performance hub

Performance and Race Equality Project

Research Report

September 2007

A Performance Hub Report
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The Performance Hub works to help third sector organisations (TSOs)* achieve more.

(*charities, voluntary organisations, community groups and social enterprises)

Our vision is of high performing TSOs having a positive impact upon the lives of millions.

Our overall aim is for improved third sector performance, and performance to be an integral part of the third sector's agenda.

Four specific aims contribute to this overall aim:
- To increase TSOs' awareness of the benefits of focusing on performance and improve their ability to use performance tools and approaches.
- To increase and improve the performance support offered to frontline organisations by local, sub-regional, regional and national infrastructure of all types
- To develop a more relevant, more effective and more accessible knowledge base about third sector performance.
- To strengthen the two way relationship between funders and TSOs on performance issues.

For more information, see our website at www.performancehub.org.uk

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Executive Summary

This research commissioned by the Performance Hub examines whether existing performance improvement approaches are relevant to the black and minority ethnic (BME) third sector, whether performance improvement can assist BME organisations to achieve their social mission, and whether the BME sector has specific support needs that are distinct from those of 'mainstream' organisations. The project was delivered between May 2006 and March 2007 by b:RAP, a strategic agency for equality issues based in Birmingham.

Aims

The aims of this research project were to:
- improve understanding about the performance needs of BME organisations;
- understand what kind of performance support is currently available to BME organisations; and
- develop ideas and approaches that can help all infrastructure organisations to improve the support they offer.

Methods

Our research was conducted in two phases:

- Phase 1: Desk-based research and a literature review, followed by telephone interviews.
- Phase 2: A programme of action learning involving grant-funding five third sector organisations to improve their performance or performance support, culminating in case studies.

Key findings

Phase One

A national survey of BME frontline organisations and both BME and 'generic' infrastructure support organisations revealed that:

- Only just over one-quarter (28%) of frontline organisations interviewed had received any performance improvement support.
- BME organisations demonstrated a low awareness of what performance support is available from infrastructure agencies.
- Very few BME organisations specifically ask for support with 'performance improvement'.
- However, the majority of respondents could point to specific issues they would like assistance with, such as help with:

    o Evaluating their social and community impact and the effectiveness of their lobbying, advocacy and campaigning.
    o Strategic planning to maintain their autonomy and local community accountability, while also planning for growth, development and sustainability.
    o How to share experience and expertise with other BME organisations in an increasingly competitive environment.
    o Assuring the quality of lobbying, advocacy and campaigning activities.

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- There are a number of barriers to BME organisations engaging with performance improvement:
  - Many BME organisations find it difficult to find the time and resources to focus on their performance.
  - There are a number of negative perceptions about performance improvement. Some organisations see it as primarily an imposition by funders and purchasers or feel it diverts limited resources from their core work.
  - Broader social forces are resulting in a volatile and rapidly changing environment for BME organisations. As conceptions of diversity have become much broader and more complex, more BME organisations are seeking to operate in the 'mainstream'. BME organisations often don't see how performance improvement can offer them the tools and skills they need in order to adapt and reposition themselves in this rapidly changing marketplace.

Phase Two

Five third sector organisations were given small grants to undertake dedicated work to improve their own performance or their performance support. Their experiences have been written up as case studies.

These live case studies showed that, where performance improvement approaches have clear objectives that are contextualised and embedded in the real life circumstances of the organisation, they can increase the effectiveness of the organisation.

They illustrate that performance improvement can help organisations:-
- improve relationships with both purchasers and funders
- raise the quality of services and their outcomes for clients
- demonstrate the social and community value of their work and
- strengthen their social mission.

Recommendations

In concluding this work, b:RAP makes recommendations to frontline BME organisations, infrastructure organisations, and funders and purchasers. The Performance Hub supports these recommendations.

BME organisations

BME organisations should:-

- Consider which approaches to performance improvement are best for their organisation at a particular moment in time

    This should be based on an analysis of their own needs and ambitions, rather than being led by funders' demands.

