

Shout About Success

Learning from the first year

ACEVO Conference

Dec 2005

Charities make a HUGE contribution to society

Housing

Medical research

Children and young people

Social welfare

Culture

Religion

Education

Homelessness

International aid

Environment

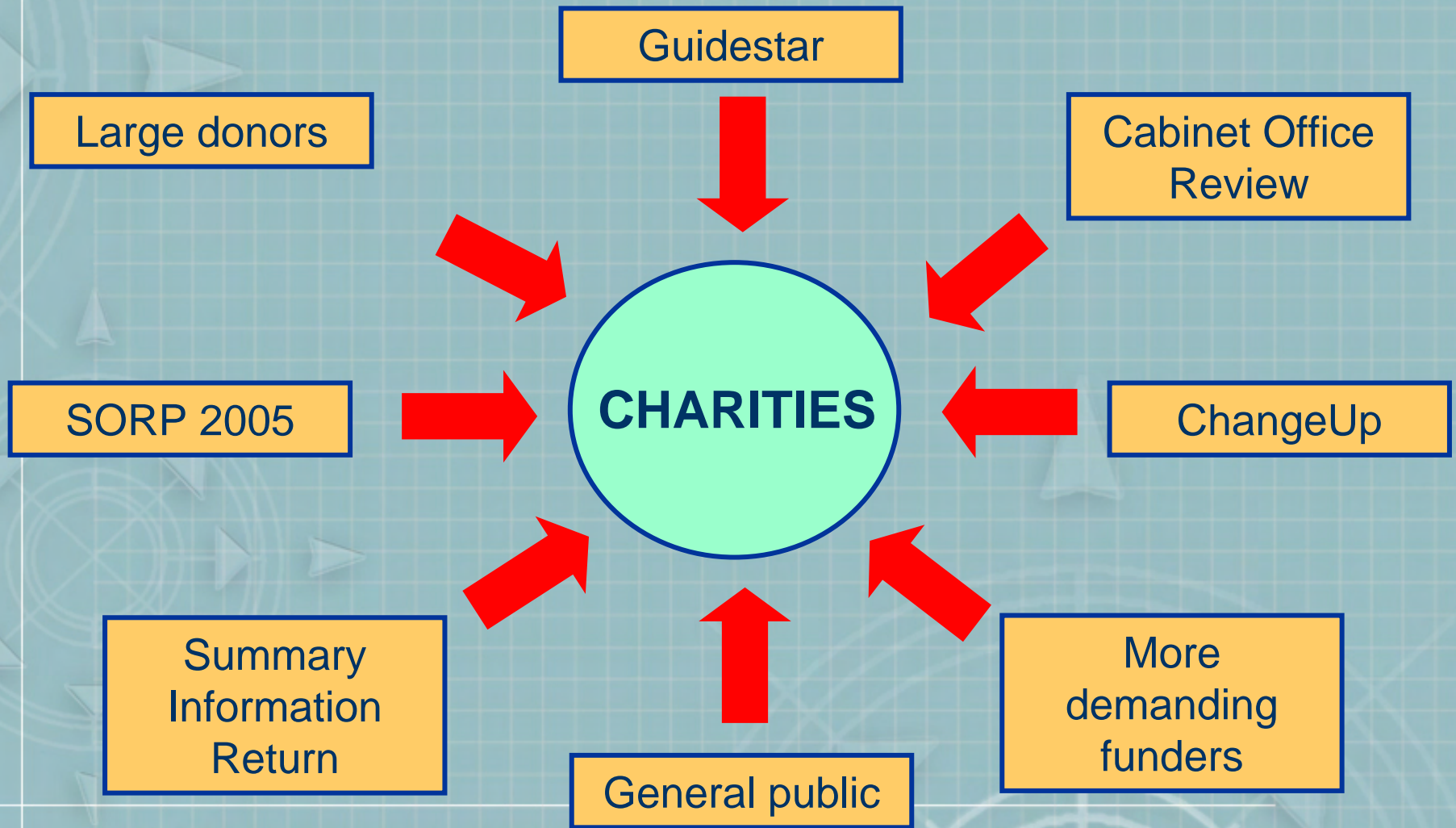
Disability

Heritage

Animal welfare



Pressure to become MUCH more transparent and accountable



BUT reporting on achievements is REALLY hard

- **Impact is hard to measure**
- **Often months or years before results are evident**
- **Quality and nature of services as important as volume delivered**
- **Measurement has to be combined with sensible judgement**
- **Often expensive to get the information**
- **Hard to ascribe achievements to one organisation**
- **Requires all parts of organisations to produce information in common formats at the same point in time.**

Objectives of Shout About Success!

