

The Performer—Issue 2

Welcome to issue 2 of the Performer.

The Performer aims to keep you in touch with what is going on within the C3 partnership and alert you to future opportunities for learning.

Since the last newsletter in October, we've got our programme of learning opportunities under way with two successful performance improvement working groups and two action learning sets. We're working with new organisations, starting to work with existing organisations on a second year review and continuing to develop new and flexible ways to use the self assessment tools, PERform, Quick PERform and the away day workshop.

We've also been short listed to receive two prizes from the National Performance Hub for innovative approaches to helping frontline organisations improve performance, both for PERform and for the performance improvement working groups.

What's inside

C3 learning opportunities

Who's been improving - C3 case studies

New social impact pilot project

PI Working Group reports

Report on 'Improving Quality for Growth'

New C3 learning opportunities

New C3 resources

See www.c3partnership.org for these new resources

- How to understand your customer results
- Product and Service development tools
- Policy Checklist

Performance Improvement Working Groups

Two new working groups are scheduled for the next few months.

- **How to use key performance results strategically, February 27th, The Coach House, CDA Brave Ltd.**
- **How to measure social impact, 25th April, venue tba**

Working groups are designed to help you develop/improve systems to collect and use results to manage and improve your organisation.

A key characteristic is that they involve working with your peers over three sessions in a 3 or 4 month period. Each of these three sessions will incorporate practical training, structured activities to facilitate peer learning, and time to plan and implement improvements.

The aim is to provide a structure to help you through the steps involved in improving the way you collect and use results. This innovative approach to learning has been nominated for an award.

C3 contact details

Performance Improvement Advisers:

Stuart Griffin, Stuart@socialenterpriseworks.org 0117 9070080,
David Mackenzie, VOSCUR david@voscur.org 0117 9099949,
Katy Harkavy, katy@avoncda.coop 0117 9892536,
Rana Dildar Singh 0117 9396645, dildar@blackdeva.org.uk

Project Manager; Ted Fowler 0117 9222259 ted.fowler@bristol.gov.uk

Who's been improving? C3 Case Studies

BREAD Youth Project

BREAD Youth Project has welcomed the opportunity to pilot PERform after Mark Hubbard (Chair) and Jo Stallard (Manager) attended 'Improving Your Performance' workshop in June 2006.



Over the past 12 months BREAD has recruited a relatively new staff team, as well as new trustees. This proved to be an ideal time to review performance, encourage staff and trustees to develop their vision, and create practical ways in which the whole team can ultimately improve delivery of services to young people.

David Mackenzie facilitated an 'Away Day' in November 2006 for the staff and trustees focusing on the PERform diagnostic workbook. The day provided an opportunity for staff and trustees to get to know each other on a more personal level and have a greater understanding of each other's perceptions and needs for development. The day proved successful in terms of:

- Encouraging discussion and debate;
- Developing agreed steps for improvement; and
- Breaking down barriers between trustees and staff.

It was agreed by all participants that more 'Away Days' focusing on PERform were an essential part of BREAD's development.

Written by Jo Stallard, Manager, BREAD Youth Project

Essential Trading

Essential Trading is one of Bristol's biggest co-operatives. They have 105 staff, 80 of whom are members/directors and are located in a warehouse in Fishponds and two shops in Bath and Bristol.

Given their commitment to collective decision-making, the choice to engage in the C3 project was unanimously ratified at a monthly general meeting earlier this year. Representatives from across the co-op came together to form the Performance Improvement Team, supported by CDA advisor Katy Harkavy.

The team's first task was to create a 'bespoke quick PERform', which involved customising the standard C3 Quick PERform workbook. This Essential Trading Quick PERform has been distributed to all staff and the team is looking forward to analysing the results in the New Year.

Andy Down, Essential's PI Champion said "The framework that C3 are using is so flexible that it was a very straightforward task to make it relevant to an organisation that has such specific values and structures as Essential. Already loads of people have told me how filling in the quick workbook has helped them think about the co-op in a different way".



Dear Co-worker,

As you are aware Essential Trading are engaged in a performance improvement process otherwise known as C3. We agreed this at the October general meeting.

The expectation is that: Performance improvement ideas will be identified and an action plan for implementing those improvements will be drawn up and that the framework for a continual performance improvement process will be created.

This is an opportunity for the Co-op to use a structured approach to identifying solutions and implementing business strategies. Funding has been made available through the European Union for guidance and support with this process; this will cost Essential nothing but the time taken to participate in the project. Each sector will be able to look at how they operate and decide how they would like to improve. Please remember that this is an opportunity to pat ourselves on the back for what we are doing right but is equally an opportunity for us to look critically at the performance of Essential as a business. If you do not return this form we can assume that you are blissfully happy with the way YOUR business is run and performing and no improvement is necessary (?)

Please find attached a copy of the QUICK PERform questionnaire.

Please read the instructions overleaf and fill in the form and return to the box in the mess room by Friday 8th December.

The form should take about 30 minutes to complete (please note that this is paid time, so if you decide to complete the form at home please remember to claim the time on your timesheet.)

