SECTION 01

# Welcome

Interpretation

To hear interpretation, look at the bottom of your Zoom screen and locate the globe icon that says "**Interpretation**." Click the language you would like to hear. To hear the interpreted language only, click "**Mute Original Audio**."

If you are on an Android or Apple mobile device, in your meeting controls tap the three dots, then tap "**Language Interpretation**." Tap the language you want to hear. To hear the interpreted language only, tap the toggle to "**Mute Original**." Click "**Done**."
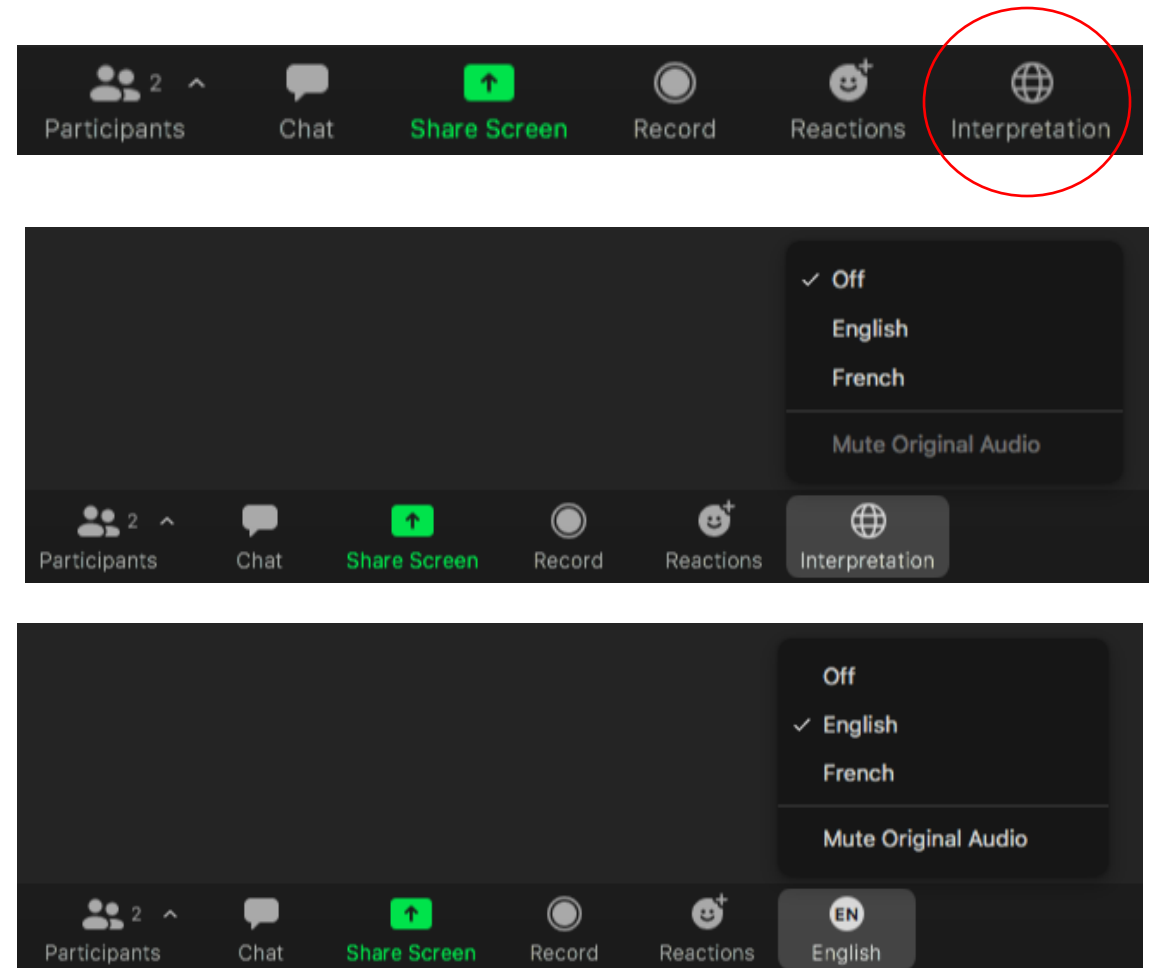
Viewing Slides in English or French

- To view the English version of the presentation, go to the top of the screen and click on "DAKOTA HAMMON's room"

- Click "CLARICE LEE's ROOM" for the French version.