- 1. To produce clear, honest and meaningful reports of charities achievements**
- 2. To align performance reporting with strategic and operational planning**
- 3. To set new standards in performance reporting for the sector**
- 4. To increase TRUST in charities**

What difference has your organisation made to your beneficiaries lives?

What have we learned 1: Content

- 1. Most 'impact' reports describe outputs not outcomes or impacts**
- 2. Having really clear objectives about what the organisation sets out to achieve helps**
- 3. The concepts of outputs, outcomes and impact provide valuable internal rigour**
- 4. Externally the generic term 'achievements' is more useful**
- 5. Clear separation of organisational achievements and 'end user' achievements is essential**
- 6. Better to report on outputs than not quantify achievements at all**
- 7. Some activities are inherently more suited to quantification**
- 8. Don't get stuck on attribution –acknowledge partners' contributions**

What have we learned 1: Content

9. Reports on achievements should demonstrate

- Who and how many people are benefiting
- The impact of services on peoples' lives
- The organisation's campaigning successes
- The achievements of research
- Results that have been achieved by working in partnership
- The funds the organisation has raised from different sources
- The way funds have been spent on different services
- The way trustees have allocated un-restricted funds

What have we learned 2: Improving processes

- 1. Important to align content and timing of planning and performance reporting**
- 2. Important to align content and timing of internal and external performance reports**
- 3. There should be considerable economies of scale in having 'core' data bases of performance information**



What have we learned 3: Reporting achievements

- 1. Different stakeholders require different performance information**
- 2. Annual Reports, Annual Reviews, web sites, intranets, SIR and Guidestar entries should promote the same 'core' achievements**
- 3. The structure of achievements reports and SORP 2005 expenditure headings should ideally be the same**
- 4. Web sites are ideal to offer 'drill down' for stakeholders who require greater detail**



What have we learned 4: Practicalities

- 1. Improvements should be linked with other activities (planning, strategic review, web redesign)**
- 2. Making improvements to web pages provides a valuable focus**
- 3. Ideally it requires one person to work on this one day a week**
- 4. Avoid getting into box-ticking and form filling that will appear bureaucratic to staff and regions**
- 5. Organisations can learn a lot from each other regardless of working in different fields**



The result.....

- **Better understanding of the organisation's achievements**
- **Better communication of achievements to board, managers, staff, branches, funders, the media and other stakeholders**
- **Greater alignment between planning and performance reports**
- **Stronger foundations for fund raising**
- **Greater motivation of everyone involved in the charity**
- **Better protection from unanticipated bad publicity**
- **Greater trust in charity**

Mike Hudson is the Director of Compass Partnership. He was the Administrative Director of Friends of the Earth during its formative years. Following this, Mike worked in the UK and USA for a business strategy consultancy. He has worked as a consultant to not-for-profit organisations for 20 years leading teams that bring about major change in complex organisations. His clients include the Chairs and Chief Executives of a wide range of national and international organisations in the voluntary, housing, education and international aid sectors and their government and foundation funders.



Mike was a Visiting Fellow at the London School of Economics from 2000 – 2003 and is currently a Visiting Fellow at Cass Business School in London.

Compass Partnership books

Managing Without Profit, Mike Hudson, (DSC, 2000) sets out the theory and practice of creating highly successful nonprofit organisations.

Managing at the Leading Edge, Mike Hudson, (DSC, 2003) describes what can be learned from the management and governance of nonprofit organisations in the USA.

Both are available from www.dsc.org.uk



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