PERFORM: The Performance Mapping and Improvement System

Overview

What Can You Learn in This Slide Deck?

1. **What is PERFORM?**

2. **What are the key features of PERFORM?**

3. **What are the benefits of PERFORM?**

4. **What distinguishes PERFORM from other assessment tools?**

5. **How, and in what specific situations, can I effectively utilize PERFORM?**

6. **Who should use PERFORM?**

7. **What are the five performance domains?**

8. **What is the PERFORM process?**

9. **Is it possible to integrate PERFORM with other assessment tools and leverage it for improving peer learning?**

10. **Can PERFORM be customized?**

11. **How does PERFORM support localization?**

What Is PERFORM?

An easy-to-use, systems-oriented tool based on MOMENTUM Knowledge Accelerator's Enhanced Organizational Capacity Framework that assists local partners and program implementers by identifying needed performance improvement and course corrections of local organizations in a timely manner. The focus of this tool, unlike most others, is on an organization's performance rather than its latent capacity captured through evidence of its structures and documents. PERFORM can be implemented independently or to complement other capacity or performance measurement tools.

What Are the Key Features?

Focus on performance

Real time results and analysis

Uses evidence to support performance claims

Customized to an organization's needs

Flexible timing and frequency

Complementarity with other capacity measurement tools

Mirrors USAID's draft capacity development policy

Supports CBLD-9 measurement

Supports localization efforts

What Are the Benefits of PERFORM?

Places emphasis on monitoring change, rather than snapshot scores

Brings together systems thinking, resilience, and performance

Generates learning insights on organizational performance

Strengthens understanding of how to direct performance improvement

Creates 100-day improvement plans for course correction

What Distinguishes PERFORM from Other Assessment Tools?

PERFORM builds upon the experience and lessons accumulated from other capacity assessment tools to address the gaps identified from those tools.

As a system for monitoring change, PERFORM can augment this information by providing richer and more continuous insights into the how and why of performance improvement.

Who Should Use PERFORM?

Primary Audience

Non-governmental organizations seeking to improve their performance to achieve specific objectives.

Secondary Audience

Donors and implementing partners that support the performance improvement of an organization in the context of a project or partnership relationship.

How, and in What Specific Situations, Can I Effectively Utilize PERFORM?

What do I need to use PERFORM effectively?

- Users do not need specialized technology or advanced training to use PERFORM.

- You must commit to analyzing results and using those results to formulate a performance improvement plan, which is then monitored by remapping priority areas.

- The PERFORM facilitator's guide provides detailed information on implementing the different phases of the PERFORM process.

Are there contexts where PERFORM is not appropriate or recommended?

- Yes!

- PERFORM should be used only by individuals who are very familiar with the organization and who are committed to participating in a process that entails mapping, analyzing, and planning.

- PERFORM is **not suitable** for an organization with high staff turnover or an organization facing a major crisis.
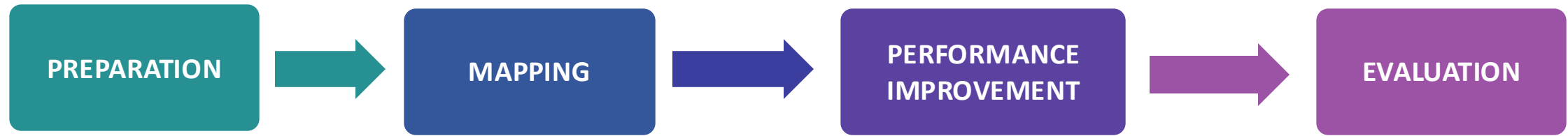
PERFORM Assesses Five Performance Domains

- By using PERFORM, organizations demonstrate evidence of performance on practices within each domain according to clear criteria.

Source: Kinghorn, M. & Levinger, B. (2021). Organizational capacity: An enhanced framework. MOMENTUM Knowledge Accelerator. https://usaidmomentum.org/resource/organizational-capacity-an-enhanced-framework/

