



# ***Improving your performance***

**A guide to Performance Hub resources**



performance hub

# welcome

Improving performance is critical to helping third sector organisations make more of a difference, by working more effectively and more efficiently.

The Performance Hub, one of six national Hubs of expertise, finished delivering its ambitious three-year work programme on 31st March 2008. The Hub was a partnership of leading infrastructure organisations working to improve the support available to the third sector. Work was jointly led by Charities Evaluation Services (CES) and the National Council for Voluntary Organisations (NCVO).

Over the past three years the Hub has worked to help third sector organisations achieve more, by providing information, advice and training on performance improvement.

This has included delivering 52 training courses to 499 people who support organisations to improve their performance, producing an interactive website and producing a wealth of printed information on third sector performance.

This brochure summarises all the Hub's publications from accessible 'how to' guides to research reports on 'what works' in performance and what performance support the sector needs.

These resources will continue to be available through NCVO and CES for as long as they remain relevant, leaving a lasting legacy to the third sector. We hope you will find them useful.



**Eric Appelby**  
**Performance Hub Chair**

# Contents

This guide lists the full range of publications produced by the Performance Hub, by topic. All publications are available to order from either CES or NCVO. Please check the 'How to Order' information at the end of the guide for further details.

<b><i>Introducing performance</i></b>	<b>4</b>
<b><i>Thinking ahead</i></b>	<b>6</b>
<b><i>Quality</i></b>	<b>11</b>
<b><i>Assessing progress</i></b>	<b>12</b>
<b><i>Learning from others</i></b>	<b>14</b>
<b><i>Marketing and communications</i></b>	<b>16</b>
<b><i>Managing change</i></b>	<b>17</b>
<b><i>Funding and performance</i></b>	<b>18</b>
<b><i>Resources for support providers</i></b>	<b>19</b>
<b><i>A-Z listing</i></b>	<b>21</b>
<b><i>How to order</i></b>	<b>23</b>



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**Available in  
hard copy**

# Introducing performance

Improving performance is about achieving more and making more of a difference to the people, causes and communities you care about.

Performance improvement can help organisations:

- Stay focused on their mission
- Meet or exceed aims and objectives
- Plan for the future
- Motivate staff and volunteers
- Increase engagement with stakeholders.

If you are new to performance, we have some publications providing a general introduction.



## **Achieve More**

**Quarterly magazine from the Performance Hub**

*Contributing editor: Julie Pottinger*

*Achieve More* is a free full-colour quarterly magazine for managers in the third sector. It aims to demystify performance improvement, give tips on how to get started and show you where you can find out more.

A limited number of hard copy back issues are available. Why not collect the whole set?

- Issue 1 (winter 05/06): Success with funding
- Issue 2 (spring 06): Thinking ahead
- Issue 3 (summer 06): Systems for success
- Issue 4 (autumn 06): Outcomes
- Issue 5 (spring 07): Learning from others
- Issue 6 (summer 07): Creativity
- Issue 7 (autumn 07): Marketing
- Issue 8 (winter 07/08): Planning
- Issue 9 (spring 08): Managing change

**Issues 1 and 6 are particularly good if you want an introduction to performance.**

A4 paperback, 16pp, colour

From NCVO





free

**Achieve More 1:  
Success with funding  
(winter 05/06)**

Contributing editor: Julie Pottinger

For third sector leaders and managers. Beginner level.

This issue introduces performance improvement and explores the issue of funding for performance improvement initiatives. It includes:

- Four ways to achieve more
- How to...do a user survey
- Success with funding

Dec 2005  
A4 paperback, 16pp, colour

From NCVO



free

**Achieve More 6:  
Creativity  
(summer 07)**

Contributing editor: Kate Damiral

For third sector leaders and managers. Beginner level.

Creative thinking can help third sector organisations find new ways of achieving their goals. This issue explores how fostering a creative culture within your organisation can help you achieve more. It includes:

- Beyond brainstorming
- Express your vision
- How to...deal with complaints
- Creative advice

May 2007  
A4 paperback, 16pp, colour

From NCVO



**Centre Stage?  
Making choices about  
involving users**

Jill Mulelly and Carole Sturdy

For third sector leaders and managers. Beginner/intermediate level.

