

# A QUESTION OF PARTNERSHIP AND PERFORMANCE; CREATING A MONITORING FRAMEWORK FOR CWIC

## PART 2

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### FINDING THE RIGHT APPROACH

Organisations with comparable objectives usually collect data and monitor their respective performances in analogous ways – and such overlaps provide a basis for a joint performance framework. However, creating a successful monitoring approach for the Coventry and Warwickshire Infrastructure Consortium (CWIC) hinges less on finding commonalities than underscoring the value of partnership.

In order to gain a greater understanding of how its members perceive their partnership priorities and also to ascertain the level of CWIC's flexibility regarding its existing output-oriented monitoring, The Solution Shedd provided CWIC with two potential scenarios based on 'topical' or 'pillar' framework structures.

The topical scenario focused on the core issues that drive most members both individually and collectively under the CWIC banner, such as fundraising, training and advocacy. While the pillar approach was more of a score-card system that focused on four key areas: CWIC, Partnership, Front-Line Organisations and Finance. CWIC's management decided to proceed with the topical approach as they found it more intuitive and likely to be more viable within the project's limited timeframe. It also had the advantage of allowing members to provide data according to what is relevant for their own organisation, thereby reducing monitoring fatigue.

### THE TOPICAL SCENARIO

While CWIC's members are diverse with regards to what they focus on, they all work with frontline organisations that are facing similar constraints. In the current economic climate, third sector organisations need fundraising advice, cost-effective support services and to be shown ways to avoid 'recreating the wheel' in areas such as volunteer management and staff training. They also have to collectively find a voice to interact with the Government locally, regionally and nationally. Many of these issues are also valid for CWIC and its individual members. They need to be able to communicate what they offer to the wider third sector, to bolster their memberships, to leverage off each other in order to lower costs and to become more self-sustaining in case the next government decides to greatly lower infrastructure organisation budgets.

The Solution Shedd structured the topical monitoring framework as a dashboard to encourage ease of supervision as well as to explore each topic in a way that fits CWIC's multi-faceted needs. Specifically, each topic is looked at from the following three perspectives:

- **CWIC:** the strategic goals aimed for by CWIC to maximise its impact on the sub-region's third sector.
- **Partnership:** the value that members derive from joining CWIC and working with other infrastructure organisations.
- **Projects:** the overview of the projects developed out of the CWIC partnership in recent years and managed by CWIC members.

From both the CWIC and Partnership perspectives, the dashboard presents different objectives and performance indicators to focus efforts organisationally as an infrastructure consortium, as well as collaboratively among members. Visually, the topics line up across the top of the dashboard to be read vertically; while the perspectives of CWIC, the Partnership and Projects are portrayed horizontally across each topic – depending on the overview need.

### PART 1 RECAP

**CWIC requested a performance measurement framework to gauge its impact regionally, as well as help ascertain the value of partnership for its members. There were a few existing constraints with regards to achieving this:**

- **All 15 members are highly diverse with few similarities as to how they monitor, which is a result of an array of funders with disparate reporting requirements.**
- **CWIC is a partnership and does not own its projects – they are run and owned by its members – and so there is a lack of incentive to work together on such a framework.**
- **CWIC's members suffer from monitoring fatigue and feel the existing output-driven monitoring framework did not provide them with sufficient detail to argue their participation in CWIC or to help them with fundraising efforts.**

## THE CHALLENGES OF A NEW APPROACH

In February 2010, The Solution Shedd ran two senior management workshops and developed the draft dashboard with CWIC's management team. However, moving from its output-oriented approach proved difficult for a number of reasons.

Firstly, as CWIC's current business plan is for the period 2008 to 2011, the performance monitoring system will be brought in mid-stream. The approach therefore has to take into account an extensive past, yet also allow for a relatively short-term and unpredictable future as it is not clear what will happen post 2011. Secondly, it is imperative to ground any performance framework in CWIC's existing mission, vision and strategic goals, and not simply create a further level of complexity in terms of communicating what the consortium is trying to achieve. This proved difficult at times, as the current aims and objectives set out in CWIC's business plan are quite broad.

Thirdly, although there has been some collaborative thinking as to why organisations joined CWIC, there is no articulated partnership strategy. This made developing the partnership area of the dashboard especially difficult. The first workshop had to backbench it in lieu of concentrating on CWIC's content within the time constraints. And finally, developing such a dashboard requires clear and collective thinking and a solid chunk of time. It is common practice for senior managers to dedicate eight uninterrupted hours to map strategy, define objectives and streamline content, but such a luxury was not viable across so many organisations and so the workshops had to achieve twice as much in half the time.

## THE DASHBOARD

Thanks to all those involved, content was drafted for the dashboard and, interestingly, consensus was reached fairly easily for the topics and objectives – underscoring the dashboard structure's relevance. We aimed for SMART, outcome-oriented indicators, but in the end felt that select SMART project-oriented outputs as well as qualitative measures added more value. Ultimately the goal is about having a dashboard that suitably covers what is important to members but also fully portrays CWIC's monitoring needs and so indicators had to be tailored accordingly.

The final draft includes eight topics: training, support services, networking and marketing, advocacy and representation, quality and governance, information/knowledge and intelligence, volunteering, and finally, funds and income. Each topic generally has six potential indicators – three for CWIC and three for Partnership. While this may sound like a lot, in reality we expect many indicators to be dropped during the vetting stage and collection will be mixed between CWIC management, project teams and member organisations. For example, while searching for best practice indicators, some proposed indicators may be too ambitious for CWIC's stage of development in terms of monitoring and may have to be included at a later point if the consortium continues post 2011.

CWIC's management and members all agree that the perspective added by building the dashboard has been immensely beneficial, as it has given them the opportunity to be introspective as well as ambitious regarding the future, regardless of the funding picture. If anything, they wish these discussions had taken place three or four years ago as then the sector, Capacitybuilders and the Office of the Third Sector would have been able to access first-hand evidence about whether infrastructure consortia have made a difference to services and to frontline groups.

## GOING FORWARD

Having completed the initial drafting of the dashboard, the next step will be to collect comments from members about whether they feel the content is what it should be, if they already collect the information and, if so, then how they go about it. There will be then a final workshop with all the members collectively before delivering the draft dashboard to CWIC's management team.

Thereafter it will be up to CWIC and its members to decide how best to manage its implementation. According to CWIC Manager Jacquie Aucott: "Implementation is going to be where partnership working will be tested. Our members will have to report on information that we hope they are collecting for themselves. However, the project has already identified that we tend to collect only what is required by funders for specific projects – not overall information about our respective organisation's delivery and progress." The topical dashboard is an entirely new experience for CWIC.



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