Housekeeping Announcements

Introduce yourself in the chat! (name, organization, and location)

If you have any questions, please submit them through the **"Q & A" function**.

Feel free to share reflections and comments in the **chat** at any point!

This webinar series will be recorded, and the recording and webinar materials will be posted on the **MOMENTUM website**.

The MOMENTUM Suite of Awards

USAID's flagship suite of interconnected projects working in more than 40 countries to:

- Accelerate reductions in maternal, newborn, and child mortality and morbidity.

- Improve equitable access to high-quality voluntary family planning and reproductive health care.

Integrated Health Resilience

Mission-Issued Awards Malawi: **Tiyeni Tikweze Umoyo**

Routine Immunization Transformation and Equity

Country and Global Leadership

Mission-Issued Awards India: **SAKSHAM SAMVEG**

Safe Surgery in Family Planning and Obstetrics

MOMENTUM

Private Healthcare Delivery

Mission-Issued Award Yemen: **Strengthening Healthcare Access Activity in Yemen**

Knowledge Accelerator

Contents

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MOMENTUM's Contribution to Localization

An Overview of PERFORM in Supporting Local Capacity Strengthening (LCS)

Today's Discussion:

- What is PERFORM?

- What are its features and innovations?

- What results are generated?

- How is evidence gathered and utilized?

- What resources are available to interested users?

What Is PERFORM?

A systems-oriented suite of tools …

- … based on the Enhanced Capacity Development Framework

- … that assists NGO/CSOs and program implementers in identifying needed performance improvement course corrections in a timely manner.

PERFORM Innovations—Beyond Assessment to Ongoing, Internally Driven, Evidence-based Monitoring!

PERFORM stimulates critical internal, evidence-based thinking about performance.

1. Mirrors **USAID's draft Capacity Development Policy** and criteria for **CBLD-9**.

2. Centers on the *NGO/CSO's vision* of what it is trying to become or accomplish.

3. Draws upon **systems thinking**, **complexity**, **resilience**, and **adaptive management**.

4. Builds **insights** about the *why* and how organizational change occurs by examining drivers that enable or hinder +/- performance.

5. Contextualizes **sources of evidence** gathered by the organization for external validation.

6. Integrates **performance measurement and performance** strengthening—100-day plans, regular monitoring, focus on drivers.

PERFORM and USAID's LCS Principles

1. **Start with the local system.**

2. **Strengthen diverse capacities through diverse approaches.**

3. **Plan for and measure performance improvement in collaboration with partners.**

4. **Align capacity strengthening with local priorities.**

5. **Appreciate and build on existing capacities.**

6. Be mindful of and mitigate the unintended consequences of our support for local capacity strengthening.

7. Practice mutuality with local partners.

Ongoing Debate: Capacity Strengthening, Building, Developing or…?

PERFORM addresses that question from a different perspective!

- Focuses on *performance* over standardized organizational characteristics.

- Enhances an organization's *capacity to engage in self-directed performance improvement.*

- Recognizes the role of *external actors is to support* the ambitions and efforts of the local organization, not drive them.

- Believes local organizations are the heroes in their own organizational growth stories!

PERFORM Framework: 25 Practice Statements for the Performance Domains

DOMAIN #1: FOSTER SELF-DETERMINATION

- *Regularly* communicates a transformative vision of an ideal future to diverse stakeholder groups.

- *Routinely* takes initiative to mobilize resources as new community needs emerge.

- *Routinely* sets aside times for staff, volunteers, and stakeholders to reflect on values and practices.

- *Consistently* demonstrates practices that build leadership capacity at all staff levels.

- *Periodically* identifies strengths and growth areas as part of an ongoing, self-directed process of performance improvement.

DOMAIN #2: PRODUCE SUSTAINABLE RESULTS

- *Consistently* offers services that reflect user needs and preferences.

- *Routinely* works with stakeholders to create a strategy for sustaining results when external support ends.

