

DELIVERING THE PROMISE OF SOCIAL OUTCOMES

The Role of the Performance Analyst

EMMA TOMKINSON | FEBRUARY 2015



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The Social Investment Lab is a nonprofit organisation that works with social entrepreneurs, investors and the public sector. We identify, implement and disseminate innovative ways of financing social innovation to tackle prominent social issues in Portugal and Portuguese-speaking countries.



Impetus-PEF is committed to transforming the lives of 11-24 year olds from disadvantaged backgrounds by ensuring they get the support they need to succeed in education, find and keep jobs, and achieve their potential. We find the most promising charities and social enterprises that work with these children and young people. We help them become highly effective organisations that transform lives; then we help them expand significantly so as to dramatically increase the number of young people they serve.

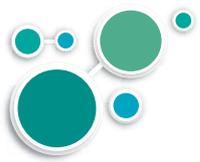


Think Impact combines rigorous social impact analysis with data visualisations and filmed stories of change. We help social purpose organisations understand the changes they create and hear the voices of their stakeholders. Our products are a precious resource for enhancing impact and a unique tool to engage supporters, funders and stakeholders.

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FORWARD

Impetus-PEF is a charity committed to transforming the lives of 11-24 year olds from disadvantaged backgrounds by ensuring they get the support they need to succeed in education, and find and keep jobs. We do this by finding the most promising charities and social enterprises working with these children and young people. Over time, and through a combination of management support, pro-bono expertise, and strategic funding, we help them become highly effective organisations that transform lives. Only then do we help them expand significantly so as to dramatically increase the number of young people they serve.

Over the last decade and a half much has been written about, and much money spent on, 'capacity-building' charities so that they may make more impact on beneficiaries. Almost without exception, this has focussed primarily on helping organisations grow in scale, reaching more people and operating in more locations. Size, or lack of it, is agreed to be what holds charities back. But what if it not just size, but also – perhaps even primarily - performance? A charity should exist to be as effective as it possibly can be in tackling its chosen social problem – and yet expertise and resource is lacking in precisely this area: the reliable production of meaningful social outcomes.

We focus on exactly this with our Driving Impact model. We look for organisations that have 'performance anxiety' – that care deeply, in other words, about the extent to which their work is having a real impact on the problems they exist to solve. We help these organisations we support to develop, operationalise, and test performance management systems which allow them to modify delivery in real time, ensuring that far more beneficiaries get to the desired outcome.



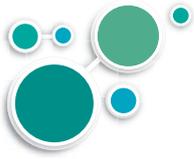
Research in this area is still nascent and so we are delighted to co-publish Emma's work as a valuable contribution to a developing body of expertise. We hope it will encourage performance analysts to recognise, discuss, and disseminate the valuable results of their work. We also hope it will inspire CEOs and boards to take seriously, and invest in, performance management. As this report shows, the work of the analyst is special, and specialised. But what the work represents is a commitment to accountability and impact which should be central to any social organisation, from the boardroom to the frontline.

[Daniela Barone Soares](#)

CEO

Impetus – The Private Equity Foundation





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There are many incredible people building performance management systems across the globe without recognition. This paper attempts to capture the experiences of a few of the pioneers in this field. Their generosity of time and ideas is greatly appreciated. Many thanks:

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- Julie Peachey [Grameen Foundation](#)
- Michael Etzel [Bridgespan](#)
- Dr. Sandy Martin
[Connecticut Center for Social Innovation](#)
- Daniel Leach-McGill [Good Beginnings](#)

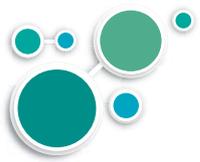
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- Tris Lumley [New Philanthropy Capital](#)
- Suzi Young [Think Impact](#)
- Katrina Cross [Triodos Bank](#)

This paper is a collection of stories and insights. It does not necessarily reflect the individual opinions of the people involved, or the official positions of the organisations and governments they represent.

Our words were diligently edited by Clare Wesley, Neil Tomkinson and Jenna Pozzi. Photographs were kindly contributed by Donna Howard, Lien Sargent and Rachel MacLennan. And final thanks go to Simon Potter, who brought it all together with his graphic design magic.





INTRODUCTION

“ *Data alone do not drive change. It is insight – the process of making sense or meaning out of information – that sparks learning and change. Who gets what information, how they get it, and how they are supported to reflect and act on it are critical.* ”¹

This paper is a selection of stories demonstrating the difference performance management systems make for social programs. It captures the attitudes and approaches of people who have figured out how to make data work for their organisations.

This performance management story is not one of brilliant technological architecture. It is a story of people and the way they work together. Performance analysts sit at the centre of performance management systems. They create feedback loops with a wide array of stakeholders, from those who deliver services on the ground to their boards of management. The role is founded on a deep understanding of the journey taken by clients, and the needs of the staff supporting them.

Performance analysts entice everyone in their organisations to make better decisions by seeking, analysing and then disseminating information. This leads to improvements across their programs and ultimately more reliable outcomes for the clients they serve.

Performance management for social outcomes has evolved over the past few decades², but the past few years have seen a growing urgency and flourishing interest from governments, service delivery organisations, philanthropists and social impact investors³. Despite the value they add, very few social purpose organisations employ performance analysts. This paper hopes to help change that.

Trends that are driving the need for performance management include outcomes-based contracting of public services, social impact investment (including social impact bonds and microfinance) and collaborative service delivery.

This research focuses on the role and perceived effect of:

- a. measuring and monitoring systems and;
- b. staff operating them.

These are respectively referred to as ‘performance management systems’ and ‘performance analysts’.

Interviews were conducted with social purpose organisations and their funders, to understand the difference performance management systems make.

The paper also includes three detailed interviews with performance analysts to paint a picture of who they are and what they do.

Finally, the components of a performance management system are described along with suggestions for resources to help with design and implementation.



WHO SHOULD READ THIS PAPER AND WHY?

- 1 **Service delivery organisations** that want to promote continuous feedback and innovation.
- 2 **Social investors/funders** who want their investments to deliver social outcomes more reliably. They may seek to invest in a performance management system and analysts that provide better information for delivery staff to cater to their clients' needs.
- 3 **Service delivery staff** who want the data they collect to be analysed and used for decision making.
- 4 **Governments** that want to understand and manage the performance of their social services, employing analysts to build their capacity in this area.
- 5 **Intermediaries** that seek to deliver more successful services or act as performance managers themselves.