For more details the C3 website <http://www.c3partnership.org/> is packed full of information or alternatively if you have any questions please approach one of the C3 'Performance Improvement' team who are: Andy Down – Goods In; Georgina Milne and Ian Eastwood – resource; Lucy Allen – manufacturing; Penny Thornton – sales; Zoe Blackmore – Bath shop; Richie Ray – distribution.]

PIWG and Events Updates

How to understand the needs of your customers

The first two sessions of this performance improvement working group have now taken place. A third will take place in early spring for participants to come back together to share their learning, and lessons learnt from conducting customer research. Materials from the course can be seen on the C3 resources page. Here's what two participants said of the groups.

'A lively group of 8 people has met twice during the autumn, to work through sessions on how to improve our 'Customer Results'. We have looked at how best to discover our customers' needs and then how to capture their views and comments. We are now well armed with survey questionnaires and other tools, and will meet again in the spring to compare results. The experience has been useful not only for the learning that has come from it, but also - as always - from the networking opportunity.' Julian Williams, Chief executive, The SOFA Project

'We enjoyed and learnt from the C3 training and the other participants. We now have a market research plan and a better focus for our business's future.' Patrick Sheridan, Sit Tight Cooperative

How to understand the needs of your people

The first session took place on 10th November. The group of 6 participants from 5 organisations looked at how a performance management system (to review the performance of workers both in terms of what the organisation needs from the individual and what the individual needs from the organisation) might be developed for each specific organisation involved.

All of the participants were very happy with what they got from the day, in particular the value of sharing information and experiences with other organisations. One of the participants said the day was "an opportunity to really think about how we approach performance management, with experts and other professionals. I found it really enlightening & would really like some of my co-workers to attend something similar."

'Improving Quality for Growth' Event Report

On Social Enterprise Day 16th Nov 2006, Social Enterprise Works held a knowledge session titled 'Improving Quality for Growth'. The aim of the event, which was funded by the C3 partnership, was to provide an overview of 7 different frameworks for improving quality and performance by hearing from organisations who have implemented them. We wanted to set the C3 performance improvement approach in context.

So what were the key messages to come out of the day?

Firstly, there are a number of similarities between the models. For example, self-assessment was a common characteristic of many of the approaches, and customer or stakeholder focus was a common theme. Secondly, some of the frameworks are inter-changeable. This means that once an organisation has embedded an approach to Performance Improvement, it is relatively easy to meet a range of quality standards. For example, Project Cosmic described how their social accounting process enabled them to qualify for an Investors in People award in 6 weeks and the Matrix standard (for organisations providing Information, Advice and Guidance) in a few days. Thirdly, it was acknowledged that performance improvement and quality frameworks can seem daunting and often meet with initial resistance. However with a gradual approach (eating the elephant one bite at a time) the framework soon proved to be very useful to all involved.

If you'd like to see the presentation pack for the day, please contact Julie@socialenterpriseworks.org



C3 Learning Opportunities

Performance Improvement Working Groups

An opportunity to share and learn from your peers whilst receiving practical guidance from trainers

How to use key performance results strategically

Aim: participants will work together to identify indicators and measure the extent to which the organisation is fulfilling its mission and key objectives.

Session 1: February 27th, The Coach House, CDA BRAVE Ltd, 9.30 – 3.00pm Identifying indicators to measure outcomes against aims and objectives. Participants then return to their organisation to implement the first stages of the process.

Session 2: April (half – day session, date to be set by participants) Follow up on work on outcomes. Developing a dashboard of key performance indicators to help to use results strategically.

Session 3: May/June (date to be set by participants): Feedback and sharing of learning so far and obstacles.

How to measure social impact (SROI)

Aim: participants will learn and then implement a process for identifying outcomes and calculating social return on investment, working together as a group to maximize mutual learning throughout the process.

Session 1: April 25th, Venue tba, 9.30 – 3pm Introduction to SROI from Jeremy Nichols (New Economics Foundation), information exchange about outcomes and impacts, starting to identify indicators.

Participants then return to their organisation to implement the first stages of the process

Session 2: late May (half – day session, date to be set by participants) A closer look at indicators and information required to calculate return on investment.

Session 3: June/July (date to be set by participants): Discussions of learning so far, what has worked well when implementing improvements, and how to overcome obstacles.

Demonstrating Social Impact pilot

The C3 partnership is carrying out a pilot project over the next few months which will explore two methods of measuring social impact. The project is part funded by the Commission for Rural Communities.

Three social economy organisations involved in food related issues will be given an opportunity to demonstrate their social, economic or environmental impact using either Social Return on Investment or local multiplier 3 (LM3)

This pilot scheme is the first of its kind to be run in Bristol and we hope to come out of it with useful tools that we can test and refine so that they are appropriate to our diverse sector.

The C3 partnership will be sharing the learning about Social Return on Investment through the Performance Improvement Working Group on April 25th.

SROI offers an approach to measure the economic value of the social benefits of an organisation. It does so by translating social objectives into financial measures. It helps organisations to understand, quantify and report on the social value they create. See the C3 website resources section to link to the SROI primer for a comprehensive overview.

Local Multiplier 3 provides a simple and understandable way to measure your impact on the local economy. It gets its name from the fact that money that enters the local economy is multiplied as people spend that money again in the local economy. The method involves three stages of measurement, when income is received, spent and re-spent.