

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

## PART 3

Written by Stefanie Shedd, Director of The Solution Shedd, in association with the National Performance Programme

### IN CONTEXT

As a consortium, each of CWIC's partners has its own respective priorities and strategic objectives. The sector can suffer from 'monitoring fatigue'. CWIC members are busy trying to keep up with their individual funders' requirements and delivering their own work, so it became evident early on that additional monitoring in this environment would not endear CWIC to its members. However, a performance framework can only gauge performance by looking at what organisations are trying to achieve and how that is being translated into actions that have impact. This 'catch-22' was compounded by a lack of incentive to partake in the process as CWIC's projects (and therefore money) are held by its members and not by the consortium.

With the draft dashboard in hand, each member was asked to feed into two separate consultations. The first consultation checked whether members agreed with the proposed content; the outcome of which was then discussed in a workshop and the dashboard further fine-tuned. The second consultation focused specifically on each member's ability to collect the desired data from April 1st 2010 and the respective internal processes involved in order to ascertain any definitional and/or consistency issues that needed to be ironed out during implementation.

### FRAMEWORK FEEDBACK

Deciding on the content of a performance framework is always challenging. There is an inherent danger that by attempting to cover all potential aspects of running an organisation, management may become over-ambitious about the type of data that should be collected. And so many indicators proposed early on are deemed unviable as the framework progresses. Additionally, there can be confusion about the 'level' at which organisations with multiple layers of hierarchy or hierarchies that are loosely defined – as is the case with CWIC – should pitch the framework.

At the end of part two of the case study, the dashboard featured approximately three indicators for CWIC's aims and three for the aims of the Partnership covering eight topics. It was predicted that the number of indicators would fall as the dashboard took shape. The feedback from the first consultation showed:

- As expected, some indicators were too ambitious. For example, CWIC wanted to monitor the cost savings of sharing services across the partnership. However, it was recognised that this would be difficult with the different finance systems and that sharing services is still very much in the development phase.
- Members agreed with the strong collaborative stance – to both gauge the value of partnership as well as focus members' efforts. As one member put it: "As a strong partnership, the emphasis must be on what we as a collective can achieve. We should be stronger as a group than we are alone and sharing expertise and resources through collaborative projects."

It became apparent during the workshop that members had vested interests with regards to the draft content. Where there were issues, it was largely because the definition was too loose or unclear. Instead of removing indicators, CWIC's members replaced or improved them – and as a result deepened their goals and set targets that will ensure consistency during implementation. Representatives from the local council and Capacitybuilders were

### PARTS 1 & 2 RECAP

**CWIC requested a performance measurement framework to gauge its impact sub-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 justify their participation in CWIC or to help them with fundraising efforts.**
- **At the end of part two a draft topical dashboard was developed that required CWIC members' feedback.**

also present at the workshop and were able – due to its user-friendly structure – to contribute outside perspectives on the framework’s apparent priorities, thereby further enriching the process.

In terms of data collection, the bulk of indicators will be collated by CWIC itself or members managing CWIC projects. Less than 30% of the dashboard focuses on non-CWIC details from members and even then, members are required only to provide feedback on indicators relevant to their operations.

## RESULTS AND CONCLUSIONS

In the end, all but three organisations fed into the dashboard content. Most members – especially the core and larger organisations – have agreed to provide CWIC with the information requested where relevant to their organisations. Some of the smaller organisations, that are struggling to survive the economic downturn and have significant resource constraints, offered to provide details on those indicators closest to their strategic aims or that require little additional data collection. We have achieved the targeted ‘two-speed’ approach, thereby successfully accounting for CWIC members’ varying sizes and painting an accurate picture of how the partnership works.

