Performance Management: what can be learnt from UK Charities?

This paper looks at best practice Performance Management across a sample of charities that can be applied across the public and wider charitable sector. For too long Government and charities have looked to the Private Sector to lead the way in Performance Management. Under the banner of New Public Management the efficiency and effectiveness of business has been held up as an example to the public and charitable sector. However, the debate around the relevance of Public Management teachings is increasingly being brought into question. Moreover, amid the current austerity measures the public and charitable sector is increasingly being asked to evidence their outcomes. With greater collaboration being advocated across all sectors, against a backdrop of widely publicised Government service failures; is it about time we looked to our charities for some lessons in Performance Management?

1. Introduction

The remit of this research is to highlight best practice Performance Management [1](PM) across the charitable sector as a foundation to the market approach of competition and choice. Section 2 provides a summary of the research methods used to inform this paper. Section 3 presents a contextual analysis of the rise of New Public Management (NPM) and the Balanced Scorecard (BSc). This contextual analysis then leads to a rationale for better PM, to change current practices and to adopt new foundations to PM that can be found across the charitable sector.

In Section 3, 4 and 5 the paper identifies three best practice examples of PM practices across the charitable sector: 'tethering' PM to the organisation's mission; having more meaningful and appropriate data; and focussing PM on the clients' needs. These recommendations provide a basis to PM that will lessen service failure, improve PM and service quality, as well as develop a more fertile environment to instil greater 'impact measurement'.

2. Methodology

The methodology for this research was based on a review of relevant secondary sources relating to past and present PM practices across the public, private and charitable sector. Having established a contextual overview, primary research was then conducted in the form of fifteen interviews with stakeholders from across the debate. The size of these organisations is based on the definition used in the National Council

[1] *Performance Management refers to aspects of performance measurement for the purposes of monitoring and evaluation, rather than, more broadly, to organisational and human resource management.*

for Voluntary Organisations (NCVO) Almanac (NCVO 2014a), across four categories of stakeholders (QUANGO, Charitable, Private & Public). A breakdown of the numbers of interviews conducted according to these categorisations is shown in the table below:

	QUANGO (Inc. Umbrella bodies & non-departmental public bodies)	Charitable (Inc. social enterprises & charitable companies)	Private (Inc. Private & consultancy firms)	Public (Inc. Public universities & Local Authorities)
Micro (Income less than £10,000)				
Small (Income £10,000 to £100,000)		2		
Medium (Income £100,000 to £1 million)		6		
Large (Income £1 million to £10 million)	3	2		1
Major (Income more than £10 million)			1	
TOTAL	3	10	1	1

Table 1. Breakdown of interviews conducted

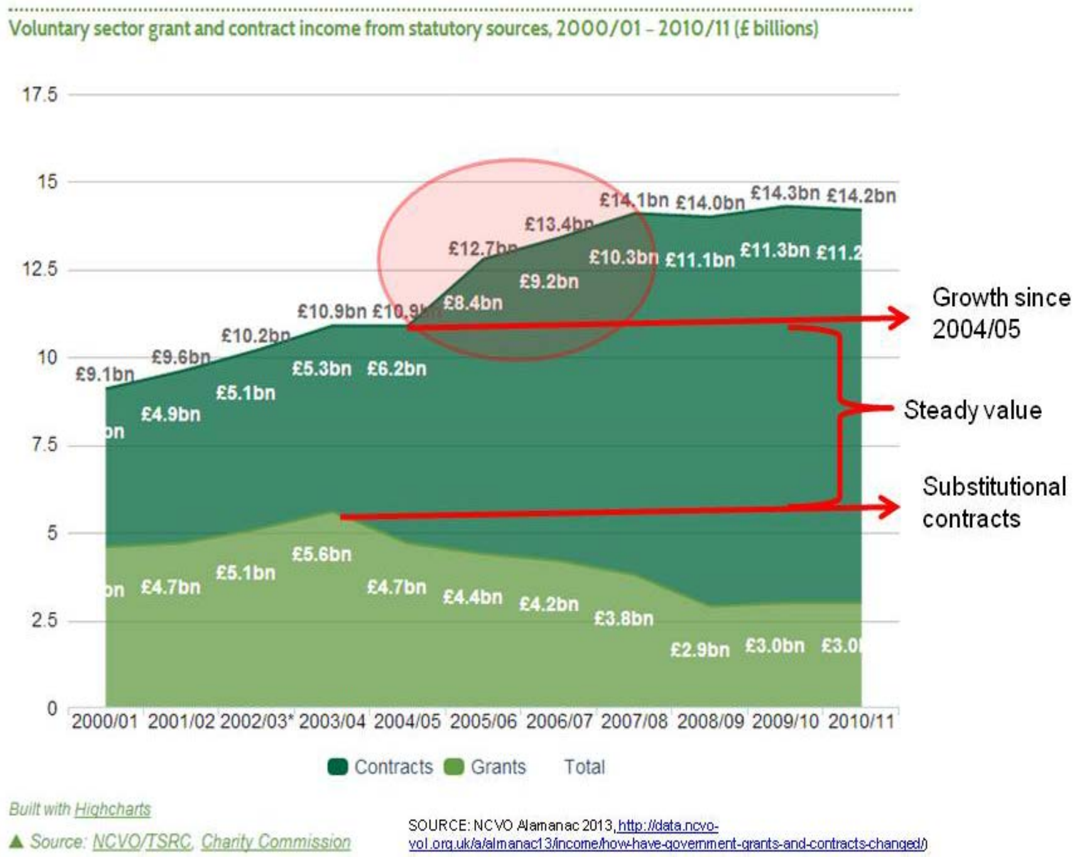
This included interviews with charities across London and Birmingham of all sizes and structures, from grass-roots to nation-wide, across a variety of service provisions. Interviewees also included experts in the field of performance management as well as organisations who advocate and represent charities, and those who work with charities. The line of questioning focussed on PM practices and the strengths and weaknesses of the approaches discussed. Discussions with wider stakeholders concerned the rationale for working with charities and the implications for PM within the current social and economic climate.