Whatever the purpose of your organisation, your users are at the heart of why you exist. Involving users can generate new ideas, challenge your assumptions, and ensure your services are as relevant as possible.

This guide will help you understand the benefits and challenges of involving users. It includes guidance on how to get started with user involvement, alongside inspiring practical examples.

Mar 2008  
A4 landscape, 44pp, colour  
£12  
ISBN: 978-0-7199-1751-6

From NCVO



# Thinking ahead

Many organisations will benefit from improving their strategy – the principles and assumptions that explain how the organisation will adapt and manage itself to deliver its mission over the next three to five years. Thinking and planning ahead is fundamental to the ongoing success of your organisation, helping you make the best use of your resources to achieve your mission.

We have a wide range of resources to help you.



free

## **Achieve More 2: Thinking ahead (spring 06)**

Contributing editor: Julie Pottinger

For third sector leaders and managers. Beginner level.

This issue introduces strategic thinking and planning, explains where to get support and features the real-life experience of a community organisation undergoing a strategic review. It includes:

- Getting support with strategy
- Art of strategy
- How to...run a stakeholder workshop

Apr 2006  
A4 paperback, 16pp, colour

From NCVO



free

## **Achieve More 8: Planning (winter 07/08)**

Contributing editor: Julie Pottinger

For third sector leaders and managers. Beginner level.

Third sector organisations face great pressure to make the most of scarce resources, achieve the best for users and inspire confidence amongst supporters. This issue focuses on how to develop and implement realistic and flexible plans. It includes:

- Planning for success
- Managing risk and uncertainty
- How to...write a business plan

Nov 2007  
A4 paperback, 16pp, colour

From NCVO





## **Adventures in Strategy series**

Edited by Diana Quay

For third sector leaders and managers. Intermediate level.

This series of five think pieces addresses some of the main strategic choices facing third sector leaders and managers today. Each briefing takes a different strategic issue, exploring theory and practice to help you reconsider your own approach.

These briefings are particularly suitable for leaders and managers who have some understanding and experience of the strategic planning process and are looking for inspiration or help in making critical choices.

Dec 2007  
5 x A5, 12pp, colour  
£9.50 for the full set  
or £2.50 each  
ISBN: 978-0-7199-1747-9  
(for full set)

From NCVO



### **Adventures in Strategy 1: Renewing your strategy**

This briefing explains how to keep your strategy alive and relevant through periods of change, exploring theory and practice to help you consider your approach. It discusses dealing with growth, balancing deliberate and 'emergent' strategy, and communicating strategy effectively.

£2.50

ISBN: 978-0-7199-1742-4

### **Adventures in Strategy 2: Involving users - a sound strategy?**

This think piece discusses the benefits and risks of involving users in developing strategy, exploring theory and practice to help you consider your strategic approach. It looks at different models of user engagement, associated challenges and opportunities, and a real-life case study.

£2.50

ISBN: 978-0-7199-1743-1

### **Adventures in Strategy 3: Steering through the funding environment**

This think piece discusses how to strike a balance between delivering your mission and adapting to the funding environment. It looks at how to make the most of funding opportunities whilst avoiding 'mission drift', bringing this to life using two case studies.

£2.50

ISBN: 978-0-7199-1744-8

### **Adventures in Strategy 4: Compete or collaborate?**

This briefing considers how to decide whether to compete or collaborate with other organisations, exploring theory and practice. It explores the challenges and benefits of each approach, and ethical considerations.

£2.50

ISBN: 978-0-7199-1745-5

### **Adventures in Strategy 5: Imagining the future - using visions and scenarios**

This think piece discusses how imagined futures can help you manage uncertainty and engage people in strategy development. It looks at the benefits and challenges of scenario planning and suggests how to get the most out of it.

£2.50

ISBN: 978-0-7199-1746-2



## Future Focus series

Megan Griffith and Natalie Williams

For third sector leaders and managers. Beginner level.

Want your organisation to stay ahead of the game? You can't predict the future, but you can prepare your organisation for changes on the horizon by taking some easy steps now.

Our *Future Focus* pocket guides provide ready-made analyses of the major trends that are most likely to affect small and medium-sized organisations in the next few years.

All guides are produced by the Performance Hub and NCVO Third Sector Foresight.