- Negotiate monitoring and evaluation requirements with their funders and purchasers

    Appropriate monitoring and evaluation processes are essential to help organisations know whether they are achieving their aims. BME third sector organisations should negotiate the regulatory requirements of their funders and purchasers so that they provide useful information for both parties. They

should be assertive with funders who attempt to insist on inappropriate processes or requirements.

- Plan for performance improvement

    BME organisations can ensure they have sufficient capacity to engage with performance improvement by planning ahead. This will involve identifying their chosen approach, the costs involved and how service delivery and users would benefit. They should include a proportion of these costs in their funding bids.

- Identify what support they need to improve their performance and actively seek this support

    BME organisations should think about what external support they need and what they want to get out of that support. They should think creatively about where to find support, based on the skills and expertise they need. This might include financial support, advice, training, and information.

- Share learning with other BME organisations

    There is great potential for BME organisations to learn from each other in areas of common concern, such as how to demonstrate the impact they are making, or how to lobby local decision-makers on issues of race equality.

Infrastructure organisations

Infrastructure organisations should:-

- Ensure they possess the skills and knowledge needed to deliver support to BME third sector organisations

    Development workers in both BME and 'generic' infrastructure organisations supporting a diverse range of organisations need skills such as:-
    - treating everybody equally with respect
    - communicating in an open and accessible way.

    In order to support BME organisations specifically, development workers should develop a wider knowledge and awareness of the local voluntary sector and issues of deprivation and race equality, rather than just their 'cultural awareness'. Managers should ensure that development workers have the right skills, knowledge and awareness.

- Promote their support more clearly, basing their offer on their particular skills and knowledge rather than cultural or ethnic identity

    There needs to be a much clearer offer from infrastructure providers, with clear guidance on what client organisations should expect. Both BME and generic infrastructure organisations should be able to offer specific skills and expertise, explaining how and when organisations can benefit from their services.

    Moving beyond providing support tailored for particular ethnic groups could put BME infrastructure organisations in a much more responsive position to provide for an increasingly diverse population.

- Contextualise performance support

Infrastructure organisations need to ensure that performance support is more contextualised within the complex real life environment in which BME third sector organisations operate. For example, they could provide support on monitoring and evaluating racial equality outcomes and campaigning work, or balancing long-term strategic planning with responding to changes in community needs.

- Promote the benefits of performance improvement more effectively

    Infrastructure organisations face a significant challenge in promoting the benefits of performance support to BME organisations. This includes identifying the relevance of performance improvement techniques for the BME sector.

Funders and purchasers

Funders and purchasers should:-

- Encourage collaboration between BME and generic third sector organisations

    Collaboration between generic and BME infrastructure organisations can help improve performance support for BME organisations. Funders should provide funding schemes to encourage this.

- Fund third sector activities on the basis of need rather than cultural or ethnic identity

    Funders and purchasers should identify the outcomes they are looking for and the kinds of skills and expertise third sector organisations need in order to deliver those outcomes, rather than assuming that BME organisations' expertise lies in helping people from a particular ethnic group.

- Fund relevant performance costs as part of sustainable funding agreements

    Many BME organisations regard performance improvement as a luxury they cannot afford, when in fact it is something they cannot do without. Purchasers and funders should aim to get more for their money by working to Compact principles and funding a proportion of performance improvement costs.

- Adopt a more flexible approach to reporting

    Funders and purchasers can get more meaningful information on how the organisations they fund are making a difference, and avoid imposing an unnecessary cost burden, by negotiating reporting requirements with them.

1.0 Introduction

The ChangeUp strategy[1], which the Performance Hub and other initiatives work to deliver, called for a "step change in the commitment and practice of generalist infrastructure in reaching beyond the mainstream to tackle inequality".

There is a concern that BME organisations are less likely to access support for performance improvement than 'generic' third sector organisations.

This report is the culmination of a project commissioned by the Performance Hub in 2005-06 to:

- improve understanding about the performance needs of BME organisations;
- understand the existing provision of support on performance available to those organisations; and
- develop ideas and approaches that can help all infrastructure organisations, both generic and specific, to improve the support they offer.