- *Periodically* assesses current practices against quality standards.

- *Regularly* works with local communities to build upon their assets and ideas.

- *Consistently* promotes solutions that address root causes to development challenges.

DOMAIN #3: ALIGN SYSTEMS FOR AGILITY

- *Routinely* tasks cross-functional teams to meet objectives.

- *Consistently* takes steps to recruit staff members from the local community.

- *Consistently* manages finances so stakeholders receive timely, useful, and accurate information.

- Secures *sufficient* support from different sources to ensure that funding streams are diversified.

- Maintains reserve funds to cover at least two months of operational activity.
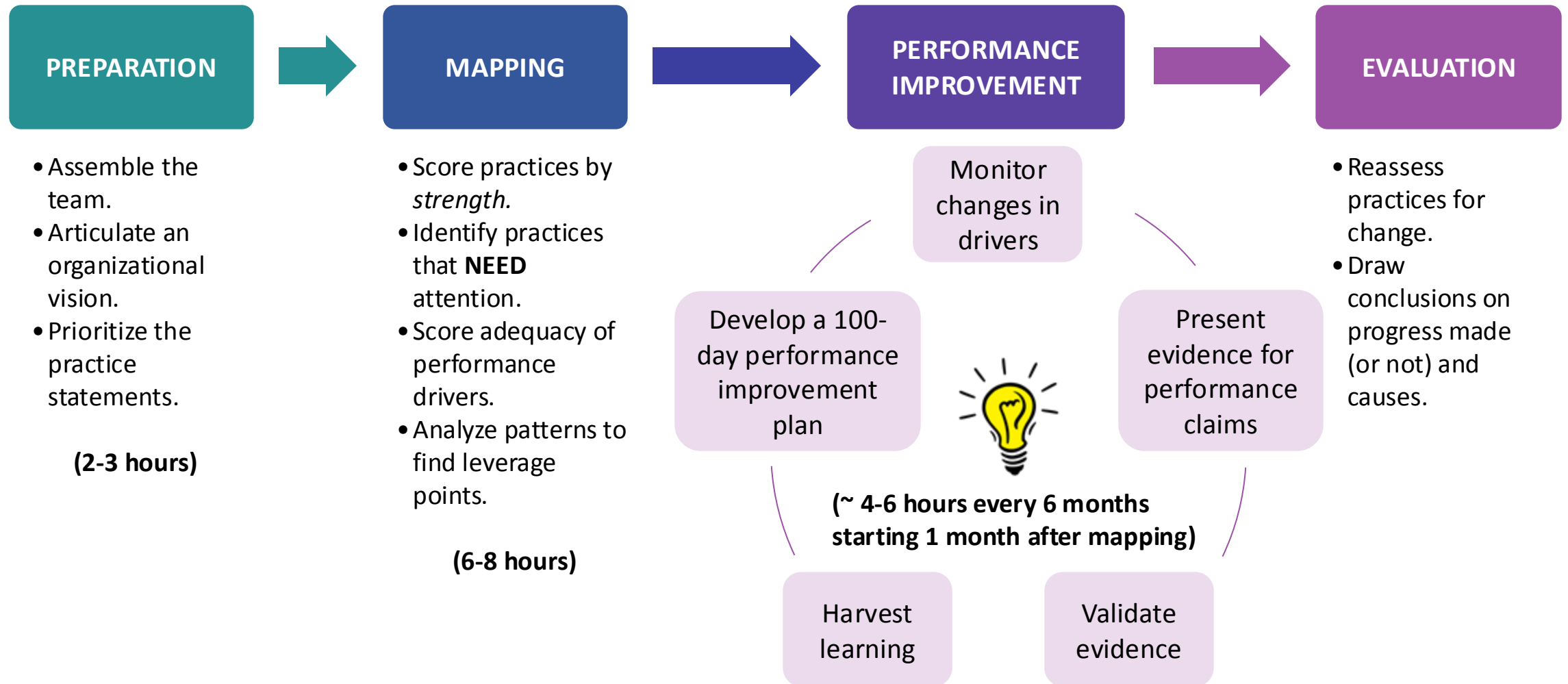
DOMAIN #4: LEARN & ADAPT

- *Routinely* solicits and uses stakeholder feedback to expand impact.