5 x A6, 48pp, colour  
£1 each or £4 for set of 5  
ISBN: 978-0-7199-1758-5

From NCVO



### **Future Focus 1:**

#### **What will our funding be like in five years' time?**

This guide outlines how the funding environment may change for TSOs and suggests how you can use this information to help you make strategic choices.

May 2007, £1

ISBN: 978-0-7199-1757-8

### **Future Focus 2:**

#### **What will our volunteers be like in five years' time?**

This guide looks at how volunteers are changing – who they are, what they do and what they expect – and how this may affect you.

Aug 2007, £1

ISBN: 978-0-7199-1665-6

### **Future Focus 3:**

#### **How will we use new technologies in five years' time?**

This guide looks at how new technologies are changing the way we behave, from how we communicate to where we work.

Dec 2007, £1

ISBN: 978-0-7199-1739-4

### **Future Focus 4:**

#### **How is local democracy changing?**

This guide explores the likely changes to where power will lie locally and how decisions will be made in our communities over the next five years.

Feb 2008, £1

ISBN: 978-0-7199-1754-7

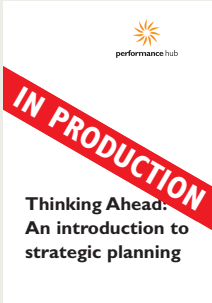
### **Future Focus 5:**

#### **How are social attitudes changing?**

This guide explores how our attitudes to personal identity are changing. It considers ideas of class, poverty, individualism, race, age, and family.

Mar 2008, £1

ISBN: 978-0-7199-1756-1



**Thinking Ahead:  
An introduction to  
strategic planning**

Jake Eliot

For third sector leaders and managers; third sector infrastructure/development workers; consultants.  
Beginner/intermediate level.

This is a clear and practical introduction to how your organisation can develop an effective strategic plan. Building on research, it explains how to get started, what's involved in a strategic planning process, and how to overcome the common challenges you might face in developing a useful strategy.

Mar 2008  
A4, 32pp, colour  
£8  
ISBN: 978-0-7199-1761-5

From NCVO



**Looking Out:  
How to make sense of  
your organisation's  
environment**

Caroline Copeman and Megan Griffith

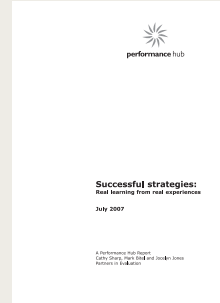
For third sector leaders and managers. All levels.

Organisations can become more successful if they spend some time improving their understanding of the changes that are taking place in their external environment.

This guide from the Performance Hub and NCVO Third Sector Foresight will help third sector leaders and managers improve their knowledge and skills in this area, to make their organisation better able to anticipate and respond to external changes.

Jul 2007  
A4, 92pp, colour  
£20  
ISBN: 978-0-7199-1723-3

From NCVO



**Successful Strategies:  
Real learning from  
real experience**

Mark Bitel, Jocelyn Jones and  
Cathy Sharp

For third sector leaders and managers; third sector infrastructure/development workers; consultants.  
Intermediate/advanced level.

This report from a Performance Hub action research project is jam-packed with practical tips and learning.

In 2006, the Performance Hub commissioned Partners in Evaluation to work with five small and medium-sized TSOs to help them develop their strategies and to generate learning about the process along the way. This report brings together the main findings of the project, including full case studies.

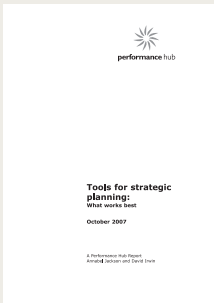
A summary of the report is also available.

Jul 2007  
A4, 58pp, black and white

From NCVO



free



### **Tools for Strategic Planning: What works best?**

*David Irwin and Annabel Jackson*

For third sector leaders and managers and infrastructure/development workers; consultants. Intermediate/advanced level.

This report presents the findings from a Performance Hub survey into what third sector organisations actually do when they carry out strategic planning.

The research, carried out by Annabel Jackson and David Irwin in 2006, found widespread enthusiasm for strategic planning across the sector.

Participants explained the benefits of and barriers to planning strategically and identified which tools they had used. SWOT, PEST and evaluations were found to be the most commonly used tools.