KEY POINTS RAISED IN THIS RESEARCH

No stories without data - and no data without stories⁴

Shared databases make a huge difference to client groups served by multiple organisations

The system must serve the people, not vice versa

Collection of data is meaningless without understanding and analysis

Performance analysts' work aligns closer to service delivery than marketing

Common sense must prevail - there is no easy, obvious or 'right' way

Successful performance management systems are motivated by a desire for better service delivery; improved reporting and increased accountability are consequences

When talking about 'investment readiness', we must also talk about 'impact readiness'

Defining fields of data is a collaborative process that is continually refined

Performance management is essential for the reliable delivery of social outcomes

Performance management systems improve the internal accountability of an organisation

Establish governance structure that has the ability and mandate to adjust services in response to information

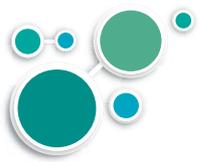
A performance management system itself is continuously evaluated and improved

Service delivery staff are the most important collaborators for performance management

Performance management systems are driven by performance analysts and their relationships

A performance management system must be rooted in the genuine pursuit of social outcomes

Some current funding, evaluation and marketing practices discourage iterative improvement



DEFINITIONS AND SCOPE



For the purpose of this paper, David Hunter's⁵ definition of performance management is used:

Performance is intentional action dedicated to reaching one or more measurable objectives. Performance can be good or bad, effective or ineffective, successful or unsuccessful, well-managed or not. Performance management, then, is a multi-step, self-correcting process...⁶

This process is also known as 'continuous evaluation', 'continuous improvement', 'performance-based management' or 'management for outcomes'. The focus of this research is performance management systems for social outcomes in particular. This paper does not seek to cover the leadership and managerial aspects of a performance management framework. Instead, it focuses on the flow of information and analysis in a performance management system, as shown in the diagram above.⁷

For this paper, terms to describe stakeholders have been chosen for consistency. It is acknowledged that these terms are not universally accepted.

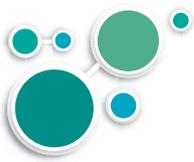
- 'client' is used where interviewees also said 'end user', 'service user', 'beneficiary'
- 'delivery staff' is used where interviewees also said 'frontline staff/worker', 'service delivery staff/worker', 'social worker' or 'caseworker'
- 'service manager' is used to describe the manager of delivery staff
- 'service delivery organisations' is used to describe organisations delivering services to clients. The word 'organisation' is used to denote both a single 'service delivery organisation' and also several working in consort.

This paper is written in Australian English. Apologies for any ensuing discomfort with unfamiliar spelling combinations.

OUT OF SCOPE

This paper does not attempt to capture all essential ingredients for good performance management systems. Specifically, it seeks to complement rather than summarise the literature on the subject, which covers:

- Leadership, strategy and culture that are essential for performance management
- How to identify outcomes and indicators, and what makes some indicators better than others
- How to design an information technology system that reflects the service model



WHY NOW?

Although performance management for social outcomes has evolved over the past few decades⁸, interest has surged in recent years. Performance management is perceived as increasingly important by governments, service delivery organisations, philanthropists, development agencies⁹ and social impact investors¹⁰.

The Capacity-Building Working Group for the UK Advisory Board to the G8 Social Impact Investing Taskforce wrote in its 2014 report,

There are two types of organisational capacity-building required by the social sector – one is around building strong resilient organisations which can grow sustainably. The other is around building organisations which can reliably and predictably produce meaningful social outcomes, eventually for large numbers of people. Both are crucial for the social investment market to flourish, but the latter has been neglected in attempts to develop the market¹¹.

The Working Group sees performance management as an essential capability for organisations whose business is producing social outcomes. They describe performance

management capabilities over four organisational stages, as seen in the table below (Table 1).

Outcomes-based contracting for public services is one trend that is driving the need for performance-management systems that work towards achieving social outcomes. In addition, the rise of social impact and collaborative service delivery has created an urgent need for performance management adoption. This is partly due to the devilish difficulty of implementing these models, which require information over and above that generated by most social purpose organisations (and governments).

Please note that the cited drivers are not the only situations where performance management systems are necessary, nor should these drivers be interpreted as recommendations.

Table 1: Performance-management capabilities appropriate to organisational stage¹²

Start-Up	Early Stage	Growth Stage	Later Stage
Operational data is collected, but individual judgment drives service delivery decisions.	Relevant datasets are identified to allow tracking of progress against outcomes. Individual client progress is routinely discussed during staff supervision.	Relevant datasets are clearly defined and routinely collected. Staff and managers review individual client progress with reference to these. Organisation can design and use feedback loops in service delivery to facilitate 'course-correction' with individual clients.	Data collection is routinely used to manage performance and improve work with clients. Feedback loops are leading/have led to tactical changes to delivery (individual client level) and strategic change (codified program level).

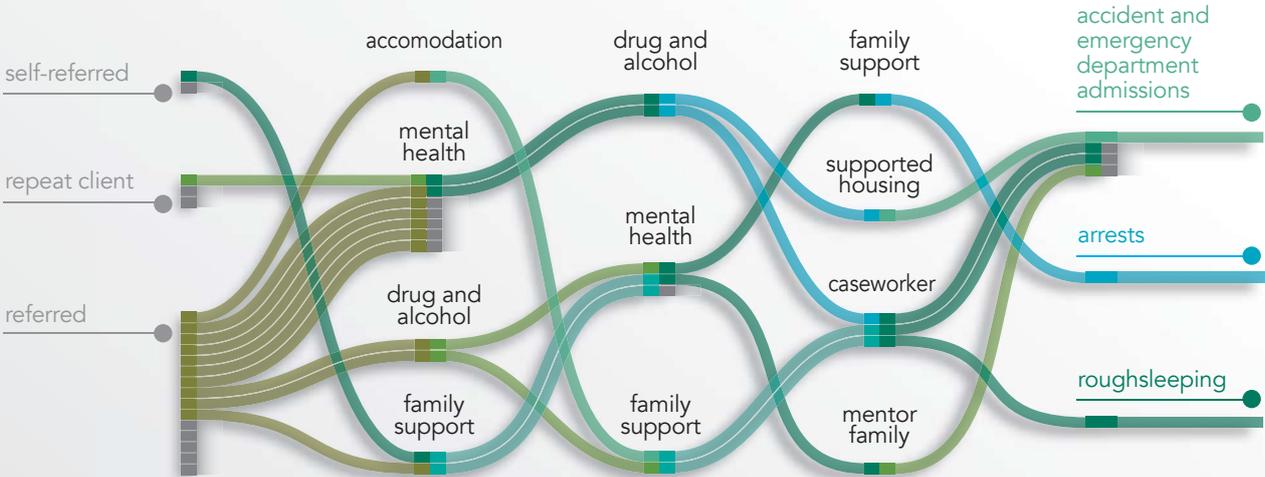
TRENDS DRIVING THE NEED FOR PERFORMANCE MANAGEMENT SYSTEMS

OUTCOMES-BASED CONTRACTING OF PUBLIC SERVICES

There are two trends associated with outcomes-based contracting that make performance management increasingly essential for social purpose organisations. The first is that publicly funded services to vulnerable or disadvantaged people are increasingly outsourced. The second is that payments for public sector contracts are increasingly based on the achievement of outcomes or results for clients (rather than more traditional cost-reimbursement models or activity-based payments). In order to participate,