3. Performance Management across the Charitable Sector – the context

During the New Labour Government came the idea of greater partnership working across economic sectors and services under the 'Third Way' (Anheier, 1999: iii). Against the greater contextual development of Globalisation (Giddens, 1999:7), New Labour wished to create a new role for the charitable sector of not simply offering them as a choice in the provision of public services, but instead to be directly involved in the development of local and national policy. Although this marked a more prominent role for the sector, the reality did not fully realise the potential (Manville et al, 2003:1).

Under the current Coalition Government came the 'Big Society' Agenda '*empowering individuals, communities and organisations, promoting greater responsibility, and access to their information'* (Ishkanian & Szreter, 2012:20). In a speech made to the House of Commons in February 2011, David Cameron talked of how the charitable sector were a key part of Big Society in bidding to provide services and in their role as *"a vital and vibrant part of civil society"* (House of Commons, 2013a).

Along with Big Society came the 2008 global financial crisis, which many predicted would expand the role of the charitable sector in a '*tripartite arrangement with the public, private and voluntary sector*' (Manville et al, 2003:2), as more public services were contracted out. The data confirms these predictions, with an increased ratio of contracts to grants being awarded to charities and a 151% increase in contract income from government since 2000/01 (NCVO Almanac 2013), as shown in the graph below.



This data demonstrates the value of Government grants and contracts from 200/01 to 2010/11. What can be noted is the gradual increase in grants and contracts up until 2003/04, from which point onwards grants gradually decrease and contracts increase. As grants decrease and are seen to be substituted by contracts, the value of contracts are seen to be steadying. What can be projected from this data is that the requirement for effective performance management under contract agreements is not showing signs of abating. Instead, the requirement for the charitable sector to effectively demonstrate the difference that their work is making in order to deliver services through Government contracts is increasing.

'*With regard to public service delivery and the constraints now being placed on funding and execution of these vital services, it is of paramount importance that the third sector does not make the same mistakes in performance measurement and management'.*

(Manville et al, 2003:2)

The charitable sector are at the centre of a requirement of better performance management with the shift to contract agreements and increased working with the private sector, as part of 'tripartite' working. Furthermore, the 2008 global financial crisis and consequent austerity has meant changes to welfare provision and a demand for Government to become more efficient in the spending of taxpayers' money. Blyth (2013) describes 'austerity' as:

'*a form of voluntary deflation in which the economy adjusts through the reduction of wages, prices and public spending to restore competitiveness, which is best achieved by cutting the state's budget, debts and deficits*' (Blyth, 2013:2).

One of the consequences of the austerity policy has been the fall in Local Authority, Police, NHS and Welfare budgets (BBC News 2013a). With these cuts in budgets comes the increase in contracting out of public services at a presumably cheaper cost, most often to the private sector, as seen through the Work Programme (Cordella & Willcocks, 2010). This view was compounded in interviews with private companies who currently deliver government public service contracts, where the view was of a business looking to increasingly work, engage and collaborate with the charitable sector in order to utilise 'grass-roots, trusted status' amongst clients.

"The reason we work with charities is that the walls of the prison are very insular, we can't see much beyond them and it's much more difficult for us to reach out into the community and find out what goes on in the community, so 98% of prisoners will get released into the community at some stage of another and so what we need to understand better is what's going on in the community and how the community can help us and that's why we engage with the voluntary sector."

(SOURCE: Major private company delivering public services)

From further interviews it was also widely recognised that more and more private sector firms contracted to deliver public services were subsequently sub-contracting this delivery to the charitable sector:

"the way things are now, it's very difficult for small organisations to win contracts, I think previously that has been the case and it probably was for us . . . The only public service contracts that we're delivering on now is as a sub-contractor for the NHS around alcohol outreach and hospital liaison and they're sub-contracting to another voluntary organisation."

(SOURCE: Medium charity)

Some commentators have already picked up on some of these observations (Manville et al, 2003:2-3):

'At the present time public outsourcing contracts in the UK are worth more than £3.7bn annually, making the UK the largest outsourcing market outside the US. This means that services at one time provided by local government are instead being put out to tender, in turn creating massive opportunities for voluntary, community and private sector organizations and actors to shape public service delivery.'

(Wilkins, 2013, LSE Public Policy Blog)

What this demonstrates is that the requirement for better PM, to achieve better services with fewer resources, is not going to subside. One final point relates to the current situation regarding PM across the public and charitable sector. At the time of writing the charitable sector is facing a barrage of 'impact measurement' rhetoric (The Guardian 2007a). Under this sector-wide development, the focus is on measuring '*the difference being made'* (Inspiring Impact 2013b), with greater focus on measuring outcomes instead of outputs. Although this development marks a positive shift for the sector to be addressing PM in a more collaborative and holistic manner, the initial response to this initiative has been poor; *'despite the recent growth in impact measurement, practice and understanding are inconsistent'* (TSRC, 2013a). A recent report by the Third Sector Research Centre (TSRC, 2013a) found that Charities find the approach being advocated confusing and difficult. Although the idea of Impact Measurement is admirable, in reality it is proving difficult to implement, particularly for smaller charities.

This paper looks at the existing strengths of the charitable sector and advocates that these strengths provide the basis for the biggest development in PM since the Balanced Scorecard (BSc) (Kaplan and Norton, 1992). The strength of the widely used BSc is its' collective approach to PM '*which recognises the balance of objectives in four key areas of a business: Customer perspective, Internal perspective, Financial perspective (&) People perspective*' (Taylor & Baines, 2012:114). However, recently there have been concerns about the application of the BSc leading to staff '*hit(ing) the target, but miss(ing) the point.'* (Gov.UK, August 2013:7). In this context, this report seeks to offer recommendations of organisational foundations have been successfully implemented across a sample of charities, as a model for the wider charitable and public sector. The overall aim of this research is to advocate a step further than learning from business by looking to their closest relation; the charitable sector. By highlighting the strengths to be found in PM across the charitable sector this research also hopes to contribute to a better relationship between charities and government, as a more understanding and positive approach to taken by both parties and potential for learning is embraced.

4. Best Practice One - 'Tethering' performance to Mission

The existence of an organisational mission is by no means unique to the charitable sector, indeed 'mission' serves a function across the economy. A mission statement "*tells two things about a company: who it is and what it does*" (Falsey, 1989: 3). Furthermore, according to Williams:

> '*(T)his definition holds true regardless of whether a corporation refers to this statement as a "mission statement," a "mission," a "credo," "our philosophy," "core values," or something else*' (Williams, 2008:96).