**Oct 2007**  
**A4, 36pp, black and white**

From NCVO



### **Advice in the Future: Scenarios and issues for the future of the advice sector**

*Megan Griffith and Natalie Williams*

For third sector leaders and managers (advice sector only). Beginner/intermediate level.

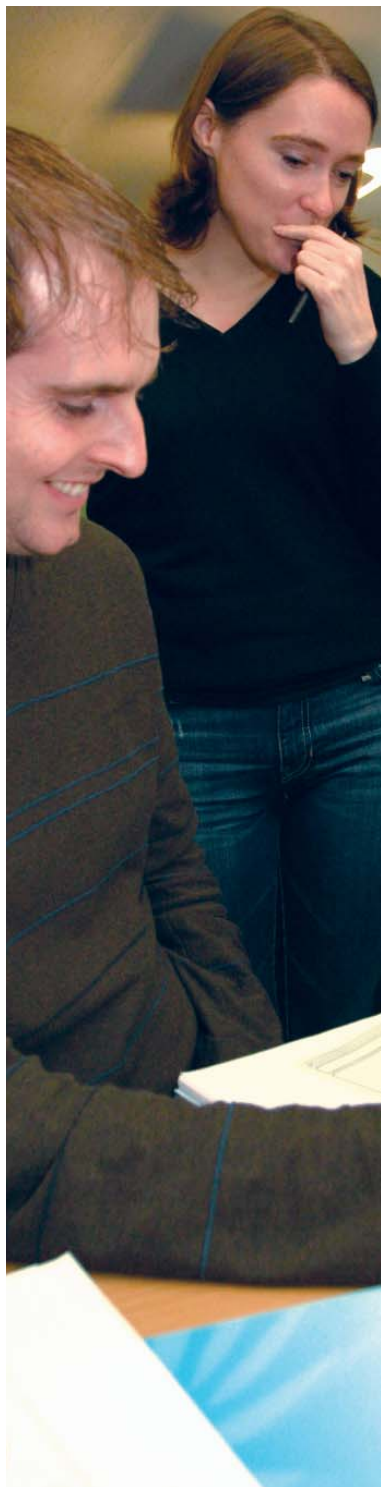
This Performance Hub and NCVO Third Sector Foresight Project report analyses how key trends affecting the voluntary and community sector will impact on the future of the advice sector.

The report, produced in collaboration with adviceuk, outlines how the operating environment for advice organisations is changing in four key areas, and some of the opportunities and challenges that may arise.

A summary report is also available.

**May 2007**  
**Full version:**  
**A4, 45pp, colour**  
**Executive summary:**  
**A4, 16pp, colour**

From NCVO





# Quality

Quality organisations are self-critical and honest, learning-focused and driven by continual improvement. They want to offer the best services they can, and to run themselves professionally.

To become and remain a quality organisation, you may need to set up some internal systems and processes. There are also a number of well-known standards and frameworks that can guide you.



free

## **Achieve More 3: Systems for success (summer 06)**

*Contributing editor: Julie Pottinger*

For third sector leaders and managers. Beginner level.

A quality standard or system can help you improve the quality of your services and how your organisation is run. In this issue we discuss what's involved and provide tips on how to get started. It includes:

- Understanding quality
- How to...choose the right standard for you
- How to...do a self assessment
- Professionalism: a dirty word?

Jul 2006  
A4 paperback, 16pp, colour

From NCVO



# Assessing progress

Most third sector organisations will, at some time, need to assess their progress by collecting information on their projects and activities and judging their performance. These processes are commonly known as monitoring and evaluation.

Assessing progress can help your organisation to learn and develop, demonstrate the difference you've made and, ultimately make more progress towards your mission.



free

## **Achieve More 4: Outcomes (autumn 06)**

Contributing editor: Julie Pottinger

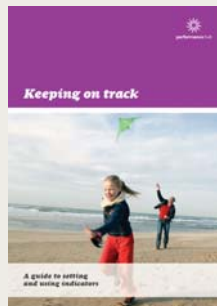
For third sector leaders and managers. Beginner level.

Outcomes enable us to define and measure our success in terms of the changes we make in society. If you're confused about what outcomes are or are simply looking for tips on how to monitor them, this issue is for you. It includes:

- Are you changing the world?
- Valuing soft outcomes
- How to...run a focus group
- Learning from our mistakes

Oct 2006  
A4 paperback, 16pp, colour

From NCVO



## **Keeping on Track: A guide to setting and using indicators**

Diana Parkinson and Avan Wadia

For third sector leaders and managers. Beginner/intermediate level.