social purpose organisations need to understand whether they can reliably produce the outcomes that trigger payments, how they are progressing towards them, and how to improve their service delivery as they go¹³.

Performance management processes and systems are essential for all services designed to deliver social outcomes, not only for services delivered outside government. Increasingly, government agencies are seeking to design and implement performance management systems in order to enhance the impact of their services.



The diagram above illustrates the performance analyst’s use of data from many individual client journeys to try and discover trends. Their job is to go deeper into the question of ‘does this service work?’ and ask ‘which part of this service works for whom to achieve what?’ For example, in this diagram, a good proportion of those who received mental health services early did not experience admissions to accident and emergency departments (A&E), arrests or roughsleeping, unlike the majority of those who received mental health services later in their journey. In this situation, the response of the service may be to investigate how to introduce mental health services earlier.

SOCIAL IMPACT INVESTMENT

SOCIAL IMPACT BONDS

A financing model of growing global interest and prevalence is the social impact bond. In this model, the working capital for an outcomes-based contract is provided by social investment. Performance management systems increase the ability of organisations to achieve the social outcomes specified in social impact bonds. However, the performance management function has not always been included as a feature of this model as it has been replicated around the globe, perhaps because it has not been emphasised in the literature.

Lili Elkins helps ROCA deliver a pay for success contract, which is how a social impact bond with attributable results is referred to in the US.

There are not a lot of pay-for-success contracts in the world. This means that we get a lot of calls from people asking us about the provider experience and getting the contract. Most of those people don't realize that we put together this performance management system over the past eight years and that it was so critical to the negotiation and delivery of this contract. The real challenge is to get them to understand how important using our own data is to knowing what we can deliver and being confident that we can deliver it¹⁴.

MICROFINANCE

Performance management has also been developed for the delivery of microfinance.

The Social Performance Task Force, a global working group of microfinance industry stakeholders, has created [Universal Standards for Social Performance Management \(USSPM\)](#) "as a resource to help financial institutions achieve their social goals."²⁰

The Standards are a manual of best practice and guide organisations through using social performance data for decision making. The work on the USSPM focuses on a) the intent and design of the organisation (clarity on what should be done and why) and b) the organisational systems to deliver outcomes (including human resources, staff performance management, information, quality management, risk management and governance).

The USSPM is performance management in its broadest sense, since it considers how all aspects of the organisation align with its social goals. Measuring outcomes for clients is an essential part of this system, but it is driven by management need for information about what is working, what is not, and for whom.

In addition, segmentation of target clients is a key part of the USSPM, because the starting point of creating impact through microfinance is to reach target clients, then to design and deliver services that meet their specific needs.

EXAMPLE

Peterborough Social Impact Bond

The first social impact bond was launched in 2010 by Social Finance in Peterborough, UK. Its performance management systems and processes are an important part of its operation¹⁵. Andrew Palmer, writing in *The Economist*, highlighted that a

"strength of the Peterborough scheme is how it is monitored.... Data dashboards show everything from how being met at the gates affects reoffending rates, to month-on-month comparisons of case workers' activities. Again, the structure of the social impact bond helps: it is a contractual mechanism that ensures investors, [government] commissioners and providers agree on outcomes and maintain constant communication about progress. The task for [government] is how to replicate this monitoring process on a much bigger scale¹⁶."

The Peterborough Social Impact Bond has one data system that is used by several service delivery organisations to record information on a shared group of clients. Clients attest to the benefit of only having to tell their story once, and delivery staff describe the benefit of sharing information on client progress. One of the workers delivering family support services said, "When you're thinking you don't have the answer, someone else might...as a social worker I've never had that before; I've always been on my own." The system has led to successful adjustments to the original service, such as the introduction of mental health services.¹⁸

The performance management systems developed for social impact bonds are applicable to all social programs, particularly those which are continuously evolving. As Julian Corner wrote of Peterborough in *NewStart Magazine*,

"its design overcame all of the limitations that had dogged so many previous pilots. As a result, the workers have been freed up to contend with and learn from the real challenges of the lives of short-term prisoners...They have been able to make mistakes, learn and change the service, and have had a clear incentive to do so¹⁹."

COLLABORATIVE SERVICE DELIVERY

There are several movements to encourage social purpose organisations to work together to jointly deliver social outcomes to a shared client group, in order to provide one holistic service. A shared case management IT system and data analysis are highly beneficial for achieving this aim.

One example is 'collaborative impact'²¹. It does not have a consistent definition but, generally, is used to describe the change produced by organisations working together. Another is 'collective impact'²², which is more tightly defined.

The **Foundation Strategy Group**, the consultancy driving 'collective impact', expresses the five conditions of collective impact success as:

1. **Common Agenda:** All participants have a shared vision for change including a common understanding of the problem and a joint approach to solving it through agreed upon actions
2. **Shared Measurement:** Collecting data and measuring results consistently across all participants ensures efforts remain aligned and participants hold each other accountable
3. **Mutually Reinforcing Activities:** Participant activities must be differentiated while still being coordinated through a mutually reinforcing plan of action
4. **Continuous Communication:** Consistent and open communication is needed across the many players to build trust, assure mutual objectives, and appreciate common motivation
5. **Backbone Organisation:** Creating and managing collective impact requires a separate organisation(s) with staff and a specific set of skills to serve as the backbone for the entire initiative and coordinate participating organisations and agencies²³

The first four conditions call for the type of performance-management approach described in this paper, whereas condition five shows how a performance management service from one organisation can support services delivered by a range of others.