- *Regularly* scans for trends relevant to organizational mission and services.

- *Regularly* uses data to monitor project performance.

- Meets *regularly* to learn lessons from project successes and failures.

- *Routinely* fosters innovation by testing out new ideas.

DOMAIN #5: ATTRACT & SUSTAIN SUPPORT

- *Regularly* communicates with stakeholders about organizational achievements and challenges.

- *On an ongoing basis*, provides stakeholders, with meaningful opportunities to contribute to the organization's work.

- *Actively* participates in multi-stakeholder networks.

- *Frequently* shares useful information and valuable resources with peer organizations.

- *Frequently* takes joint action with cross-sectoral actors to address issues of common concern.

What Does the PERFORM Process Look Like?

| PREPARATION | → | MAPPING | → | PERFORMANCE IMPROVEMENT | → | EVALUATION |

PREPARATION
- Assemble the team.
- Articulate an organizational vision.
- Prioritize the practice statements.

(2-3 hours)

MAPPING
- Score practices by *strength.*
- 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

Develop a 100-day performance improvement plan

Present evidence for performance claims

Harvest learning

Validate evidence

(~ 4-6 hours every 6 months starting 1 month after mapping)

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

Key PERFORM Terms

Performance Rating

Each practice statement is rated by the extent to which the organization demonstrates the practice.

Practices are rated using the three-point scale below.

Priority Rating

Each practice is also rated on a three-point scale describing the level of importance (priority) that practice holds for achieving the performance goal.

Urgency Index

This index sorts mapping results by priority rank and performance rating to facilitate decision-making about where capacity-strengthening efforts and resources should be directed *(automatically generated)*.

Performance Drivers

Performance drivers are also identified for each practice to sheds light on the "whys" of organization's performance in each area of practice to help pinpoint where resources should be directed.

Performance Rating
Strength: This statement very accurately describes us.
Asset: This statement somewhat accurately describes us.
Challenge: This statement is far removed from what we do.

Priority Rating
High: Critical to success *at this time.*
Medium: Important but not critical to success *at this time.*
Low: Not important to success *at this time.*

Urgency Index

Priority Rating	Challenge	Asset	Strength
High	URGENT	URGENT	OPTIONAL
Med	URGENT	OPTIONAL	NOT NEEDED NOW
Low	OPTIONAL	NOT NEEDED NOW	NOT NEEDED NOW

Performance Rating

Performance Drivers
• Knowledge/skills.
• Resources.
• Supportive leadership.
• External relationships.
• Norms or culture.

PERFORM Scoresheet

Performance Domain	Practice Statements	Priority Rating	Performance Rating	Urgency Index	Performance Drivers				
					Res	Rel	SL	K/S	N/C
Produces Sustainable Results	6. *Consistently* offers services that reflect user needs and preferences								
	7. Routinely works with stakeholders to create a strategy for sustaining results when external support ends								
	8. *Periodically* assesses current practices against quality standards								
	9. *Regularly* works with local communities to build upon their assets and ideas								
	10. *Consistently* promotes sol... root causes for ...ment challenges								

Callout labels: Performance Domain, Practice Statements, Priority Rating, Performance Rating, Urgency Index, Performance Drivers, Driver Rating

Key Terms

Priority Rating

High: Critical to success *at this time*

Medium: Important but not critical *at this time*

Low: Not important *at this time*

Performance Rating

Strength: This statement very accurately describes us

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Challenge: This statement is far removed from what we do

Urgency Index

Priority Rating	Challenge	Asset	Strength
High	URGENT	URGENT	OPTIONAL
Med	URGENT	OPTIONAL	NOT NEEDED NOW
Low	OPTIONAL	NOT NEEDED NOW	NOT NEEDED NOW

Performance Rating

Performance Drivers

Res: Resources

Rel: External relationships

SL: Supportive leadership

K/S: Knowledge or skills

N/C: Norms or culture

Driver Rating

Driver is:

3: Fully adequate to support strong performance

2: Partially adequate to support strong performance

1: Inadequate to support strong performance

Mapping Analysis in Excel

Driver Scoresheet

Click here to refresh table	Practice Priority.	Practice rating	Urgency	Driver: Resources	Driver: Relationships	Driver: Leadership support	Driver: Skills/ knowledge	Driver: Norms
Attracts & sustains support								
Regularly communicates with stakeholders about organizational achievements and challenges								
Provides stakeholders, on an ongoing basis, with meaningful opportunities to contribute to the organization's work								
Actively participates in multi-stakeholder networks								
Frequently shares useful information and valuable resources with peer organizations								
Frequently takes joint action with cross-sectoral actors to address issues of common concern								
Aligns systems for agility								
Routinely tasks cross-functional teams to meet objectives								
Consistently takes steps to recruit staff members from the local community								
Consistently manages finances so that stakeholders receive timely, useful and accurate information.								
Secures sufficient support from different sources to ensure that funding streams are diversified								
Maintains reserve funds to cover at least two months of operational activity.								
Fosters self-determination								
Regularly communicates a transformative vision of an ideal future to diverse stakeholder groups								
Routinely takes initiative to mobilize resources as new community needs emerge								
Routinely sets aside times for staff, volunteers, and stakeholders to reflect on values and practices								
Consistently demonstrates practices that builds leadership capacity all staff levels								
Periodically identifies strengths and growth areas as part of an ongoing, self-directed process of capacity development								
Learns & adapts								
Routinely solicits and uses stakeholder feedback to expand impact								
Regularly scans for trends relevant to organizational mission and services								
Regularly uses data to monitor project performance								
Meets regularly to learn lessons from project successes and failures								
Routinely fosters innovations by testing out new ideas								
Produces sustainable results								
Consistently offers services that reflect user needs and preferences								
Routinely works with stakeholders to create a strategy for sustaining results when external support ends								
Periodically assesses current practices against quality standards								
Regularly works with local communities to build upon their assets and ideas								
Consistently promotes solution that address root causes for development challenges								

Legend

Practice Priority
- ▲ High (1)
- ▬ Medium (2)
- ▼ Low (3)

Practice Rating
- 🔴 Challenge (1)
- 🟡 Asset (2)
- 🟢 Strength (3)

Urgency
- 🚩 Urgent
- 🏴 Optional
- 🏁 Not Needed Now

Driver Rating
- ⬇ Inadequate (1)
- ➡ Partially Adequate (2)
- ⬆ Fully Adequate (3)

Mapping Analysis in Excel (Using Filters)

Practice Priority	Urgency Index	Practice rating	Driver: Resources
1	Not Needed Now	1	1
2	Optional	2	2
3	Urgent	3	3

Driver: Relationshi...	Driver: Leadership ...	Driver: Skills/knowl...	Driver: Norms
1	1	1	1
2	2	2	2
3	3	3	3