The benefit of having an organisational mission has also been examined, with Bartkus et al. stating that:

> '*(They) enable current and potential employees, managers, suppliers, customers, and investors to self-select into the firm (to determine whether they want to get involved with it). . . . Ultimately, if stakeholders are able to align their individual objectives with those of the firm, the result would more likely be an intrinsically motivated shareholder group'* (2000: 29).

Although the benefit of having an organisational mission is apparent across all sectors of the economy, we will begin by looking at the unique way that the charitable sector uses their mission. The charitable sector differs in its' use of mission by placing mission at the centre of all actions and thinking. The specific ways in which charities do this will be identified a little later. The charitable sector's use of mission is by no means a recent observation. However, although 'mission drift' (Bennett & Savani, 2011), in which the organisation defers from its set mission, and more recently, the dilution of charities mission's to allow for public service delivery (Planning Resources 2007a), has been researched, the value of having a mission to develop and deliver effective PM, has not.

At the time of writing the case of Mid-Staffordshire Primary Care Trust, and less recently, the 'Baby P' case have been widely reported on by the media. In both of these cases the roles of performance targets and indicators 'crowding out' service delivery outcomes was highlighted as a key cause of service failure. This 'crowding out' process occurs when targets become the focus, leading to services being delivered with a blinkered approach, ultimately proving a distraction from the needs of their service users:

> *'Numerous studies exist which show that a proliferation of performance targets tends to 'crowd out' other, perhaps more embedded, understandings of good performance. This has been demonstrated not only in the field of medicine, but also in teaching, policing and many other services areas. We know that organisational agents initially work hard to run two systems – the target serving system and the local conception of service. But this 'decoupling' as it is called is hard to sustain over time. Targets eventually attract attention, staff time and resources, and thereby become validated. Activities which fall outside the scope of targets become quite literally invisible and illegitimate. The Mid Staffordshire case is manifestly an*

extreme example of target pathology and a salient reminder of what many scholars have observed to a lesser degree.'

(Power, 2013:2)

As 'crowding out' has been increasingly observed across the public sector, the idea of the charitable sector's unique use of their mission becomes more pertinent. As part of the research conducted for this paper it was found that charities views toward their mission varied, but could be categorised under three broad attitudes:

1) Those who saw their mission as the core of the organisation, the driving force to delivery:

"I mean, this project was started by two catholic sisters and this area was a red-light district, so they moved into this road 26 years ago and had a little house when it was a red-light district and the nuns used to go out and chat to the girls, chat to them bring them a sandwich and cup of tea and built a relationship and it just gradually grew from there. And I think that's the difference, that isn't the sort of service that a Local Authority (LA) is going to do, they're not going to go out with cups of tea and a sandwich at one o'clock in the morning to a load of women walking the street. And that's born out of an ethos of an organisation that is caring, wants to reach the marginalised, the oppressed, desires something for those people who have fallen through the cracks. And LA's just aren't set-up to do that, I mean you get the odd outreach service that an LA provides but it's quite rare and lot of the services are very rigid aren't they? They're very much 'we sit in our office and we expect the person to come to us and if they don't turn up for the appointment, well they can't have wanted it that much anyway' and there is no real understanding of the issues that people are going through, so I think that's where the Voluntary sector have got a really different slant on life really, it's just different, just different . . ."

(SOURCE: Medium charity)

2) Those who had a broad mission, allowing them a basis to apply for funding in the difficult economic climate:

"I suppose our strap line is "tackling homelessness and alcohol misuse" because that encapsulates our two main aims . . . but we do an awful lot more than that . . . we were two charities that merged. So one charity was very focussed on Alcohol issues and the other one was more general, working with people who are homeless, socially isolated or unemployed, so putting those things together already gave us quite a wide remit, but we've developed that further in response to peoples' needs".

(SOURCE: Medium charity)

3) And finally those who had a more professional approach to delivery, where the focus was on efficient and effective processes underpinned by their mission:

"We have an overall Business Plan, and we have to meet targets and priorities within that, and we also have financial targets linked to that and we have targets and they're all linked to the Quality statistics that we want to meet. So, in our current Business Plan the priorities are; Service Development, Quality Service and User Involvement, they're are main priorities; so anything is in that joined-up approach, and we want to progress against that on a monthly basis on each of our six bases."

(SOURCE: Large charity)

An extension of this approach to mission, often found in larger charities, was where although mission was important, other processes and functions also received appropriate resources. Amongst these charities the mission alone was by no means a 'silver bullet' solution, in fact if not properly managed 'mission' could itself become justification for dissent from the organisation's strategic objectives:

"Yes, although mission is important it is not the only thing that is important, you also have to have other things in place that make the mission stick together."

(SOURCE: Large charity)

Charities' mission is also something that has received attention from wider stakeholders, with the Charity Commission advocating a strong mission as key to an effective charity; '*an effective charity is clear about its purposes, mission and values and uses them to direct all aspects of its work'* (Charity Commission, 2013p). Furthermore, across the interviews with charities the view that staff and stakeholders believed in the charities mission was central to the effective delivery of services:

"How do you quantify the ethos of an organisation and why that ethos makes it different? You could go in and look at structures at that kind of thing and replicate that somewhere else, but you can't really quantify that. So that's why anybody who comes and works for us, we ask them at their interview; do you understand the ethos of the organisation? Are you happy to abide by that? We explain that it is a faith-based organisation, but obviously you don't have to be Catholic or Christian or anything, but they have to understand the ethos and know that if you really have a problem with that then you wouldn't be able to work here."

(SOURCE: Medium charity)

The overall conclusion that can be drawn is that the way 'mission' is applied across the charitable sector varies, but if managed well, in-line- with other strategic processes, it ultimately remains a positive factor in the delivery of its services.

In spite of the range of perspectives in the use of mission, a consistently used approach in application is where Mission is used to motivate and underpin actions and decision. As a result, all actions are 'tethered' back to the core of the organisation and so generate loyalty, commitment, and good productivity across the workforce and volunteers. This 'tethering' approach is illustrated in Diagram 1.