The PERFORM Process

PREPARATION → **MAPPING** → **PERFORMANCE IMPROVEMENT** → **EVALUATION**

PREPARATION
- Assemble the team
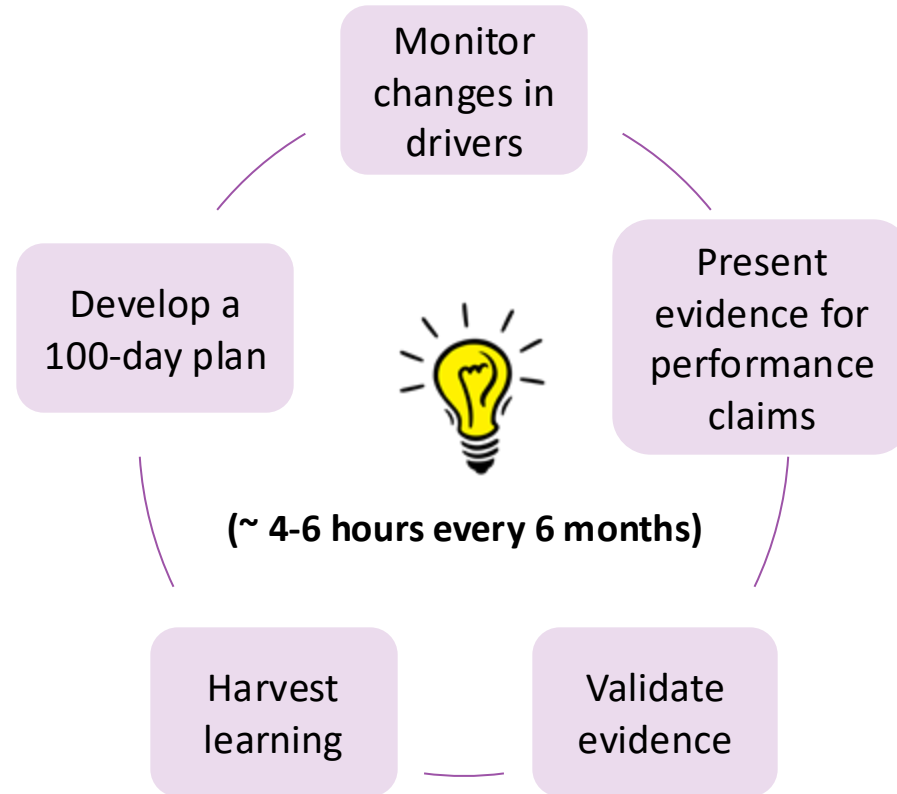- Articulate an organizational vision

(2-3 hours)

MAPPING
- Score practices by *strength* and *priority*
- Identify practices that **NEED** attention
- Score adequacy of performance drivers
- Analyze patterns to find leverage points

(6-8 hours)

PERFORMANCE IMPROVEMENT

Monitor changes in drivers

Present evidence for performance claims

Validate evidence

Harvest learning

Develop a 100-day plan

(~ 4-6 hours every 6 months)

EVALUATION
- Reassess practices for change
- Draw conclusions on progress (or not) and causes

The Performance Mapping and Improvement System (PERFORM) involves four phases over the life of a project or organizational enhancement improvement effort. These four phases provide a critical yet light touch to monitoring changes in organizational performance. The PERFORM facilitator's guide provides detailed information on implementing the above mentioned steps.

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Is It Possible to Integrate PERFORM with Other Assessment Tools?

- It is, but you don't have to!

- PERFORM is designed to serve as a stand-alone tool suite, although it can provide useful data for other capacity assessments.

- A PERFORM process may help narrow the scope of tools, such as the OCA or ITOCA, to domains with performance challenges, rather than undergoing a full assessment for areas that are performing well.

- PERFORM can also be used to build on information from an OCA by diving deeper into challenges that arise in previous assessments. The two tools can be thus used to complement each other.

Can PERFORM Be Customized?

- PERFORM was designed to function as a performance improvement system, and most users will derive optimal benefit from using all system components.

- While the use of all PERFORM'S features is recommended, we recognize that organizations differ, and one size does not fit all. Some of the adaptations may include:

  - Customizing the system by selecting components that reflect the organization's priorities such as dropping a low priority performance area or a performance area recently scored as a strength.

  - Setting the frequency of use – annually, six-monthly or quarterly.

  - Deciding on the stakeholder groups who may be involved or the nature of evidence to support performance claims.

How Does PERFORM Support Localization?

- If the essence of localization is to improve local partners' ability to enter more equitable and sustainable financial partnerships and pursue their own capacity strengthening and development goals, PERFORM can play a vital role in supporting this initiative.

- PERFORM contributes to the 14 best practices in USAID's locally led programs indicator.

- PERFORM offers several specific ways to support localization through:

  o   Fostering locally led development.

  o   Applying a systems approach.

  o   Supporting local capacity strengthening.

Are You Ready to Use PERFORM?

Check out MOMENTUM Knowledge Accelerator's full suite of PERFORM resources to get started. This bundle includes:

- User Guide: An overview of PERFORM and the steps to use it.

- Facilitator's Guide: Detailed information on facilitating each phase of the PERFORM process.

- Templates: Templates in MS Excel and MS Word for data gathering.

- 3 Recorded Presentations: Additional guidance on specific topics for users of PERFORM.

- Technical Brief: Advancing Localization through the PERFORM System.

- Frequently Asked Questions.

Are you planning to use this resource? We'd love to hear about your plans!

Take this **quick survey** to share a few details.