Using Filters to Support Analysis

URGENCY

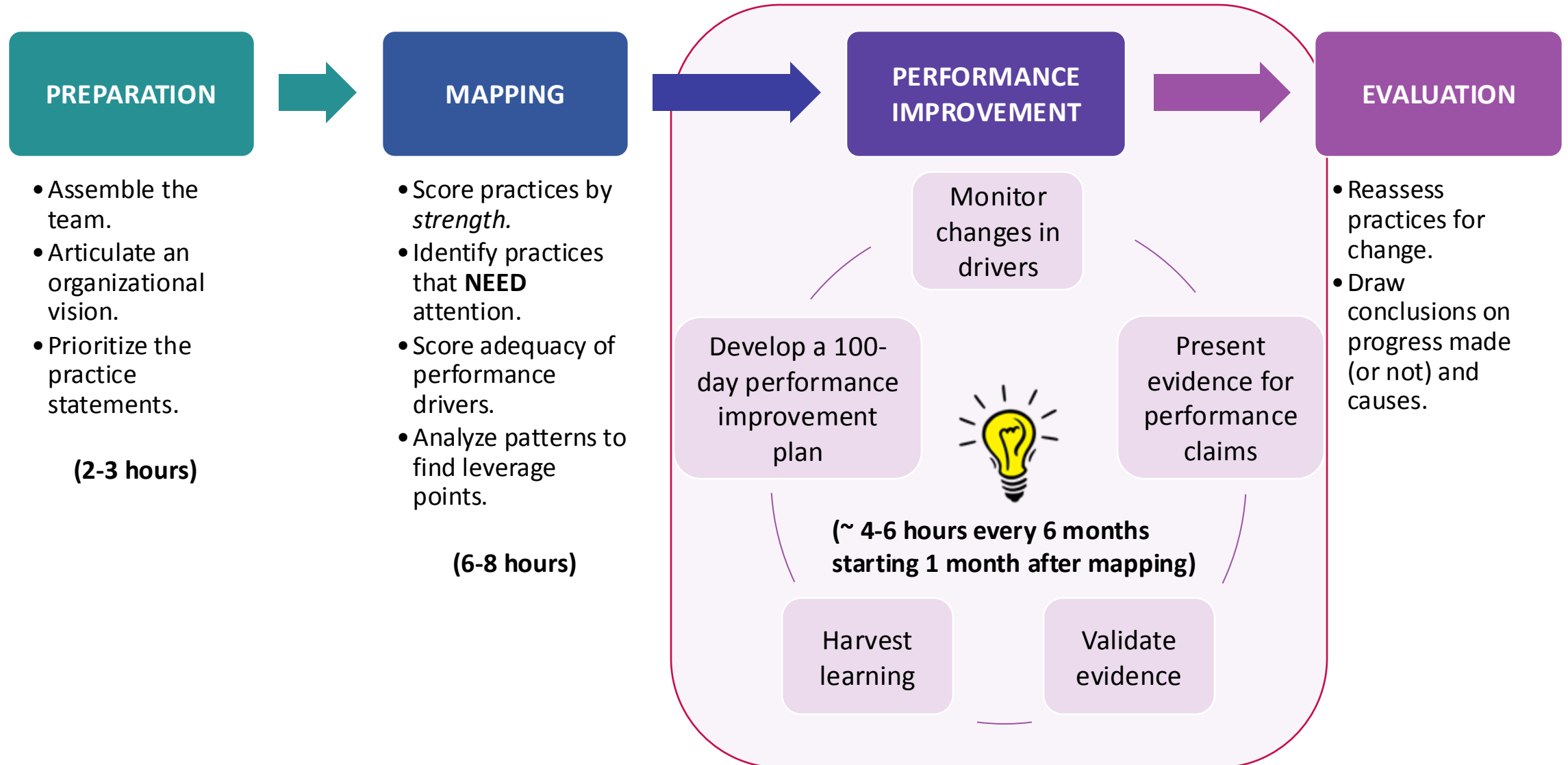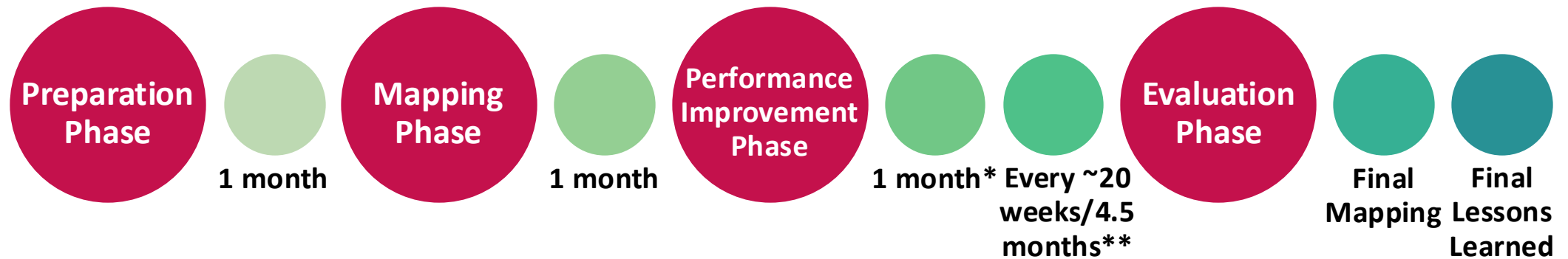| Click here to refresh table	Practice Priority.	Practice rating	Urgency	Driver: Resources	Driver: Relationships	Driver: Leadership support	Driver: Skills/knowledge	Driver: Norms
Attracts & sustains support								
Provides stakeholders, on an ongoing basis, with meaningful opportunities to contribute to the organization's work	—	🔴	🚩	→	→	↓	↓	→
Frequently shares useful information and valuable resources with peer organizations	▲	🟡	🚩	→	↑	↓	→	↓
Frequently takes joint action with cross-sectoral actors to address issues of common concern	—	🔴	🚩	↓	↓	→	↓	↑
Aligns systems for agility								
Consistently takes steps to recruit staff members from the local community	▲	🟡	🚩	↑	↑	→	↑	→
Learns & adapts								
Regularly uses data to monitor project performance	▲	🔴	🚩	→	↑	↓	↓	↓
Produces sustainable results								
Consistently offers services that reflect user needs and preferences	▲	🟡	🚩	→	↓	→	↑	→
Periodically assesses current practices against quality standards	▲	🔴	🚩	↑	↑	→	→	↓