Indicators are the signs that tell you whether the activities and changes you hoped to bring about are actually happening. Setting and using indicators is key to tracking your organisation's progress against its mission and aims.

This step-by-step guide aims to help third sector organisations improve their skills in setting output, outcome and process indicators. It also covers gathering information on these indicators and how to make use of the information you gather.

Mar 2008  
A4, 64pp, colour  
£12  
ISBN: 978-0-9555404-5-5

From CES





**Using IT to Improve your Monitoring and Evaluation**

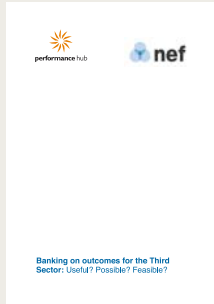
Simon Davey, Diana Parkinson and Avan Wadia

For third sector leaders and managers. Beginner/intermediate level.

Your computer systems can make a huge difference to the effectiveness of your monitoring and evaluation. This workbook covers the steps and issues you need to consider in developing appropriate computer systems that will help you monitor and evaluate your work.

Mar 2008  
A4, 80pp, colour  
£12  
ISBN: 978-0-9555404-4-8

From CES



**Banking on Outcomes for the Third Sector: Useful? Possible? Feasible?**

Lisa Sanfilippo and Tim Chambers, nef

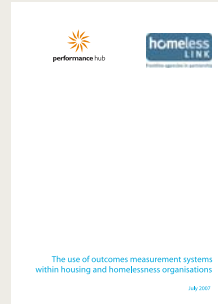
For third sector leaders and managers; funders; policy makers. Intermediate/advanced level.

Research, commissioned by the Performance Hub and conducted by nef (the new economics foundation), found that a shared outcomes indicator bank could help third sector organisations to prove their social, environmental and economic value and improve their work.

This report explores the possibility, feasibility and usefulness of a shared indicators bank to simplify the process of measuring outcomes.

Feb 2008  
A4, 46pp, two colour

From CES



**Use of Outcomes Measurement Systems within Housing and Homelessness Organisations**

Irmani Darlington and others, Homeless Link

For third sector leaders and managers; funders; policy makers. Intermediate/advanced level.

In April 2007 the Performance Hub commissioned Homeless Link to investigate the adoption of outcomes monitoring systems by third sector housing and homelessness organisations.

This research explores the lessons learned by housing and homelessness organisations adopting an outcomes approach. It considers the internal and external drivers for the adoption of an outcome monitoring approach and some of the barriers.

Jul 2007  
A4, 44pp, two colour

From CES



# Learning from others

Comparing yourself against another organisation – sometimes called benchmarking – is an excellent way to generate ideas to help your organisation improve. Peer review is where an individual of equivalent status evaluates one or more elements of your organisation.



free

## **Achieve More 5: Learning from others (spring 07)**

Contributing editor: *Julie Pottinger*

For third sector leaders and managers. Beginner level.

Looking at how other people do things and the results they achieve can help you discover new and better ways of working. This issue looks at benchmarking and covers the main steps. It includes:

- Finding the perfect match
- How to...make sense of data
- Benchmarking to grow

Feb 2007  
A4 paperback, 16pp, colour

From NCVO



free

## **Benchmarking Made Simple: A step-by-step guide**

Sue Rudkin, based on original work by *Agenda Consulting*

For third sector leaders and managers; third sector infrastructure/development workers; consultants. Beginner level.

This guide explains what benchmarking is, how it can benefit your organisation and when it is appropriate. It contains practical material to help you get started, gather information, share what you have learned with others, and use the results to improve your organisation's performance.

**Benchmarking made simple** includes learning from real-life examples and signposts to other sources of support and advice.

Mar 2008  
A4, 33pp, colour  
ISBN: 978-0-9555404-3-1

From CES





**Benchmarking in the Third Sector: A research report**

Ashley Gamble, based on original work by Agenda Consulting

For third sector leaders and managers. Intermediate level.

