around appropriateness – help to define what is appropriate to an organisation / scalability.
- Need more ideas about how to consult with members.
- Examples and case studies.
- Case studies of difficulties and how they have been overcome.
- A strategic planning workbook, monitoring and evaluation workbook, evidence gathering workbook (ie. guides).
- Online resource for advice, exchange, closed questions, open debate.
- Need information about realistic timescales required to introduce and implement the system.

Support from funders and others

- Explicit support from funders for outcomes working and the consequences of that (ie. 'soft' data, lower numbers?).
- More general acceptance/understanding of having an outcomes focus and what that means.

How could PERFORM be best promoted to the sector?

Responses to this question flagged up the need to focus on three aspects of PERFORM in promoting to the sector. Firstly being very clear about both what PERFORM itself is and is not (a strategic planning tool and not a quality standard) and how it complements and relates to quality standards and frameworks used by infrastructure organisations. Secondly why organisations should use it i.e. the ways it can be used and benefits of use with real examples. And thirdly what support is available to support those organisations implementing the framework.

What it is?

- It is a tool for strategic planning, NOT a quality standard.
- Need to get the language right and absolute clarity about what it is (strategic development tool? a performance improvement tool? How does it link with quality assurance systems/frameworks, both in terms of processes and language?).
- Clear about link with other frameworks.

Benefits of using

- Examples of where it has worked and benefits (ie. able to attract additional funding/contracts).
- Aids an organisations credibility.
- Aids ability to work with partners (everything in the open increase self-knowledge and confidence).

Support available

- National Hub needs to recommend to Capacity Builders/ACU that resources are needed to roll-out PERFORM – a days outcomes training, telephone support from champion, 1 or 2 days facilitation.
- PERFORM champion per Consortium – trained and able to deliver to others.
- Use existing networks/PERFORM champions.
- Best advocate – an organisation who has gone through the process.

Additional points made

Link to other quality systems

Both Volunteering England and NACVS are intending to carrying out 'mapping' work to track and be able to show the links between their own quality systems and PERFORM. NACVS reported that so far they have found that PERFORM and the NACVS standards 'fit together like a glove'. Need to remember that PERFORM is a strategic planning tool related to infrastructure and that relationship with internal standards such as PQASSO will be 'quite mild'.

Costs of and funding for implementation

May be useful to include in guidelines an outline of the potential activities in implementing PERFORM that need to be costed. Need to bear in mind cost implications of a move to assessment of outcomes that may entail the need to involve and collect evidence from a wider sample of stakeholders than previous exercises.

ACU and Hub Management Board want PERFORM to be part of the Hub. Roll out of PERFORM not presently budgeted for and clarification is still needed about what support is needed and how PERFORM can best be developed.

It was stressed that any roll out plan developed would need to spread resources over 3 years so that organisations have the flexibility to link implementation of PERFORM with their own strategic planning cycles.

Feedback from individual evaluation – common themes:

Has the day been useful and if so in what ways

Nearly all participants described the day as useful.

- *"Hearing the experience of pilots."*
- *"Hearing other peoples thoughts and questions."*
- *"Realising what I have learnt, as a pilot through the process."*

In what ways could either the pre-event materials or the event itself have been improved in terms of information sharing?

Again comments were mostly positive but one or two improvements were suggested.

- *"Market place could have been longer."*
- *"Panel questions could have been posted in advance."*
- *"First part of day slightly repeated materials sent out in advance."*
- *"A lot of material sent out before, would have helped to have guidance about what needed to read."*
- *"Materials could be presented in a more digestible form."*
- *"Would be useful to include participants contact details on list."*

What will you take back to your organisation and what might you do next?

Ideas included the following.

- *"Propose PERFORM as our strategic planning tool for the business plan we need to write. I also want to propose this framework as an assessment tool for our consortium."*
- *"We will take the framework back and look at the process of implementation – I am very interested in using the framework for both the consortium and Ncompass."*
- *"I hope to use the PERFORM framework as the basis for developing our new strategic plan (due to be launched in 2007)."*
- *"Use summary of PERFORM to share with other infrastructure organisations in Wolverhampton. Share tool with own organisation and plan how to implement it/ negotiate with funders on core funding of WVSC."*
- *"I will feedback to the South Yorkshire Quality Project and South Yorkshire Quality Consortium. I will continue to keep people informed of PERFORM framework"*
- *"Discuss within the ChangeUp Consortium."*
- *"Share internally within Cheshire County Council as part of developing strategy for relationship with community & voluntary sector and as part of Compact development/implementation."*
- *"Although as the Charity Commission we are the sector regulator, our particular team is also involved in supporting charities and in that way PERFORM could be useful – at least in its principles."*
- *"As a funder, I'd raise awareness of the framework within the organisation and once the framework is in place I could signpost organisations."*

What are your key ideas / concerns that you hope will be taken up in the further development / implementation of PERFORM?

- *"PERFORM is really distinguished as something different to other planning tools, impact measurements and quality systems already in the sector."*
- *"Clarity about who it's for and what's in it for them."*
- *"Hope that PERFORM becomes a flexible tool but retaining the high level outcomes in a consistent format."*
- *"Keep the flexibility."*
- *"Must clarify which I elements are recommended, which are adaptable, which are optional, etc. Must make recommendations about resources for rolling out PERFORM and not just relying on mentoring and peer learning as cheap option."*
- *"Sustainability should appear in the flow chart and framework."*
- *"Volunteering development function should be imbedded (for integrated CVS/VC's)."*
- *"Clarification of PERFORM as a framework within which other processes can nestle eg. PQASSO for quality planning, IiP for HR planning and org development etc."*
- *"How it fits in with other quality standards and what crossover there can be."*
- *"Devise a simple description of what different systems are for (eg. PQASSO, different QA standards)."*
- *"How does it fit with other standards that we use. Link this with LAA indicators/outcomes."*
- *"Provide groups with support in identifying suitable performance improvement/quality tools and frameworks – this is the first step and need to be clear about what each 'tool' can do."*
- *"Need more marketing/promotion of what an infrastructure body is or does – something even punchier than the high level outcomes – lots of examples and indicators on a website."*
- *"Timing is the key – materials and training are needed and must be clear"*
- *"Guidance on readiness for using PERFORM (eg. What pre-conditions needed, what is best timing)."*
- *"Ensure all organisations have access to support in implementing PERFORM."*
- *"Outcomes training in the context of PERFORM."*
- *"The idea of a wider training course with PERFORM at the heart – a management training course with market value for professionals in the VCS."*
- *"Look at simplifying terminology. Start collecting tools/templates/examples of good practice so you can develop support resources."*
- *"Support – sharing ideas/challenges through network events, etc. Outcomes training - 'introductory' tailored sessions."*
- *"It would be very useful to know which other organisations are using PERFORM to enable us to explore informal peer support."*
- *"More resources, financial and human, to help us implement PERFORM."*
- *"Implementation of PERFORM needs resourcing."*
- *"Costs of gathering data on indicators – still a bit of an unknown."*
- *"The cost of implementing PERFORM."*
- *"Will it get implemented without the financial support that pilots got?"*
- *"Funding – maybe asking for ChangeUp plans to include PERFORM in."*
- *"Funding to implement process and funders to 'buy' into the concept."*
- *"Ensure flexibility of PERFORM is not compromised."*
- *"Concerned that there is a lot of work to be done with funders (eg. Can't see the LSC changing their approach)."*
- *"That the Hub and Capacity Builders take this forward."*
- *"National Hub to take responsibility of ensuring PERFORM is rolled out to all the regions."*