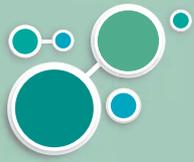
Patricia Bowie and Moira Inkelas, from the UCLA Center for Healthier Children, Families and Communities, work with the Magnolia Community Initiative "a voluntary network of 70 organisations in a five-square mile area near downtown Los Angeles." They described the way that their performance management system supports improvement,

*The Dashboard displays monthly measurements to track progress in care processes of multiple organisations and sectors. Examples include empathy and linkage. The monthly data come from surveys collected by network partners, including physicians, child care programs, and others... Unlike typical program evaluations that compare performance in two points of time, we provide regular monthly data so partners can iteratively learn and adjust their actions.*²⁴

BARRIERS TO THE DEVELOPMENT OF PERFORMANCE MANAGEMENT SYSTEMS

The scarcity of performance management systems is a consequence of barriers seriously impeding their implementation, rather than a lack of intelligence or desire to perform better. Some of these barriers are:

- Tenders and contracts that prescribe a specific service model and prohibit adjustment over time
- Donor insistence that their funds be spent in a particular way or on a specified program without allowing room to adjust
- Funders who mandate reporting of data that is not a natural by-product of an organisation pursuing its mission and seeking to improve the quality of services for clients
- Media, boards and charity rating organisations penalising charities for spending on back office functions like performance management systems as 'overheads' or 'administrative costs'
- Measurement approaches that seek to codify 'what works' at a program level and develop 'proven' programs that are static
- Failing to budget for capacity building



THE PERFORMANCE ANALYST'S PERSPECTIVE: DAN MIODOVNIK

Dan Miodovnik is an Associate at Social Finance UK, a social finance intermediary based in London. Dan developed and manages the performance management systems of three Social Impact Bonds: Peterborough, Energise Innovation Limited, and T&T Innovation Limited.

Data when used correctly can transform lives. It can provide new ways to look at service delivery, challenge perceptions of success and failure, and facilitate service adaptation and re-design. I joined the social sector to supply delivery organisations and frontline staff with analysis and tools to help them support vulnerable people.

It's not enough to say we've provided support to 60% of the people eligible for our services. We need to identify the 40% who didn't access or take advantage of the program, understand why, and have strong enough relationships with delivery staff to discuss the reasons and change the service. We celebrate the 60%, while working to ensure the remaining 40% are able to access the support they need to achieve their goals.

My role is to provide technical support. On a high level basis – it's to provide information that can be used to inform and improve service delivery. On a more granular basis, it's about identifying what are the key programmatic trends that are influencing the quality of support.

To do this, we take snapshots of clients' progression through the service to see who's achieving their goals and who's having a wobble. Using this information, we can maintain services so that the people achieving their goals continue to be supported and we can provide extra or different services to people who are not doing so well. If we combine these individual snapshots, we can begin to develop a picture of the full service. We can see how different combinations of support services produce better or worse outcomes and begin to influence program behaviour and adapt the service accordingly.

Most importantly, you must be able to analyse and synthesise and feedback on this data in a way that is appropriate to the relevant stakeholders whether that be the government commissioner, the delivery manager, the frontline staff, volunteers and service users.

The delivery staff are the experts at designing and delivering the service. Delivery staff time is best spent with clients, not entering data into a computer. My job is to make their lives easier – to give them easy access to better information as they make day-to-day decisions with clients. We try to

design our systems with this at the centre. It means we think about remote access, formats that align with client meetings etc. I'll be the first to admit that we never quite get it right, so the IT system and its processes are continuously being adjusted and improved.

The relationship between the performance analyst and delivery staff is essential. Part of performance analysis is creating feedback loops. So we create customised reports for each member of the delivery staff, another for each of their managers, for the manager of the service, for advisory board members, for investors and for other stakeholders. The reports themselves are constantly improving as we get feedback on them.

At the core, there is an overview dashboard that examines changes along key measures of operational success. Deviations from normal service delivery, both positive and negative, are flagged and further information provided that explains those changes and supports decision-making in response. This might include, for delivery staff, a list of clients whose accommodation need has not been addressed in the manner outlined in their action plan. Presenting information in this format prompts discussion and action. We want our reports to be read and understood quickly so staff can respond. The dashboard helps that happen.

On a regular basis, we also conduct customised analysis on the service. Sometimes this is conducted for managers or investors, but often it's requested by delivery staff. They might say to us "can you compare the success rate of my clients who received residential support in comparison to those who did not." We can provide this information.

But, we will often go back to them in order to get the other half of the story not always captured on the IT system. This qualitative information can be critical to understanding the service. They can tell us what questions to ask the data. We can tell them what the data is showing. But understanding why this is happening and what to do about it? That's when we need to work closely together to marry both sets of information and make changes that help us provide better support to our clients.

Because at the end of the day that's why we're all here.

WHAT DOES PERFORMANCE MANAGEMENT MEAN TO SERVICE DELIVERY ORGANISATIONS?



GOOD BEGINNINGS - AUSTRALIA

Performance management systems aren't all fun and games, particularly for those who input data, and it is important for the data to help users. Daniel Leach-McGill, from children's charity Good Beginnings in Sydney, said,

the biggest hindrance is that it eats into the time our workers want to spend with clients. When staff have been able to find a direct use of the system, they interact more with it and data quality improves. Some sites are using reports straight out of the system for clients to take to court as evidence, for example when access to their children is being reviewed. They're able to generate a report of attendance and snapshot summary of sessions over time so that the client is able to use and own it. When they can see its use, the value of the system overtakes the administrative burden²⁵.

screenshot of case management IT system



CHAIN - UK

The CHAIN database is a good example of convenient data input and use. It holds information about people who live and sleep on the streets of London. It is funded by the Mayor of London, managed by St Mungo's Broadway and is used by authorised workers from a range of organisations.

The database is continuously updated ('live') and its contents can be accessed, viewed and edited by workers as they come across people on the streets or in temporary accommodation. Using smartphones, workers can interact with the CHAIN database, add the GPS location of contacts made, log activities such as arrivals and departures from accommodation, as well as access or edit an individual's needs and barriers to permanent accommodation²⁶. The fact that workers rely on the database and use it daily provides them with an incentive to take care with the data they input.



BRIDGESPAN GROUP - USA

Michael Etzel of Bridgespan works with a range of organisations to build performance management capacity. He says that there are two major benefits for service delivery organisations,

(1) to learn about the impact and efficacy of their programming. They can't prove their impact but they can learn and make adaptations over time. (2) to better communicate that learning to their funders and outside stakeholders... Some organisations are doing this because their funders are asking for it. Others are doing it from a place of deep belief in the power of data, which forms part of the ethos and motivation of their leadership.



