


Performance management checklist

Use this check list to determine which aspects of performance management in your organisation most require attention.

 Compass Partnership	Very	Not very	Not quite	Not at all
SECTION A CLARITY OF OBJECTIVES AND PERFORMANCE MEASURES				
1. How clear are the organisation's corporate objectives and performance measures for the next three to five years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. How measurable are they?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. How clear are the objectives and performance measures of services?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. How measurable are they?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. How clear are the intended outcomes of campaigns?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SECTION B READINESS OF PEOPLE AND CULTURE				
6. How well do managers understand and work to the achievement of corporate and service objectives (ie are they integral to 'the way we do things here')?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. How comfortable are managers about collecting performance information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. How comfortable are managers about the disseminating performance information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SECTION C QUALITY OF DATA MANAGEMENT				
9. How good is the quality of the data collected about the outputs of services?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. How good is the quality of the data collected about the outcomes of services?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. How integrated is the flow of output and outcome information to senior management and board members?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. How well is performance information summarised?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION D ALIGNMENT OF REPORTING PROCESS				
13. How well developed are the processes for reporting corporate performance against objectives?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. How well developed are the processes for reporting service and campaign performance against objectives?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. How integrated are the processes for planning and performance reporting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SECTION E REPORTING PERFORMANCE				
16. How well does the organisation communicate the scale of the problems it sets out to resolve?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. How well does the organisation communicate why it has chosen its priorities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. How well are the differences the organisation has made to peoples' lives reported on its web site?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. How well aligned are statements of objectives and reports of performance in Annual Reports and Annual Reviews?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. How transparently does the annual report link achievements to income and expenditure?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. How systematically does the organisation report on achievements to major donors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. How systematically does the organisation report on achievements to contractors?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. How systematically does the organisation report on achievements to the general public?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. How well does the organisation report planned against actual activities to staff and trustees?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. How well does the organisation shout about its overall successes in all its fundraising and publicity materials, publications and other places?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>