

**Live with the Performance Management Mavens!**  
**GEO 2015 Learning Conference**



**Shocking News...**



28%<sup>1</sup>

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NPOs have the capacity to engage in meaningful evaluation practice

71%<sup>2</sup>

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NPOs receive no support from funders to advance these efforts

62%<sup>2</sup>

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NPOs would like support from their funders for this work

“While the overwhelming majority of foundation leaders say they provide this kind of support, the overwhelming majority of nonprofit leaders say they aren’t receiving it.”

<sup>1</sup> State of Evaluation, Innovation Network

<sup>2</sup> Room For Improvement: Foundations Support for Non-Profit Performance Assessment, Center for Effective Philanthropy

# Setting the Record Straight....

**Performance management** is an internal form of evaluation to assess the extent to which a program is operating as it was intended, specifically, whether program activities conform to program design, are implemented consistently and are aligned with intended outcomes.





“It is important that our donor community supports/promotes strong performance management practice within non profit organizations.”



Fundraising/Resource Development  
Financial management  
Strategic planning  
Staff development  
Governance  
Information technology  
Performance management

Why do you think performance management is/isn't a priority? How does it compare to other areas of non profit strengthening/support?



Let's bring them out....





# Grantmaker sees the light





# Grantmaker targets systems change with full force





Non-profit proves exactly how  
their work is making an impact





A photograph of a person in a starting crouch on a red running track. The person is wearing bright green athletic shoes and is positioned over a white starting block. Their hands are flat on the track surface. The word "Readiness" is overlaid in large, bold, white letters across the center of the image. The track has a white starting line and a white number "5" painted on it.

**Readiness**



# How do you know if you are ready?

## Donor

**Aligned Strategy:** strategy/mission that incorporates organizational strengthening and/or demonstrating impact.

**Internal Champions:** staff with both belief and understanding in performance management

**Expertise:** Ability to broker high quality consulting resources and/or provide directly

**Vulnerability:** Willingness to learn alongside grantees and take risks

## Non-Profit

**Openness to Learn:** willingness to question/modify program

**Financial stability:** ability to cover current costs and access future resources/expertise

**Staff time:** Willingness and ability to devote staff time (program + leadership)

**Leadership:** Highly capable and engaged leadership with willingness/ability to manage change

**Vulnerability:** Willingness to be open, honest, and vulnerable with your donor



# Process

# What does it take to reach the impact?

## Donor

**Intensive and sustained funding:** provide a more *intensive level* of funding over a longer duration

**Build/coordinate expertise:** Build internal capacity and/or broker expertise

**Funder coordination:** Coordinate investments/ requirements across funders

**Holistic approach:** Focus on the full spectrum of strengthening: program design, implementation, performance management

**Continuous improvement:** Use grantee feedback to shape your approach

## Non-Profit

**Commitment:** at least 2-3 years of continuous coaching, training and organizational developments

**Key Developments:** clearly defined program model, theory of change, measurement strategy/toolkit, implementation manual

**Staff capacity:** Staff capacity and practice to collect, analyze and use data for continuous improvement

**Staff engagement:** Strong buy-in and drive from leadership and staff

**Organizational Culture:** A culture that continuously uses data for improvement



A close-up photograph of a hand holding a pencil, pointing at a grid pattern. The word "Impact" is overlaid in large, bold, white letters with a dark shadow, centered on a horizontal grey band that spans the width of the image. The background is a blurred grid, likely from a notebook or a technical drawing.

**Impact**

# What is the impact?

## Donor

**Impact:** Better outcomes and achievement of mission and ability to demonstrate outcomes

**Knowledge Generation:** Better understanding of the challenges nonprofits face

**Advocacy and Systems Change:** Greater span of influence and systemic change

## Non-Profit

**Quality:** Increased quality of programming

**Impact:** strengthened outcomes, and ultimately greater social and systems change

**Sustainability:** Increased ability to attract revenue

**Efficiency:** Targeted and better defined use of resources -financial and human



[https://www.polleverywhere.com/multiple\\_choice\\_polls/iwow9tr52VvpGP](https://www.polleverywhere.com/multiple_choice_polls/iwow9tr52VvpGP)

**“Our donor community supports/promotes strong performance management practice for non-profit organizations.”**





What are we doing to help or hinder  
NPO performance management  
practice?

1. Provide \$100K of programmatic funding to organizations
2. Provide \$80K of unrestricted funding and \$20K toward capacity building support for performance management strengthening

1. Require non-profits to align/report up to your (the donor's) key performance indicators
2. Support organizations so that they can better define and report on their own key performance indicators



1. Offer support for NPOs to participate in short-term trainings or convenings to discuss evaluation/assessment tools
2. Provide intensive capacity building support (1-3 years) to strengthen their holistic practice (program definition, implementation, and measurement, use)

1. Pay \$30K to fund a consultant to evaluate a NPO's effectiveness
2. Pay \$30K to fund an organization's participation in a performance management capacity building program

1. Be an advocate in the donor community to remove obstacles that non-profits face in terms of strong performance management
2. Be an advocate in the donor community to raise expectations in terms a greater need for non-profit accountability to outcomes





List



# Top 5 things funders to hinder the performance management practice of non-profits

5

Provide consulting resources (often that provide recommendations) without providing funding directly to the organization to support its corresponding implementation

4

Fund a new system or tool without a well-vetted process to choose the right system and for building the practice and culture of analyzing and using data

3

Not providing enough time or enough funds to evoke internal change around performance management.

2

Limited or no general operating funds, infrastructure or capacity building funds

1

Donor directed outcome metrics and/or tools, rather than using grantees key performance indicators



**THE**  
**MOMENT**  
**of**  
**TRUTH**



If you believe you have a compelling case or story to share for a future show, please let us know!

**A special thanks to our producers and special guests:**

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