ST GILES TRUST - UK

Evan Jones of St Giles Trust, a service provider to the Peterborough social impact bond, spoke about the difference the performance management system has made.

We had a bit of a finger-in-the-air approach to understanding how clients engaged with us after our initial intensive work with them on release. A lot were drifting off but we didn't understand why. Through the Peterborough bond, we've been able to see really clear trends for the first time. We can see which areas of crime young people are returning to, why people stop engaging with us, how we can stay in contact in a way that's right for them, and be there for them to turn to if they are heading towards re-offending, as well as what work and training are having the most positive effect. We've been getting results with some of the most prolific locals who are known for repeat offences.²⁷



ROCA - USA

Lili Elkins from ROCA highlighted how far they have travelled on their performance management journey.

About eight years ago we started focusing on data and now we make almost every decision about the structure of our model using that data.

For example:

- we realised we were much more impactful with high risk young men and, as a result, focused our work on the highest risk young men,*
- we cut the model down to 2 years from 4 years based on the effects we were having on young people,*
- our model is 2 to 3 face to face contacts a week for young people. It turns out if we have 1 it's not as good, if we have 15 times it's not as good: 2-3 times is the sweet spot.*

Our performance-based management system really is a part of the organisational culture at this point. It's part of what everybody does, it's part of how we manage staff, it's part of our executive management team. It's used as a coaching tool: it gives us the right things to talk about. For example, once a week the full management team meets with a youth worker about a random participant. Using data, we are able to coach the youth worker and really talk about what is going well and what is going poorly for each young person and use that information to help create real change.²⁸



SOCIAL ENTERPRISE NORTH WEST - UK

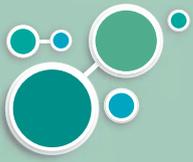
Val Jones, of Social Enterprise North West, runs a program of support to social enterprises. Her clients are organisations rather than individuals, but she uses her performance management system to make changes to the program in a similar way.

Our system allows organisations to evaluate themselves. Through a set of questions they can see where they are in relation to a benchmark, so it will show them where they need extra help. We use the information from the system to measure in total whether there's been an improvement of organisations as a whole and identify where the gaps are. In response we could put in place a different set of support, we could signpost to other expertise or specialist support. For example, in Liverpool there's a social accounting group, so we can signpost people to that sort of support or they could tap into what we've got in program.

Social Enterprise North West manages the program and uses contractors to deliver it. The performance management system is essential to communicating information between these layers. "The big thing for us is that contractors that sit between us and the frontline have enough information to signpost people to where they need to go. We see the whole picture, but they see the first result, for the individual organisation."

Val also uses her performance management system to provide information she can use in conversations with investors.

Part of what we're about is raising the profile of social enterprises and the impact on the economy and so we always try to bring an economic argument to what Social Enterprises bring to the table. Without the system I could never demonstrate what these organisations can do socially, environmentally, economically. When you have a conversation with an investor that's what they like. They always ask 'How much?' Now I can tell them²⁹.



THE PERFORMANCE ANALYST'S PERSPECTIVE: ISAAC CASTILLO

Isaac D. Castillo is the Deputy Director of the DC Promise Neighbourhood Initiative (DCPNI), a 'backbone' organisation for a collective impact project in Washington DC. The project is constrained geographically and serves around 6000 people for whom it seeks to contribute to four key outcomes: successful parents, successful kids, successful communities and healthy living.

What we ask of our partner organisations is if they want to work in the community and they want our support, they need to contribute to one of these outcomes. We offer funding and support to these organisations, as well as technical assistance which includes working with them to help build their performance management infrastructure.

The performance management capabilities of the nonprofits in the community varies widely, so our philosophy is not to dictate what software people use, but rather to have them provide data in a format (e.g. spreadsheet) that we can upload into our own data system.

Our role is to collect these data and bring them together to help tell the story across services and organisations.

To legally collect and share data, we must first obtain consent from the parents of the children, which allows us to access data from the local school system and other organisations. The challenge is getting people to understand what we're using the information for, so we take time to explain to people what we're trying to do and what we are hoping to achieve. In many instances this means that we have to describe the concept of data collection and performance management to community residents in non-technical terms.

To assist with this explanation, we often use the example of dieting. At a very basic level, if you understand the concept of dieting, you understand the concept of performance management and measurement. If you don't weigh yourself at the beginning and you don't weigh yourself at the end, you don't know what change has occurred. If you don't document your approaches and changes, you don't know what contributed to any improvements.

Most successful weight loss programs find ways to force you to take notes – they're like a giant performance management system. And we bring a similar way of thinking to the work that we do – DCPNI works with community organisations to help them document their approaches and improve their ability to collect and use data as well as to determine what is causing this change.



WHAT DOES PERFORMANCE MANAGEMENT MEAN TO INVESTORS AND FUNDERS



CONNECTICUT CENTER FOR SOCIAL INNOVATION - USA

Dr. Sandy Martin, Managing Director of the Connecticut Center for Social Innovation sees performance measurement as critical to the improvement of both government and nonprofit social service programs.

We've been focusing for too long on outputs, not outcomes. This needs to change. What we need is measurement that is real-time sensitive and that uses predictive analytics to guide future action. Many of our social service programs are locked in time; they don't look at what they're doing on a daily basis and make the changes necessary to improve outcomes²⁹.



IMPETUS-PEF -UK

Impetus-PEF is a venture philanthropy organisation that is similarly interested in performance management systems as a way to strengthen service delivery. Director of Policy and Strategy, Jenny North said,

We're implementing our Driving Impact strategy across our portfolio purely for philanthropic purposes: because we want to make services better and close the education and employment gap for young people from disadvantaged backgrounds. Embedding performance management is a key part of this.

"It helps us to both understand if our portfolio charities are on the right track and to keep investing. We look at whether the performance management systems of the organisations we invest in are improving, as well as what the systems tell us about the efficacy of their programs. It's also part of the performance management of our own Investment Directors. If the organisations they are involved with are not developing better performance management systems, they need to course correct³¹.