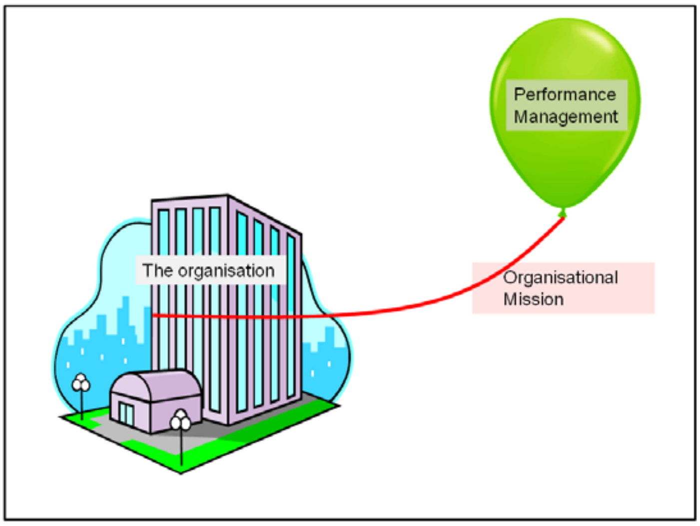


Diagram 1. 'Tethering'

From the charities interviewed and the different ways in which the organisation's mission was used to underpin PM came a few reoccurring practices employed to ensure the effective use of 'tethering', these were:

4.1 Mission & Matching when selecting staff and volunteers

Mission and Matching across the charitable sector has been previously examined as a joint concept by Besley & Ghatak (2003). Within their research Besley et al (2003) called for a change in public service delivery from the private sector approach of choice and competition. They argued that public services cannot be modelled on the private sector as this fails to provide choice or deliver services efficiently. Instead the charitable sector provides a better model:

> '*We would like to argue that these organisations* (charities) *share similar organisational design concerns relating to the structure of accountability, incentives and the extent of competition*'
>
> (Besley & Ghatak, 2003:3)

A recommended solution was '*the production of public services (which) coheres around a mission and discusses how decentralised service provision can raise productivity by matching motivated workers to their preferred missions'* (Besley & Ghatak, 2003:6).

Unlike the Public Sector, where there is a requirement to provide an array of services, in most cases the charitable sector keep their mission to a particular service area, which remains strong at the heart of the organisation. Furthermore, because they are able to communicate this strong mission to others, they are also able to attract staff and volunteers who want to share in delivering this mission.

Although it is admittedly harder for the public sector and specifically Local Authorities to adopt this single minded approach to mission, it would probably be easier for specific Government Departments to apply, where there is a common service area underpinning all activity. The benefits of 'tethering' would be to help address a commonly acknowledged difficulty of public sector PM, where lack of ownership over measures causes resentment in data collection as it is not seen to be linked to their 'day job'. This problem was discussed as part of an interview conducted with an academic specialising in PM, who said:

"An interesting phenomenon that has been researched is where you can have the same PI metrics in two organisations that is exactly the same but in one organisation they have a sense of ownership, they know why they're doing this, "this is my PI and I'm using it for . . .", and the other one is experienced as "this is the what the centre wants me to do". Now although the PI is technically identical there are actually two different PM systems, one is 'owned' and a sense of ownership of the processes and what they're for, versus alienation of the PM system. And that is the nub of the issue, that is absolutely at the centre of the debate and we know quite a bit about that; with un-owned PM systems people start of fiddle around with them and do inventive things with it and don't care and do it to get the job done, and you don't get that in owned systems where the employee thinks "actually my work which is at stake here". So there are some very interesting research questions about how people experience different PM systems and the different experience that can be had from very similar systems."

(SOURCE: Large public organisation)

If the public or charitable sector is seen to have a strong mission which then attracts staff motivated and incentivised by this mission, this then also provides a positive and open attitude in the collection of data. This practice was used by a few of the charities interviewed, one of whom said:

"I think when we introduced some of the new quality measures there was a bit of feeling of "we're too busy delivering services to deal with all this" but I think most people can see the benefit of it, it's really more about good practice in delivering on outcomes, There is always resistance when you bring in something new into an organisation and I think anything new that you bring in people will say "oh, I haven't got time to do that . . Don't want to do it . . . we're already doing it."

(SOURCE: Medium charity)

Finally, the recruitment of staff and volunteers who are motivated and driven by their desire to help deliver this greater mission will also help address the commonly occurring problem of detached and blinkered data collection. This was most recently raised in the Francis Report into the Mid-Staffordshire case, where it was suggested *'that targets and financial performance became prioritised as measures of organisational success decoupled from any outcomes or risk-based performance*' (Power, 2013:2). As a result of Mid-Staffordshire's focus on achieving targets and financial performance, the more important issue of outcomes for patients and risk-assessment became ignored which led to bad service delivery for patients. The most important actor in the provision of the Trust's services; the patients, became ignored, lost and unimportant, which led to patient deaths and neglect. Although having a workforce that was committed to the core values of the organisations might not have actively prevented these failures, having a workforce that see the broader value in their work and behave with this in mind, would proactively help avoid these failures.

4.2 Strong leadership, effective narrative

The development of organisational stories that follow and practically demonstrate the values and beliefs of the organisation is widely used across the charitable sector. This use of an effective narrative to constantly reinforce the reasoning behind the charities work and the benefits to its clients is a key part of effectively using the 'Tethering' process.

Across a range of charities interviewed, the use of staff communication via either regular staff meetings, all-staff emails, or for the larger organisation; newsletters, blogs and a regularly updated intranet, worked to keep staff committed and 'tethered' to the charities mission.

"We also had representatives in every group on every level who acted as champions of the new system and they were there to help their colleagues with any problems and difficulties that they were having. We also communicated about the system through focus groups, quality road shows, newsletters, it was talked about on our intranet and was the focus of our staff conference and that sort of thing, so we do a lot to make it an easier process, and we also produced guides at every stage so if you're mystified by it; this is what you need to do and they're already doing it a lot of the time but the guide would help to show how you evidence it. We also have a Recommendation Group, who represent and support "ordinary staff" which has really helped a lot."

(SOURCE: Medium charity)

Another important factor was a strong leader. Most, if not all of the charities interviewed had strong, committed leaders, who, quite often, had been directly affected by the problems they were seeking to address. An example of this was the case of the charity 'UserVoice'. UserVoice is a relatively small charity, who work to primarily encourage the charitable sector and others to employ ex-offenders and advocate the value of having those with direct experience of the system go on to shape and influence it for the better.