Looking back, much has been learned from this experience:

- Several iterations and consultation phases were necessary to derive a framework that best suited CWIC and its partnership. Even after the ‘final’ consultation phase, CWIC’s management made last-minute changes as some definitions did not quite achieve the required level of information or clarity.
- A framework cannot be seen as a stagnant mechanism. While we were certainly constrained by starting this process mid-way through the business plan and by the uncertainty surrounding what will happen to such consortia post-2011, it must still be viewed as an ongoing, long-term investment. The merits of indicators deemed too ambitious at the time still had a place in the discussion. Recognising the necessary evolution of a performance framework forced CWIC management to think about where they wanted the partnership to go and will help their next round of business planning, should funding be available.
- The framework and dashboard created by CWIC is also relevant to its members’ partnerships. For example, one of CWIC’s members, Warwickshire Community and Voluntary Action (WCAVA), has recently created a partnership with two other volunteer centres and a district CVS. They have shown an interest in CWIC’s performance approach as a model of how to manage their own partnership.
- While we did not have a traditional incentive per se, a element in encouraging members to participate and approve the process was the strength and leadership of some of the larger members. This may be due to the fact that they also offer the widest array of services and capacity for other members to leverage off. But even ‘unique’ members – such as the community grant provider Heart of England – actively participated, indicating that all of the members felt that their issues were being addressed.
- Finally, it must be recognised that introducing this level of performance monitoring will add to members’ work. However, the system is very selective and generally focuses on areas that partners are already monitoring or can easily be counted, and as such is relatively ‘light touch’.

“**As consortium manager it has been quite a task keeping everyone on track and meeting deadlines, but has shown that as members’ understanding of what we can achieve together has grown, so has their commitment to the work. Stefanie’s enthusiasm for the task and flexibility in adapting processes and plans to fit our circumstances has really helped the process along.**”

**Jacque Aucott, Manager, CWIC**

The result is a dashboard centered on eight topics, each of which has between one and four strategic indicators and is broken down according to the objectives set out for CWIC and the Partnership respectively. Additionally, CWIC currently ‘owns’ four projects – Interfaith, Assembly, Quality and Governance and ICT – that are run by members and each of which is also mapped under the relevant topic. For example, Assembly is mapped under the topic ‘Advocacy and Representation’. At the end of each quarter, the project manager will report a ‘smiley face’ status as well as actionable issues or successes to CWIC’s senior management. The result is a strategic and operational oversight tool that will focus each member on the consortium’s outcomes.

## NEXT STEPS

Within the timeframe it has only been possible to assist CWIC in developing its performance framework and dashboard approach. With that finalised, it will now be up to CWIC to decide upon its implementation approach.

 [www.improvingsupport.org.uk/performance](http://www.improvingsupport.org.uk/performance)  
Your gateway to third sector support, information and resources.



There will need to be further discussions on definitions and collection processes, and a wider array of staff brought into the dashboard discussion from each organisation to ensure that CWIC's performance approach is understood. To ease collection, each member should have a collection approach that fits its individual requirements. And finally, once the first quarter of 2010's data has been compiled, CWIC will need to take stock to ensure that the dashboard is being adhered to and to tweak any indicators that are missing their marks.

Historically, developing projects has not been a problematic area for CWIC. It has been the implementation phase where the partnership has struggled and this will most likely be no different with the performance framework. As CWIC's Manager, Jacquie Aucott, said: "Pulling the dashboard together has been a really useful process and has significantly engaged some members who have previously stayed on the fringes of other past activities. However, the potentially challenging part will be the production of the quarterly information. It seems to be a trait within the Voluntary and Community Sector for chief officers/execs to commit their organisation to a partnership activity, but to not then explain the context/reasons to their staff – who will have to do the work."

**“ This work has been worth doing as it has made us focus on what we are achieving as a partnership for each other, as well as our joint delivery to the frontline organisations. Much of the focus on consortia in the past has been on the latter and has neglected partnership development. ”**

**Jacquie Aucott**

# CWIC

## Coventry & Warwickshire Infrastructure Consortium



[www.improvingsupport.org.uk/performance](http://www.improvingsupport.org.uk/performance)

Your gateway to third sector support, information and resources.