GRAMEEN FOUNDATION – INTERNATIONAL DEVELOPMENT

The Grameen Foundation works through partnerships with microfinance institutions, other types of social and commercial enterprises to innovate and deliver financial and information services via mobile technology. They use the [Progress out of Poverty Index \(PPI\)](#) to measure the reach of these initiatives to the poor, validate program and product design for poorer customers, and to improve the effectiveness of their own programs. Julie Peachey, Director of their Social Performance Management Center, said,

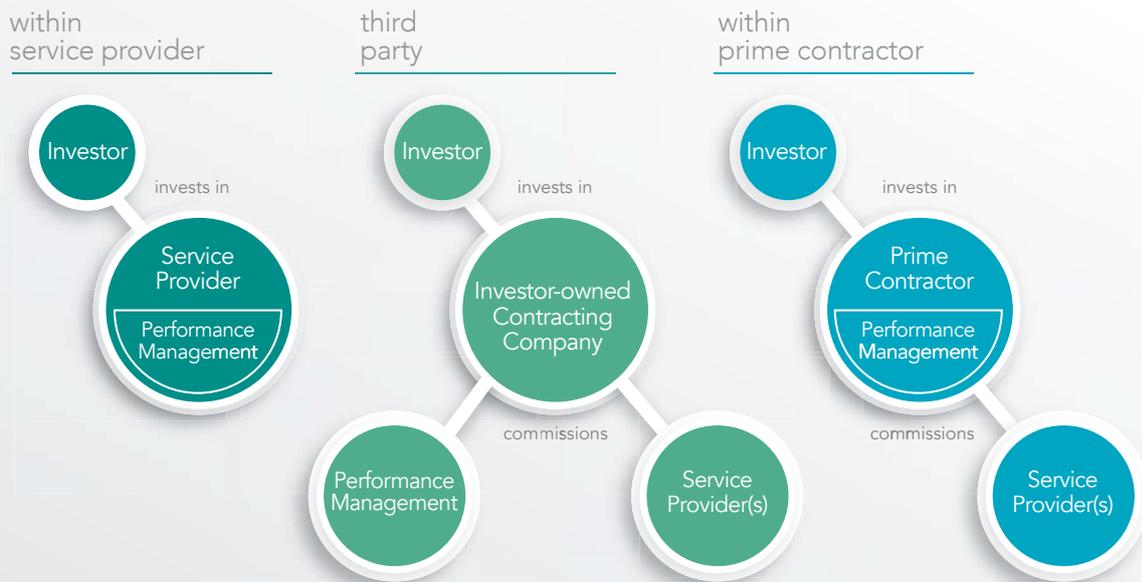
We use it at the most basic level to ensure that the products and programs we develop are reaching the intended population. The PPI is a key metric, forming part of our own organisational dashboard. We look at the poverty outreach of the programs we work on and invest in - what percent of the clients they serve are below certain poverty lines. For example, 55% of the customers of a partner or product might be below the \$2.50/day line. This is important to know especially if you expected you would be reaching more of these poor customers. We're doing what we call 'poverty outreach reports' across multiple microfinance institutions in a country or region. We've done them in the Philippines and India and are working on more comprehensive ones in Latin America and India. These are valuable for benchmarking poverty outreach and we can ask why one microfinance institution might be achieving greater outreach to the poor than another³².



BRIDGES VENTURES - UK

Performance management is a prerequisite for all programs Bridges Ventures invests in, but how it is structured depends on the needs of the service and the organisation(s) delivering it. "It's important to stress it's not about reporting to investors... it's about improving the performance of the program and improving the impact of the program", said Andrew Levitt, Investment Director, Social Impact Bonds.

Bridges Ventures' investments include three types of performance management systems:



Historically, donor and commissioner practices have not encouraged the discovery of things that can be done better. Donors want to give to services that 'work', whilst government commissioners want services delivered as stipulated in the contract. Sometimes this produces the unintended consequence of discouraging ongoing service improvement.

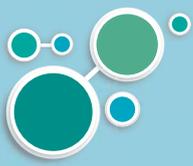
Andrew Levitt, drawing on the experiences of Bridges Ventures, explained how flexibility is necessary for improvement,

There's no such thing as a 'proven' intervention – every intervention can always be improved, or conversely can fail if it's not implemented well. When performance analysts start work on the programs that we've backed, the fog starts to lift. You always find some things that are not going well, but that is always good news, because now you understand what's going on and can do something about it.

Funders need to embrace the findings of performance management. They will be continually finding things that aren't working. Rather than seeing this as failure, they need to see opportunity for continuous improvement, learning and change.

Currently, many organisations in the charitable sector are not allowed by their donors or commissioners to adjust their services as they go. This could ultimately create a culture of secrecy and suppression of bad news, if organisations internalise the message that funders only want to hear about success.

The value of performance management systems is maximised when it is accompanied by a governance structure which is incentivised to embrace all possibilities for improvement; where funders are proud of organisations that constantly find things that are not working, and then change them for the better³³.



CASE STUDY

ESSEX SOCIAL IMPACT BOND

Action for Children delivers Multi-systemic Therapy (MST) to adolescents and their families through a social impact bond with Essex County Council. Andrew Levitt, of Bridges Ventures, describes the three biggest contributions of the performance management system as they try to maximise the impact of the program:

- 1** Getting referrals of the right sort of children from Essex County Council. We discovered that Essex weren't referring enough children who would most benefit from the intervention, due to a combination of things, including competing priorities of senior staff and referral staff not knowing the program existed, or who and how to refer. Solving this problem would not usually fall in the remit of a service provider, but our performance managers went into the council to do a marketing push and went right up to a senior level to change the way they were referring. The board is also considering whether to add an additional "marketing" function to the service, to ensure that the barriers to referral are continually being addressed proactively.
- 2** Managing the performance of the therapists in the team. The performance management function oversees a set of KPI's that tracks the quality of therapists' work with families. The performance manager uses these data to ensure that service quality is maintained at all times and to problem solve any barriers to this.
- 3** Addressing operational stretch. The first year of the program threw up some challenges where the therapist teams were over-stretched due to a combination of staff turnover, overlapping periods of annual leave and unexpected extended sick leave. We used the performance management function to track therapist utilisation to understand the extent of the problem. We took a two pronged approach in response: first, to look at performance rewards and retention incentives to attract and retain quality staff; and, second, to add additional capacity to mitigate the impact of further staff turnover within the teams. We are trying this out to see if it makes for a steadier service, despite it being an unusual step for MST teams.

We can say in these three areas with 100% certainty that the performance management has delivered. It's not just about data. It's about taking action to get better outcomes for beneficiaries, but you can't force people to take action unless you have good data.