The Chief Executive of UserVoice himself is an ex-offender and most staff who work for the charity have similar histories. The value of having leadership with direct experience of the issues being addressed was also said to keep the workforce motivated and in no doubt of the mission and its' practical benefit.

4.3 Conclusion

'Tethering' has the potential to address the most common concerns to effective performance management. These concerns include the 'crowding out 'of measures and targets. This arises as a result of the blinkered focus given to targets as they become the most important focus, and the client's needs become a secondary concern. Through 'tethering' performance management to the organisation's mission, a blinkered approach to PM should never be taken. This could be practiced through recruiting staff and volunteers who believe and advocate the organisation's mission, or through continually reiterating the broader objective of the workforce's actions.

Another common PM concern that 'tethering' can help resolve is the lack of ownership over performance indicators, and those required to collect data wavering off-point, or simply creating barriers to data collection. Having the organisation's 'Mission' 'tethered' to its' PM can help the workforce pay due regard to their outcomes and service delivery functions outside of the PM framework, as the overarching values work to harness all actions to their ultimate purpose.

Tethering PM to the organisation's mission through 'Mission & Matching' and 'strong leadership & effective narrative' is an approach that was shown to work for those charities amongst the research sample, and is flexible enough to applied, with slight adjustments, from grass-roots to national charities. This approach could not only be applied more widely across the charitable sector but also across public services. The cases of service failure recently highlighted and caused by a lack of ownership could also be prevented in the future. Based on the application of this approach across the sample, the most useful application across the public sector would be within specific Government Departments, where the mission could be focussed more directly in the service area. However, as said, 'tethering' is a flexible approach and can be used across charities who deliver both a wide variety and very specialised services, which means the potential for application across the public sector could be just as broad.

5. Best Practice Two - Meaningful and appropriate data

Another reoccurring point raised by charities in discussion was the collection of data that is meaningful and appropriate. Across interviews with charities this issue arose again and again, with expectedly different perspectives. On the whole, smaller charities tended to have the view of data collection as a burdensome and sometimes confusing aspect of tendering or contract requirements:

"So they were investing around 3.6 million and they didn't think about what we're going to collect . . . they eventually gave us this Excel sheet to complete, and it was fine but it didn't really tell you anything. There's a section on the last page about Outcomes under the line PathWays, but the indicators weren't very . . . they were a bit woolly and they came out with these percentages, percentage positive improvement and they were actually absolutely meaningless, absolutely meaningless. "

(SOURCE: Small charity)

On the other hand, larger charities had a more balanced view of data collection for contract requirements: *"Different contracts operate in different ways, so generalisations cannot be made as not all contracts operate in the same way".*

(SOURCE: Large charity)

Furthermore, the value of meaningful and appropriate data away from contract requirements, as a way of providing the workforce with enough information to not only meet the PM targets but, to more broadly, sustain ownership over strategic objectives. The benefit of using data in this way was most recently seen across the public and charitable sector in the case of 'ContactPoint' database. "*ContactPoint was launched in 2009 as an online directory containing basic information on all children in England and (was) accessible to frontline professionals such as teachers and social workers*" (UK Parliament Briefing 2011:1). Launched in the wake of Lord Laming's inquiry into the murder of Victoria Climbié in 2001 the database provided a source of meaningful data for child care practitioners to go beyond their PM targets and to share information to ensure no child slips through the net:

'*(I)ntended to support better and quicker communication among practitioners across education, health, social care and youth offending in the statutory and voluntary sectors*' (UK Parliament Briefing 2011:2).

It worked to focus actions on organisations purpose; to ensure the welfare of children. Although the database was later scrapped by the Coalition Government in 2010, the value of having meaningful data available to enable staff to do their jobs remains relevant to both Westminster and child-care practitioners (UK Parliament Briefing 2011:4-6). As stated by Liberty: "*the motives behind ContactPoint were never disputed"* (The Guardian 2010a).

The most successful practices of using meaningful and appropriate information within this research are as follows:

5.1 Negotiation between the data collector and collectee

Recently, the charitable sector has been the target of the sector-wide 'Inspiring Impact' programme (a project to help charities capture the 'difference' being made through their work), which advocates the collection of meaningful and appropriate data through encouraging charities to negotiate their required indicators with their commissioner.

'Charities say that a lack of funding for impact measurement is the main barrier to making progress. They are also concerned that funders generally have different reporting requirements, which are not aligned with the charities' own needs . . . Funders can improve practice - ensuring their requirements help charities learn and improve, are proportionate and align with other funders.'

(NPC, 2012:2-3)

A further extension of this would be the engagement of staff in developing their PM measures for which they are accountable across the public and charitable sector. This practice was already undertaken by one charity, who said:

"we had representatives in every group on every level . . . We also communicated about the system through focus groups . . . We also have a 'Recommendations Group', who represent and support "ordinary staff" which has really helped a lot".

(SOURCE: Medium charity)

Through encouraging and enabling staff to be involved in the development of measures that they will eventually be tasked with collecting also adds a sense of reality, knowledge and understanding of the difficulties in practically collecting data that is relevant and appropriate:

"It's about creating the will to change the organisation, to empower people to design their own modes of self-evaluation, and then maybe you can criticise and even challenge them on that, but to say 'ok, you want to be evaluated that way, well what we'll do is . .. But actually here are a couple of more things that the organisation needs' and that is a much more sensible performance conversation than is currently happening".

(SOURCE: Large public organisation)

Although the charitable sector are still at the early stages of negotiating meaningful and appropriate indicators which are mutually beneficial, the idea itself has merit and application across government. If government agencies themselves were to have a more questioning attitude to the data they are being asked to collect, usually from central government, then the lack of ownership prevalent amongst public sector performance management practices would also be helped as staff who have been engaged in developing a measure, would have more ownership of that measure.