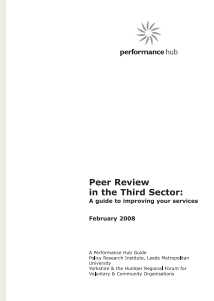
Benchmarking is a simple and valuable way of improving the performance of third sector organisations, with multiple benefits.

The Performance Hub commissioned research to find out what people thought about benchmarking, whether they had participated in benchmarking exercises, and whether they had any concerns about benchmarking as a way to improve organisational performance.

This report includes key findings and real-life case studies.

Mar 2008  
A4, 27pp, black and white

From CES



**Peer Review in the Third Sector: A guide to improving your services**

Policy Research Institute, Leeds Metropolitan University and Yorkshire & the Humber Regional Forum

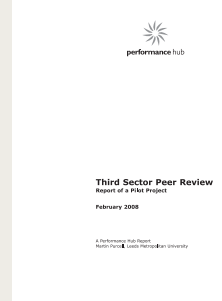
For third sector leaders and managers. Intermediate level.

This guide presents a flexible peer review model which can be applied by any third sector organisation with at least two members of staff. It also includes recommendations for how to get the most from the process.

It is based on an action research project commissioned by the Performance Hub, which piloted a specific peer review model.

Feb 2008  
A4, 22pp, black and white

From CES



**Third Sector Peer Review: Report of a pilot project**

Martin Purcell, Leeds Metropolitan University

For third sector leaders and managers. Intermediate level.

In 2006, the Performance Hub commissioned an action research project to explore the feasibility of peer review as a way to help third sector organisations improve their performance.

This report includes a review of existing literature on peer review and an outline of the pilot project, including its opportunities, challenges, conclusions and recommendations.

Feb 2008  
A4, 55pp, black and white

From CES



# Marketing and communications

Marketing means understanding and meeting the needs of users, which is central to improving your performance. In addition, your success means little if you fail to communicate it to others.

Most third sector organisations will benefit from improving their skills in marketing and communications.



free

## **Achieve More 7: Marketing (autumn 07)**

Contributing editor: Julie Pottinger

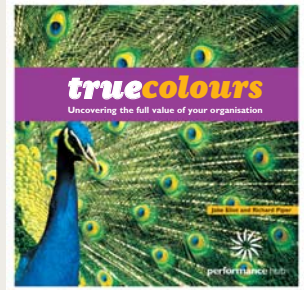
For third sector leaders and managers. Beginner level.

This issue explains why, if you really care about giving your users what they need, marketing should be at the core of your organisation's strategy and day-to-day work. It includes:

- Marketing – a mission to satisfy users
- Four marketing myths exposed
- How to target your services
- Case study: Does branding matter?
- Why not shout about success?

Aug 2007  
A4 paperback, 16pp, colour

From NCVO



## **True Colours: Uncovering the full value of your organisation**

Jake Eliot and Richard Piper

For third sector leaders and managers. All levels.

This guide will help you appreciate the broader value of your third sector organisation (TSO) and communicate it to others. It explains how telling true stories about your organisation's success can help you improve its potential to make a difference.

**True Colours** includes exercises to help you identify your 'full value' and communicate it to different audiences. It also compares the concepts of 'full value' and 'added value', and considers how TSOs can best play a role in public service delivery.

Feb 2008  
A4 square, 72pp, colour  
£12  
ISBN: 978-0-7199-1753-0

From NCVO



# Managing change

All organisations experience change. The best ones learn to take control of it where they can. These publications will help you do this.



free

## **Achieve More 9: Managing change (spring 08)**

Contributing editor: Julie Pottinger

For third sector leaders and managers. Beginner level.

This issue discusses how to successfully steer your organisation through change, introducing some key principles and a real-life case study. It includes:

- Managing change in third sector organisations
- Coping with a change in leader
- How to...make the most of external support
- Does enjoyment matter?

Mar 2008  
A4 paperback, 16pp, colour

From NCVO



## **From Here to There: Managing change in third sector organisations**

Jake Eliot and Julie Pottinger (eds)

For third sector leaders and managers. Beginner/intermediate level.

Whether they want to or not, all third sector organisations have to deal with change.

This guide is aimed at anyone who may be involved in leading change. It will help you to understand different types of change, choose the right approach and plan for a change that lasts.

*From here to there* builds on established management theory and contains direct learning from third sector leaders and managers.