THE PERFORMANCE ANALYST'S PERSPECTIVE: ANTONIO MIGUEL

Antonio Miguel is Director of the Laboratório de Investimento Social in Lisbon, Portugal.

The functioning of the performance management system relies on dedicated performance analysts. Somebody needs to be responsible for the continuous analysis of data as they are fed through the system.

Performance management takes time. It takes time to show delivery staff how to input data. It takes time for them to tell you how the software is frustrating them. It takes time to sit down with them for two hours and help them with the system.

While the processes of the performance management system may be replicable, every service delivery model is different and its components need to be fully understood by the analyst. First you need to understand how the service delivery model works. If you don't understand that, forget it, you cannot manage it and help it perform. You need to look at the service from start to end, and once you understand this, you map the client journey, break it down into smaller parts, and then each of these parts will have indicators that need to be tracked. For example, in a job support program, how many individuals have an individual action plan with short term and long-term goals; how many are adjusted over time to reflect their individual needs?

Once you are familiar and comfortable with the service delivery model you transpose it to a system. So you need to have soft skills to understand how the model works, but also analytical skills to determine how information should be collected, uploaded, stored, downloaded and then used; to transform the information into knowledge.

You can be reactive or proactive. You provide feedback and reporting in a timely and regular manner. But even if you have a great system, if you are interested in the change in people you produce, you will always do extra analysis. There will always be one more thing you can investigate and you will never feel you've done enough. It's one thing to report, another to interpret.

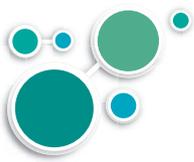
It's important to ask, "Why was performance lower this month? Is it because client intake increased dramatically or social workers didn't have time to attend to their client's need for another reason?" You spend a lot of time understanding what doesn't work. Sometimes we would spend hours and hours talking to different people who are involved in the intervention, searching for what might be behind a change in the data.

Then once you find something in the data, when do you feel confident that the data you're collecting are robust enough to change the service delivery model? It's a collaborative process where you make decisions based on quantitative information in the system but also qualitative information gathered from delivery staff and clients.

Analysis of data will suggest changes to the service at all levels. For example, an analysis of the times that missed appointments were scheduled might suggest that some days of the week are worse than others. When adjusting the service, you should always assume that people are reluctant to change, particularly people on the ground, so you need to bring them along. You need to show them the benefits of the change, whether it be better access to information, responding to client need, less time inputting data.

It is a great feeling to see improvements in the service that beneficiaries receive, ultimately improving their quality of life and outcomes. This is continuous learning for social change.





WHAT DOES IT LOOK LIKE?

Let's return to our original diagram of a performance management system and take a closer look at each component.



- 1** Consent forms let clients know how their data will be collected, stored and used. Clients can also give consent for data to be shared by service delivery organisations working together. Research from the Royal Statistical Society in the UK suggests it is more likely that clients will prefer their information to be shared between services than not shared.³⁴
- 2** The case management system should be built to mirror the service delivery model, not the other way around. At this stage, working collaboratively to decide what data to collect is crucial to the success of the system. The system should include fields of data (e.g. the date a training course began) that help the caseworker to deliver the service and fields that indicate progress. These should overlap as much as possible. For services with multiple providers, a shared case management system allows for richer data and facilitates collaborative service delivery.
- 3** Recording data can be time-consuming and boring. The process is facilitated by making it more convenient. This may involve remote access, voice recording or smartphone apps. Performance management systems should be responsive to the people using them. Delivery staff should be encouraged to request further evidence and analysis as they need it.
- 4** As well as technical skills, the analyst needs to understand the perspectives of each of their audiences, and be able to communicate in language that is appropriate for them. Their role is not only to report information, it is to interpret that information for each audience. The performance analyst must be, to some extent, a data salesperson.
- 5** Data should be fed back to all stakeholders in a timely and regular manner. The most important audience is those who input data, because if they value the information they get back, they will input more and better quality data. Reports should contain information relevant for the decisions each audience needs to make.
- 6** Adjusting a service delivery model is a collaborative process. All stakeholders of the service, including clients if relevant, should be involved in reviewing evidence, and then implementing and testing each adjustment.

IMPLEMENTING PERFORMANCE MANAGEMENT SYSTEMS

A performance management system provides information that aids understanding of current service performance. However, the environment in which it is implemented is key to its success. Jenny North from Impetus-PEF said,

What should keep you awake at night is not knowing. It's not knowing what's happening on the ground, it's not knowing what levers you can push to change. Performance management is control, but not in a control-freaky way – it's having control of your program to know how you can do it better. It's knowledge. It's visibility. It's being able to sleep at night.³⁵

This necessary ingredient of what Impetus-PEF refers to as 'performance anxiety' was further explained by one of their performance analysts, Pedro Sampaio,

It starts from the moment we begin screening new organisations to support. It's very important that the leadership shows performance anxiety; that they never stop worrying about how well the organisation is doing. It's about a culture of relentlessly pursuing better outcomes for clients. We believe we can support these organisations in implementing a performance management system and a culture of managing to outcomes, but the willingness and commitment from the leadership is absolutely critical in this process.



RESOURCES FOR IMPLEMENTATION

A complete list of resources and other useful information may be found at: deliveringthepromise.org/resources/

This paper does not claim to guide people through setting up a performance management system. For that, there are a wealth of excellent resources available.

The best starting point for any exploration of performance management is Mario Morino's **Leap of Reason**. It is brilliantly written and supported by interesting and relatable practitioner case studies. It comes with a **library of resources** that have been classified, recommended and are continually updated by experts in the field.

Particularly recommended is the fifth essay of Patricia Brantley's **'What It Takes: Building a Performance-Management System to Support Students and Teachers'**. Patricia writes about how the Friendship Public Charter School decided what was worth measuring, and explores three lessons from the Friendship schools, which can be easily transposed to other service models:

1. Build the system to put the data in the hands of the classroom teacher
2. Build the system to support teacher development, not just assessment
3. For real breakaway performance, make the data useful for students and parents (not just administrators and teachers)

David Hunter's resources dekhconsulting.com/resources/ and book **Working Hard – and Working Well** elaborate on the 'how to' of the performance management journey. Hunter provides excellent guidance for the organisational and leadership ingredients necessary for the implementation of the sort of system described in this paper. His writing is practical and full of examples that clearly illustrate his points. The book is also very helpful with the identification of outcomes and indicators, a task many organisations find most difficult.