PRIORITY

Click here to refresh table	Practice Priority.	Practice rating	Urgency	Driver: Resources	Driver: Relationships	Driver: Leadership support	Driver: Skills/knowledge	Driver: Norms
Attracts & sustains support								
Frequently shares useful information and valuable resources with peer organizations	▲	🟡	🚩	→	↑	↓	→	↓
Aligns systems for agility								
Consistently takes steps to recruit staff members from the local community	▲	🟡	🚩	↑	↑	→	↑	→
Fosters self-determination								
Routinely takes initiative to mobilize resources as new community needs emerge	▲	🟢	🚩	→	→	→	→	↓
Learns & adapts								
Regularly uses data to monitor project performance	▲	🔴	🚩	→	↑	↓	↓	↓
Produces sustainable results								
Consistently offers services that reflect user needs and preferences	▲	🟡	🚩	→	↓	→	↑	→
Periodically assesses current practices against quality standards	▲	🔴	🚩	↑	↑	→	→	↓

What Happens *After* the Mapping?

PREPARATION

- Assemble the team.
- Articulate an organizational vision.
- Prioritize the practice statements.

(2-3 hours)

MAPPING

- Score practices by *strength.*
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PERFORMANCE IMPROVEMENT

Monitor changes in drivers

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Validate evidence

(~ 4-6 hours every 6 months starting 1 month after mapping)

EVALUATION

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

PERFORM Improvement Monitoring Schedule

Preparation Phase — 1 month — **Mapping Phase** — 1 month — **Performance Improvement Phase** — 1 month* — Every ~20 weeks/4.5 months** — **Evaluation Phase** — Final Mapping — Final Lessons Learned

* First monitoring (*evidence validation; 100-day plan*)

** Ongoing first monitoring (*progress mapping; evidence validation; 100-day plan*)

Evidence: Confirms We Are Doing What We Say We Are Doing

Evidence can be:

- ✓ Manuals, reports, documents.
- ✓ Stakeholder interviews and surveys.
- ✓ Photos or news clipping from an event.
- ✓ Audio files with stakeholder comments.

Think beyond what is normally accepted as evidence to make the process realistic and productive.

Note: One piece of evidence may be used to support multiple performance claims, as long as it is relevant to each claim.

PERFORM Can Be Customized

- Changing a performance area.

- Modifying Practice Statements.

- Setting frequency of use.

- Selecting evidence to support performance claims.

- Engaging stakeholders.

- Sharing results.

- Choosing results analysis tools.

- Facilitating the PERFORM process.

- Scheduling the initial mapping.

Can be adapted to complement other assessment tools in measuring CBLD-9.

PERFORM Resource Package

- **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.

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

- **Technical Brief:** *Advancing Localization through the PERFORM System*.

- **Frequently Asked Questions**.

Available on the MOMENTUM webpage
(https://usaidmomentum.org/resource/perform/)

Using PERFORM in Timor, Indonesia

SECTION 05

Moderated Discussion

THANK YOU

THANK YOU

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