One final element to this point is the further potential to extend this recommendation across Government. eEnabling this negotiation between central and local agencies could also allow the collectee to define measures that are relevant to them, without being compared against generic characteristics often reported on by Government departments:

> "*This could be done in a way that the Blair Government was never able to do really. It's about loosening central control and creating autonomy over PM. You have to give up a little bit of comparability, but the comparability we currently have is false comparability anyway, it's mythical comparability. So why not get Wandsworth Borough Council to be excellent on its own terms? And that can be communicated to central government. What will happen? Someone will see a report from Wandsworth and another from Newcastle-under-Lyme and you can look across. There could be base-data that you absolutely do want, a base demographic data set that is important to make comparisons. I think that is the model for, not whole but part, of LA aims to implement and own their own accountability measures.*"

(SOURCE: Large public organisation)

With the demise of the Best Value Performance Indicators (BVPI) by the Coalition Government, Local Authorities have less data requirements and are instead advocated by Government to seek their own assessment processes. With this greater autonomy comes further reason for this recommendation to be taken forward.

5.2 Value activities

The call for 'meaningful and appropriate information' relates to ownership and engagement with the PM framework. More specifically, greater 'negotiation between the data collector and collectee' seeks to change individual behaviour and attitudes across the organisation. As exemplified through the case of 'ContactPoint' made above, improving lines of communication to develop measures which are meaningful and appropriate will also lead to measures that stakeholders have a vested interest in collecting. Building on this point further; there is a school of thought that believes to cultivate this engaged attitude requires staff to be recognised and appreciated for their good performance, making this a two-way process where staff are valued for their work and so perform to a high standard (Grote, 2006:29-44).

This recommendation proposes having value attached to activities which are not usually recognised through the PM system. If done correctly, applying value to key activities in the delivery of good quality services could be successfully applied across both government and the charitable sector. The potential benefit of this concept was explained as part of an interview conducted with an academic in PM:

"Too many professional people are doing things that have value, but the PM system doesn't recognise it. So it's about making that 'value-activities', then once you do that, you get "yes, I want to be accountable to my contribution to the field in terms of reviewing papers and generating a scientific community", not that we want targets and metrics in that space but it's a way of valuing performance. I think in every organisation there are what I would call undervalued activities that are incredibly, systemically important, and that's where you want your PM system to go, to the edges".

(SOURCE: Large public organisation)

What is being vocalised here is for organisations to identify their systematically important undervalued activities leading to increased 'accountability'. Accountability in this context means individuals being held responsible for their contribution to the organisation in way that is trusting, open and honest. Not to create a fearful or domineering environment, but instead a workplace where staff are proud of their work, and are also willing to be attributed to their contribution. Instilling 'value activities' across the organisation would lead to the workforce wanting to be held accountable, something that was explained by an interviewee who said:

"I think people want to be accountable actually, accountable for the things that they value. So if you get the 'value-proposition' right, accountability is something that people walk towards (themselves). You need an accountability system that perhaps becomes a bit more disciplinary, one that is a bit tougher in the disciplinary rating, but is for most people most of the time absolutely in-tune with what's valued and what's recognised and you need a system that deals with that. But if you've got a system where everyone is suppressed and feeling nervous about their job or are ready to be blamed for things going wrong, you don't have those flexible capabilities across the organisation. So I think that there are all sorts of different accountability styles you can have, whether it be a local supervisor having a word with someone to say well done. I think we've become a bit adversarial, the people I talk to say 'I do my job and then I go home'".

(SOURCE: Large public organisation)

In order to prevent or address this “I do my job and then go home” attitude it is important to stress that organisations need to have an awareness of those systematically important undervalued activities, which will be bespoke to them.

Across the research sample the practice of having ‘value activities’ was prevalent within most charities, big and small, who understood the importance of recognising the contribution that their staff and volunteers were making. An example of this was seen at the Citizens Advice Bureau (CAB) where the most important value activity was when CAB issues and campaigns received positive media coverage, leading to friends and family of staff and volunteers recognising the importance of their work and vocalising their appreciation and approval. This recognition of their contribution, that goes beyond the walls of the organisation, was said to be the most powerful ‘value activity’ across the organisation.

The most important, and perhaps the most difficult, element of ensuring this recommendation is correctly applied is being able to identify systematically important undervalued activities. Although this may prove a difficult distinction to make, those who were successful in this regard across the sample had a excellent understanding of the attitudes and needs of staff, and in the case of the CAB; had a matrix organisation structure, where operations were kept small and local through the use of localised ‘hubs’ (CAB 2014a). Value activities have the potential of making a real change to how and why PM exists; not to focus attention on targets and measures, but to deliver a better quality of service efficiently.

5.3 Conclusion

The overall purpose of highlighting these practices is to encourage the application of a similar approach across government and more widely across the charitable sector. Increased dialogue and negotiation around requirements for information, with a more questioning attitude being taken to whether the data is meaningful to both parties, is a healthy attitude to adopt. Secondly, the more aspirational practice of value-activities, where value is more widely attached to actions outside of the PM system, is also seen as a beneficial practice across the charitable sector. Not only do ‘value activities’ lead to increased staff motivation and encourage accountability, it ultimately leads to better performance. There is also the added potential of ‘value activities’ helping staff to be more willing to be held accountable for their actions, and so help develop a PM system that is owned by all staff.

The collection of data that is meaningful and appropriate through ‘negotiation between the data collector and collectee and ‘value activities’ is an approach that is applied across the charitable sector, with the potential to also apply it across the public sector. The case of the Government’s ‘ContactPoint’ database serves to illustrate the importance of having and sharing information, which were raised as recommendations in child abuse cases. Based on the application of this approach across the charitable sector, the most useful application across the public sector would be within specific local services, such as Local Authorities, the National Health Service (NHS), Clinical Commissioning Groups (CCG) and the Police. The use of meaningful and relevant information would be most beneficial at the point of service delivery, which is where local services exist.

'Value activities' were shown to be most successful where 'systematically important undervalued activities' had been correctly identified. Across the sample, these were correctly identified in small, localised structures. As a result, value activities could be said to be more likely to be correctly applied within small and localised public service units, such as within Councils, the NHS and CCG departments, particularly within those departments central to service quality. Application within charities would also be most successful within small and localised organisations, or within those who have a matrix organisational structure. Within these circumstances the undervalued activities would be set in collaboration with staff and monitored strategically within that department or local hub, to complement mainstream PM. The reporting of this information need not be with other PM data, but it is important for observations of these activities to be periodically monitored as an indicator to ensure staff attitudes and behaviours to service delivery keeps the client as the focus. Both of these practices would help to develop a PM system that delivers good quality services for the client as less resources would be spent on data collection, with actions outside of the PM system recognised, leading to greater buy-in to the organisation as a whole, as productivity becomes a mutually beneficial process.