Mar 2008  
A4 landscape, 36pp, colour  
£12  
ISBN: 978-0-7199-1752-3

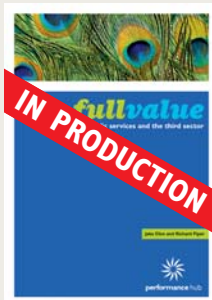
From NCVO



# Funding and performance

Third sector organisations are staffed by people who care passionately that the organisation makes a difference and meets its aims and objectives. Funders also want to make a difference by investing their money wisely.

Here are two publications that can help both funders and third sector organisations work together on performance to achieve their goals.



free

COVER DESIGN MAY VARY

## **Full Value: Public services and the third sector**

*Jake Eliot and Richard Piper*

For funders and policymakers.  
Intermediate/advanced level.

This think piece goes beyond the concept of 'added value' to a new way of recognising third sector organisations' 'full value': their outcomes – both primary and secondary, hard and soft – and the satisfaction their work brings to all their stakeholders.

It suggests how 'full value' can be used by purchasers of public services to focus contracts and commissioning processes on what matters to users.

It complements *True Colours* (page 16), a guide to help third sector organisations identify their own full value.

Mar 2008  
A4, 8pp, colour

From NCVO



## **Funding Better Performance**

*Meg Abdy, Heather Mayall*

For third sector leaders and managers; funders; policy makers  
Beginner/intermediate level.

This report examines how funders and third sector organisations can work together to achieve more.

It contains six case studies, demonstrating how working together to improve performance can help funders make their money go further, whilst enabling third sector organisations to learn and develop.

Drawing on the case studies, the report gives practical guidance to both funders and third sector organisations on the skills and approaches needed to ensure both parties get better results.

Dec 2006  
A4, 60pp, colour  
£12  
ISBN: 0-7199-1697-6

From NCVO



# Resources for support providers

If you help third sector organisations to improve their performance, we have a number of resources to help you do this.



## **Performance Improvement: A handbook for mentors**

Jean Ellis

For third sector infrastructure/development workers; consultants. Intermediate level.

This is a comprehensive introduction to helping third sector organisations improve their performance. It includes sections on strategic planning, monitoring and evaluation, quality, and benchmarking.

The guide also provides a wide range of practical tools and ideas to help development workers offer better performance support to frontline organisations.

Nov 2006  
A4 ringbound, 170pp  
£70 (inc. p&p)  
ISBN: 1-897963-27-0

From CES



## **Performance and Race Equality Project: Research report**

Asif Afridi

For third sector infrastructure/development workers; funders; policy makers. Intermediate/advanced level.

This report is based on research commissioned by the Performance Hub and delivered by b:RAP. It examines the relevance of performance improvement approaches and performance support to black and minority ethnic (BME) third sector organisations.

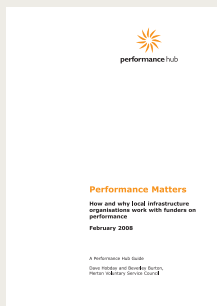
The research found that support for BME organisations should be based on an awareness of the social and political context in which they operate and needs to be promoted more effectively to them.

A 6-page executive summary is also available.

Sep 2007  
A4, 52pp, black and white

From NCVO





### ***Performance Matters: How and why local infrastructure organisations work with funders on performance***

*Beverley Burton and Dave Hobday*

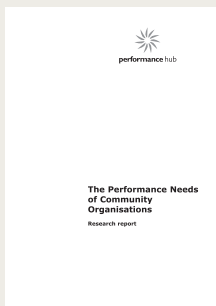
For third sector infrastructure/  
development workers.  
Beginner/intermediate level.

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It outlines why and how LIOs can play a vital role in lobbying, representing the local third sector and engaging with funders on performance issues as part of their broader role. It contains real-life examples from LIOs who've done work in this area.

**Feb 2008**  
**A4, 24pp, two colour**

From NCVO



### ***The Performance Needs of Community Organisations: Research report***

*Sarah Longlands*

For third sector infrastructure or  
development workers, consultants,  
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Intermediate level.

This report examines the main challenges community organisations face when assessing and improving their performance. Starting with a discussion of the policy context and how current trends might place new performance demands on community organisations, the report contains useful guidance to national programmes that are working to support third sector activity at a community level.

**Mar 2008**  
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