Savingphilanthropy.org contains a short trailer and longer film about the performance management mindset. These might be particularly useful to people who are new to the topic or a great way to start the conversation at larger

professional development events. There are also video interviews of David Hunter which are highly enlightening.

The report from the NTEN communities of impact group, **Collected Voices: Data-informed Nonprofits**, is a very readable guide to all facets of using more data in a nonprofit environment. Also, it contains a great collection of interesting stories and case studies of how the use of data has led to insights and improvements.

Transforming Performance Measurement for the 21st Century by Harry P. Hatry and published by the Urban Institute in 2014 is a 'how to' guide to help public and private service organisations design, operate and use performance management systems.

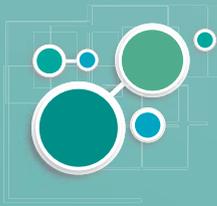
The Nonprofit Technology Network in the US publishes a **library of case studies** on all things data and information system related. They include the very technical and contain a bounty of lessons learned.

The Social Solutions Performance Management Resource Library has over 140 resources. Particularly relevant might be the webinar **Performance Management in the Public Sector**. However, searching the whitepapers, case studies, models and datasheets by service area or type of resource is the best way to find something specific.

Cooperatives might find the **Guidance on co-operative, social and environmental performance indicators** from Cooperatives UK particularly helpful.

Collective Impact projects might like Tamarack's **Community Based Strategies – Learning and Change** resources.

Isaac Castillo and Ann Emery can be watched teasing out the difference between performance management and evaluation in their fun, **five-minute video**. Tris Lumley places performance management in a map of social impact measurement practice. To view the video or diagram, please visit deliveringthepromise.org/resources/.



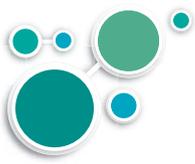
CONCLUSION

Performance management systems facilitate communication, collaboration and innovation. To the people who use them, these systems are an essential part of reliably delivering social outcomes.

As writing began, it was expected that this paper would describe in detail the critical features of a great case management IT system. As the interviews progressed, it became apparent that the heart of the system was the relationship between performance analysts and service delivery staff. Over and over again, the utility of information was expressed as a story of feedback loops created between its stakeholders, rather than how a great IT system spat out answers.

So this paper attempts to convey the attitudes of people who have succeeded in establishing these relationships. It contains their descriptions of the useful information and genuine improvements that have ensued. What has been surprising is how often insights from performance management systems challenged existing service delivery norms. This collection of stories gives a flavour of what has changed for different stakeholders, in the hope that others will learn from their experiences and commit to bringing more information to bear on the delivery of social outcomes.





FAQS

DO PERFORMANCE MANAGERS NEED TO BE EXTERNAL TO THE PROGRAM?

No. Performance management systems can be internal or external to an organisation or program of service(s). Which is more appropriate will depend on the particular case.

IS THIS ABOUT NEW SERVICES OR CAN IT BE USED FOR A CODIFIED SERVICE MODEL?

Some programs have been established to do things differently – to change how prior services have been delivered, particularly in areas where many services have failed.

In contrast, some programs have been established to test a particular model of service. For these services, performance management will be valuable to ensure successful implementation of a codified model, particularly in relation to key variables such as staff. It will also enable continuing improvement.

WHAT ABOUT SMALL ORGANISATIONS?

Services delivered and managed by only one person have almost perfect information. All feedback is received by them, they start to process trends when they see people behaving the same way or saying the same things, can adjust their service in response and see what happens when they do. A performance management system almost tries to replicate this access to information, but with more people and more organisations. Small organisations will likely have something to learn about managing performance, but their need for a formal system may be far less than larger organisations or collaborations where information does not flow so freely. As they grow, so too will their need for increased performance management capabilities.

IS THIS ALL ABOUT SOCIAL IMPACT BONDS AND PAY-FOR-SUCCESS CONTRACTS?

No. These contracting models are the most commonly referred to in this paper because the author and her interviewees have the bulk of their experience in this very tiny segment of service delivery models. Some social impact bonds are excellent examples of iterative improvement, but performance management is a much bigger agenda and relevant to many organisations that will never need nor want to engage in a social impact bond or pay-for-success contract. Performance management is relevant to those working in development, microfinance, social business, domestic welfare and the public service.

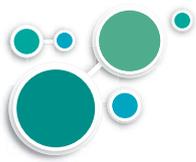
HOW DOES PERFORMANCE MANAGEMENT RELATE TO SOCIAL IMPACT MEASUREMENT

Performance management is social impact measurement that happens during service delivery so that services have a greater impact. The G8 Working Group on Impact Measurement produced seven best practice guidelines for investors that support the performance management systems described in this paper. They encourage investors to:

- Set Goals
- Develop Framework & Select Metrics
- Collect & Store Data
- Make Data-Driven Investment Management Decisions³⁶.
- Validate Data
- Analyse Data
- Report Data

No matter what perspective is chosen, Isaac Castillo captures the basic purpose well...

*The first (and perhaps most critical) step in creating a culture of outcomes measurement is getting everyone to understand this simple statement: **A nonprofit should measure outcomes for a single reason: to improve the quality of services for clients.***³⁷



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Emma Tomkinson is a social impact analyst who works on a range of measurement and investment projects for social purpose organisations. She takes a quantitative approach to social problems and programs and believes in using and creating evidence for continuous improvement. Emma's blog contains information about her work and articles she has written.

Emma has worked in the Centre for Social Impact Bonds in the UK Cabinet Office, the Third Sector Team at the UK National Audit Office, NSW Department of Premier and Cabinet, NSW Treasury and the Board of Studies NSW. She has also worked in nonprofit organisations, for the Centre for Social Impact in NSW and Social Finance in the UK. Emma is an active member of several global networks, researching for and speaking to government and nonprofit audiences.

Emma has written extensively about social impact bonds and social impact measurement. In 2013 she created the Social Impact Bond Knowledge Box for the Centre for Social Impact Bonds at the UK Cabinet Office, which included contributions from stakeholders around the world. Emma also co-authored the 2013 academic case study *The Peterborough Pilot Social Impact Bond* for Saïd Business School, University of Oxford. In Australia, Emma delivered the Social Finance Forum conference and workshops for the Centre for Social Impact. She is the author of their conference report *Social Impact Bonds: An Australian Snapshot* and their paper *A User's Guide to Australian Charity Data*. She has guest-lectured undergraduate, post-graduate and executive education classes at the University of Oxford, University of Western Australia, University of Sydney, University of Technology Sydney and University of New South Wales.



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