6. Best Practice Three - Knowing your communities

One finding of a recent Select Committee Report into the charitable sector found that one of the commonly propagated strengths of the sector was its '*user focus*' (Select Committee report 2008). The Committees support of this view was that the charitable sector was close to its communities, whether this was due to the direct experience of the issues they sought to address, the organisational structure of including clients and volunteers, or simply because they were located within the communities they served, it all amounted to a greater knowledge of their client. This view was also held by the charities and those who worked with charities interviewed as part of this research:

> *"Grass roots organisations are the better ones, for instance you live in the community, you know the local people, they're quicker to deal with you because you know their situation."*

(SOURCE: Large private organisation)

Across the sample interviewed for this research, this strength was reiterated across all sized charities. Within the larger charities there was evidence of a rigorous two-way conversation between the clients and charity through the use of regular newsletters, updates and the encouragement of dialogue across members.

> *"We've got various levels of governance, we've got our members feeding back on lots of Boards and our membership survey, so it's all about our members feeding back to us what's important, it's that kind of thing, with people going "actually welfare is a massive thing for us" or "we're really concerned about the lack of crisis care provision in our area" and it's when you start seeing a trend in those kinds of things coming through, it then makes us as an organisation go "well, we need to make sure that we're doing something about this", so it's kind of an accountability and a finger on the pulse thing, and just a bit of a link to the front line."*

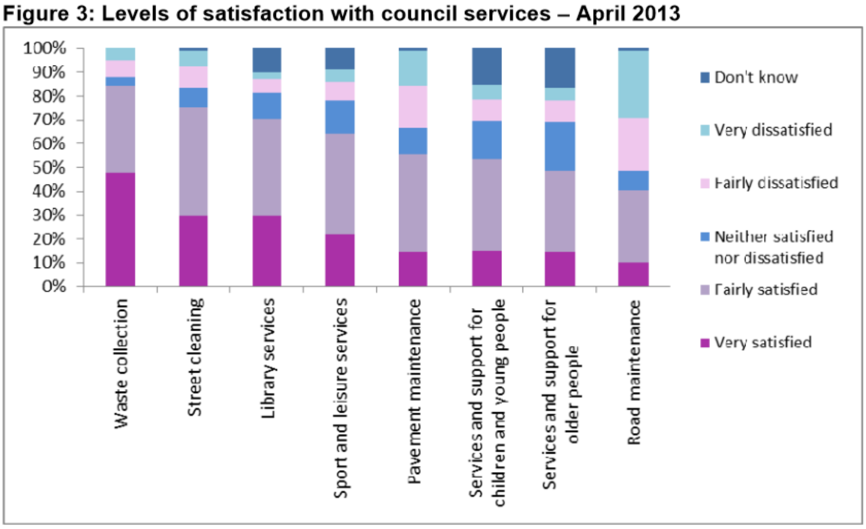
(SOURCE: Medium charity)

Within the smaller charities it was often a situation of a local person identifying a local need and seeking to address it within their own community. In the sample there was also an example of the use of Experian 'Mosaic' data, which provides a demographic profiling of clients by postcode. In this instance the potential for engagement and revenue for the charity drove the development of specific outreach and community engagement programmes to seek the patronage of marginalised clients and membership revenue.

Since the abolition of Best Value Performance Indicators (BVPI) by the Coalition Government, Local Authorities across England have faced a lesser requirement for data from Westminster. With the further demise of the Audit Commission, the department for Communities and Local Government has urged Councils to seek assessment processes privately (Gov.UK, 2010)). In response to these changes the Local Government Association (LGA) established a free ‘peer review’ assessment to Local Authorities. Some neighbouring Councils have responded by establishing their own ‘peer review’ consortiums such as London Councils (London Councils website 2013a).

In 2006 the LGA produced a report into ‘customer-led performance’, which advocated measuring client satisfaction as a mean of gauging good service delivery. From that point on, and with the changes in central data collection and no government run assessment process, the LGA have developed further publications to gauge client satisfaction across Council services as shown in the graph below.

Figure 3: Levels of satisfaction with council services – April 2013



Base: all respondents (1,036 British adults) (LGA 2013a)

The idea of basing your performance management around the needs of your clients has become a common practice across the public, private and charitable sector. However, as advocated by Besley & Ghatak (2003), there is a distinct difference between the public and private sector, with public services *‘provided for the benefit of the public at large’* (Besley & Ghatak, 2003:236). It is this very definition of public services which makes client satisfaction a poor performance measure. This is because public services are provided for the benefit of society as a whole and may not immediately ‘satisfy’ the client. This view was clearly made by a university interviewed:

> *“So I have students who may have been a bit fed-up with one of our courses, three years later they turn up to say that was fantastic, because we know that's what they needed, so the pain of the process is producing dissatisfaction but the outcome is not. We've really lost confidence around that and its led to a dumbing down across our education sector, where you go after student scores in the short-run rather than go for encouraging them to better themselves”*

(SOURCE: Large public organisation)

Conversely, most of the charities sampled did not directly focus on client satisfaction. Not least because smaller charities said to not have the resources to capture this data, with the larger charities tending to focus on service delivery above all else, with the key being a 'needs-based discourse':

6.1 Needs-based discourse

It is evident that the charitable sector does a lot in order to understand and know their communities and this is a strength of charities that is frequently cited. However, amongst the charities sampled there was little or no evidence of gathering data around client satisfaction. Instead, the focus was on client knowledge and open communication between the two to deliver services that met clients' needs. The focus of charities remained on knowing the community's needs and delivering on them, satisfaction was not often looked to inform service delivery.

"You're the one dealing with these people; you know what they want, and you know what their needs are"

(SOURCE: Small charity)

More than a focus on client needs and meeting them, it was clear that the sample of charities also cared about pursuing the clients' best interests which drove their work. This may be because charities staff and volunteers were invested in the charities mission whom clients supported and contributed to, creating a collaborative attitude, where staff and client were in a mutually beneficial relationship:

"So its sorts of things like that that make a difference, and having volunteers, people who come in and give their time freely and the women ask "why are you doing this? You're not getting paid, why do you care about me?" and that speaks volumes. One night a week we go out into the red-light district and drive around with a sister and a volunteer and some of the other outreach staff from eleven till one in the morning, they're out there chatting to the women and quite often the women will say "why do you bother, why do you care about us?" and we say "because we do, we care where you are, and that speaks volumes."'

