

## Writing a Performance Improvement Policy

1. If your organisation has adopted a performance improvement framework, you may find that a policy helps you to establish an implementation plan and then stick to it. You may also find that a policy serves to demonstrate your commitment to key people inside (e.g. staff, volunteers) and outside (e.g. funding/ commissioning bodies) your organisation.
2. A Performance Improvement Policy should stipulate how you intend to implement a Performance Improvement framework or system. This could be a self-assessment framework- e.g. PERform, or a system developed by the organisation itself-, or an externally validated framework, e.g. PQASSO or Investors in People.
3. The template included below is intended to provide guidance in developing a Performance Improvement Policy for your organisation. It is based on using PERform but should be easy to amend it so that it is relevant for other PI systems. This guidance is not exhaustive. Each organisation will want to develop their policy in line with their aims, objectives, organisational culture, processes and performance improvement methods.
4. This template is intended for use by a range of social economy organisations, e.g. voluntary and community sector organisations, social enterprises, cooperatives, who will have a variety of different legal structures and ways of operating. Therefore, in places, the template offers a “menu” of options which can be selected/deleted as necessary.
5. A Performance Improvement policy does not have to be long. In many ways, the shorter it is, the more accessible it can be.
6. It is important to consider how to implement this policy in order to communicate what you want to communicate and to whom. Consider displaying it in a public place, enclosing it with funding applications, adding it as an appendix to business plans, including it in staff/volunteer handbooks.
7. Notes of some of the terminology:
  - ✘ *Stakeholders*: this could include workers, volunteers, trustees, management committee members, service users, funders and others. See the C3 Information sheet on “Stakeholder Analysis” for more information.
  - ✘ *Partners*: this could include funders; organisations/people you work together with to provide a service; organisations/people providing you a service; organisations/people to whom you provide a service; your competitors and others.

## Template Performance Improvement Policy

1. This policy sets out xx organisation's commitment to implement a system for continuously improving performance using PERform, the diagnostic workbook based on the EFQM Business Excellence Model.
2. We will carry out an annual diagnosis of our organisation's position covering the 9 areas of the Excellence Model in order to produce a performance improvement action plan for each year. This plan will set out priority areas for improvement.
3. We will designate improvement teams to ensure that improvements are achieved and the action plan is met.
4. We will involve as many workers as practically possible in the diagnostic process and communicate progress through regular updates in team meetings.
5. We encourage and support a commitment towards continual improvement from all workers/volunteers/members within the organisation. Ad hoc or spontaneous suggestions for improving our products/services will be listened to.
6. We will set a timetable of seeking feedback from workers/ volunteers/ members; reviewing their contributions to improvement; listening to suggestions for our improvement as an employer.
7. We will support each worker/volunteer/ member/ etc. with resources and guidance to develop their skills to be better able to be involved with improvement plans.
8. We will ensure that our management committee/trustees/ board of directors are involved in the process.
9. We will communicate our progress regularly to stakeholders.
10. We collaborate with our partners to plan and set up ways of improving our working relationship to further develop our services/products. We will encourage input from our partners in developing our approach to improving our performance and we will encourage our partners to have their own performance improvement strategy/plan.

Date policy developed:

Date reviewed:

Disclaimer: The information provided here is intended to give some pointers, and is not fully exhaustive. The C3 Partnership cannot accept any legal responsibility for how this information is used.