(SOURCE: Small charity)

Client satisfaction is not an entirely useless indicator, indeed big swings in satisfaction can be indicative of a major problem. The point being made here is that the focus should always be to identify and meet the needs of the client and doing what best meets their needs over the long term. Furthermore, an over emphasis on levels of satisfaction can become a distraction within performance management.

"Customer Satisfaction is measuring something because we can't measure what's really important, it's a substitute indicator . . . So I think that there is an almost institutionalised gravitation towards these things

because you feel you have to do it and you have to show that "actually this year 87% of our customers were satisfied and last year it was 84%, so we're doing things a lot better".

(SOURCE: Large public organisation)

Putting the client's needs as the sole concern of the organisation was also a viewed expressed by the CAB who said to concentrate on the client from which "everything else" follows. This view is reflected in their corporate aims, which are:

'• To provide the advice people need for the problems they face.

• To improve the policies and practices that affect people's lives.'

(Citizens Advice 2013a: 52)

This has also been recognised at the centre of the recent Berwick review into patient safety which highlighted the importance of having a trusting, engaging and client-focussed healthcare system (Gov.UK, August 2013), and highlighting a 'problem area' of focussing on the wrong priorities:

'In some organisations, in the place of the prime directive, "the needs of the patient come first", goals of (a) hitting targets and (b) reducing costs have taken centre stage. Although other goals are also important, where the central focus on patients falters, signals to staff, both at the front line and in regulatory and supervisory bodies, can become contaminated. Listening to and responding to patients' needs then become, at best, secondary aims. Bad news becomes unwelcome and, over time, it is too often silenced. Under such conditions organisations can hit the target, but miss the point.'

(Gov.UK, August 2013:7)

This focus of 'hitting the target, but missing the point' is what is being cautioned against within this recommendation, and practices across the charitable sector show us that this can be successfully applied not only more widely across the charitable sector, but also within public services. Furthermore, the Berwick Report demonstrates that the will and realisation in the potential for this idea exists and is increasingly being embraced.

6.2 Conclusion

The value of 'knowing your communities' is perhaps the most important of all three recommendations, in that it is from instilling this culture that 'tethering' and 'meaningful & appropriate data' may follow. It is through moving our focus away from levels of client satisfaction and instead towards developing a better understanding of clients needs, that effective services may be delivered. Comprehensive knowledge and interest in the client is pivotal to the delivery of charitable services, which provides a model from which others can learn. Within the Berwick Report this respect and value for the client is advocated across the healthcare service.

Another related topic to this recommendation is the recent trend in asking the charitable sector to measure the ‘impact’, or outcomes, for their clients. Across the research sample there was a mixed reaction to the value in such work, with mainly larger charities recognising its value, and smaller charities discounting its benefit. This recommendation’s connection to ‘impact measurement’ comes in the way that ‘knowing your communities’ could be implemented. Something that was voiced by a few organisations interviewed was the risk of ‘mission’ and other cultural issues clouding effective and efficient service provision, something increasingly important within the current economic climate. Although initial evidence shows that good ‘impact measurement’ is a difficult process to implement, (TSRC 2013a) particularly for smaller organisations, with a number of charities interviewed also voicing similar concerns, it is nonetheless an important element of PM. To know the difference your work is making in the long term and then use this to shape service provision, is central to good service delivery. ‘Knowing your communities’ is also an important factor of good service delivery and is advocated as the foundation to successful ‘impact measurement’ (Inspiring Impact 2013a:8).

The application of this recommendation could apply to many public as well as charitable sector services. The level and type of public service that would most benefit would be those who provide services directly to clients, and are able to focus directly on those they seek to help. These include services such as Healthcare, Social Care, and even Education services. Through developing a better understanding of the client’s needs, these services will be able to make cultural changes in order to deliver services that are precise, well informed and have staff with a vested interest in the outcomes of their work.

7. Overall conclusion

As the evidence presented in this paper shows, the charitable sector have good practice examples of PM, which not only provide a framework for the wider charitable sector, but also the public sector. As shown in section three, the demand for better PM practices from charities is due to continue. Furthermore, with government budgets being cut, greater contracting-out and widely publicised service failures which identify PM problems at their heart; the best practice presented within this paper will prove useful across the public sector. If there is one point to be taken away from this paper it is that we can learn from the charitable sector, they have strengths which could be successfully applied across government and more widely applied across the sector itself. That is not to say that we should not also learn from the private sector, but the foundations to good PM are evident across the charitable sector and now is the time to take note and change our focus in PM to cultural Best Practice found within charities.

The best practice examples presented here focus on three key messages; 'tethering' performance management to the mission, having more meaningful and appropriate data to inform the delivery of services and focussing PM on the clients' needs. These examples of best practice in PM across the charitable sector provide the foundations to successful PM, and have the potential to help avoid frequently publicised public service failure and also provide a framework charities can directly relate to. Through implementing these best practice examples, impact measurement will also become easier to understand and apply, as outcomes can relate to the organisation's mission and output measurement can be conducted along the span of the service. Furthermore, having more meaningful and appropriate data through increased negotiation around information requirements, and the more aspirational practice of value-activities, where value is more widely attached to actions outside of the PM system, is a beneficial practice across the charitable sector, where staff willingly move towards accountability and greater ownership for their work. The final recommendation of 'knowing your communities' is perhaps the most important of all three recommendations, from which 'tethering' and 'meaningful & appropriate data' may follow. It is through moving away from levels of client satisfaction and instead towards developing a better understanding of clients needs, that effective services may be delivered. A comprehensive knowledge and interest in the client is pivotal to the delivery of charitable sector services, which serves to provide a model from which others can learn.

Finally, the simple practice of looking to the charitable sector with the potential to learn may also have the added benefit of a developing a better procurement and commissioning relationship between the public and charitable sector. As greater understanding, communication and learning is encouraged between the two, the hope is that this will lead to not only better PM practices and the delivery of good quality services, but also both sectors being better equipped to show the difference that their work is making.

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