This report is written by b:RAP, a strategic agency for equality issues based in Birmingham, for the Performance Hub.

1.1 Background and scope of the project

There is a recognised legacy of discrimination and under-development in the third sector. Consequently some BME infrastructure organisations face particular difficulties in providing frontline organisations with appropriate support that is timely, that meets 'real life' development needs, and is of consistent quality. Studies[2] have also identified other gaps in the BME sector in relation to the skills base, opportunities and capacity to influence policy, and of course the ability to secure long term funding.

The Performance Hub wanted to develop a deeper understanding of the opportunities and barriers to improving performance in BME organisations, of the kind of support currently offered to them by infrastructure organisations, and of the support they actually need.

b:RAP was commissioned to undertake a programme of research, analysis and action learning which would illuminate these issues.

There were seven central questions that the Performance Hub wanted to answer during this project:

1.   Are the performance needs of BME organisations different from other third sector organisations, or not?

2.   How do BME organisations benefit from performance improvement?

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[1] *ChangeUp Capacity Building and Infrastructure Framework for the voluntary and community sector* (London, Home Office, 2004)
[2] See Ellis J and Latif S *Capacity building black and minority ethnic voluntary and community organisations* (London, Charities Evaluation Services, 2006). See also Chouhan K Lusane C *Black voluntary and community sector funding: Its impact on civic engagement and capacity building* (London, Joseph Rowntree Foundation, 2004)

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3.   Do performance improvement approaches help BME organisations to improve race equality?

4.   What helps/hinders BME organisations accessing performance improvement support?

5.   What type of support is currently provided?

6.   What do BME organisations want from performance improvement support?

7.   How can infrastructure organisations best be supported to develop the kind of performance improvement support BME organisations want and need?

We considered the third question to be an especially important one because there is an underlying assumption in much current public policy that the work of BME third sector organisations not only improves the quality of life of BME communities but also plays a pivotal role in progressing race equality. The research offered an opportunity to reflect critically on this and to examine whether any clear link could be drawn.

1.2   Terms used in this project

It is helpful to explain some of the terms used in this report.

Third sector organisations (TSOs)

This term refers to all non-profit making organisations, including charities, voluntary organisations, community groups and social enterprises.

BME

Black and minority ethnic.

BME organisations

The BME third sector is extremely diverse, and third sector organisations are called 'BME organisations' for a number of reasons – for example, because:

- their services are directed at one or more BME communities
- their trustees, paid staff and volunteers are from BME communities
- the organisation's mission or purpose is to improve race equality
- the organisation defines itself as 'BME'
- the organisation has developed from a faith or ethnically-based community.

While these definitions remain the subject of sometimes heated discussion, for the purposes of this project we refer to an organisation as 'BME' if it meets any of the criteria above.

There are also different types of BME organisations in the third sector, particularly:

- *BME frontline organisations* - TSOs that work directly with the public, or particular target groups or communities

- *BME infrastructure organisations* – organisations that provide support and/or representation to frontline TSOs (also called 'second tier' organisations).

For the purposes of this report, we use *BME organisations* and the *BME sector* to refer to both BME frontline and infrastructure organisations in England and the English regions. Where a distinction is required between these two types of organisations we refer to *BME frontline organisations* and *BME infrastructure organisations*. We also use the terms *generic* or *mainstream* to refer to organisations that are not BME-led.

Performance improvement

The Performance Hub uses the term 'performance' to mean the extent to which an organisation achieves its mission and makes a difference. Improving performance is a continuous process of review and action which, taken together, offers a planned and structured process of performance improvement. There are many different tools, approaches and systems that can help an organisation improve its performance, including:

- thinking ahead by developing and implementing a strategy
- planning to bring a strategy to life
- assuring quality
- tracking progress by monitoring its activities and evaluating the effect of these activities
- sharing learning through benchmarking or peer review
- marketing and involving users
- making changes happen and ensuring they last.

Performance improvement support

Performance improvement support is any kind of help offered to organisations specifically to improve their performance. In this report we focus in particular on the performance improvement support available to BME frontline organisations.

Racial equality

By equality we mean equal rights and opportunities for everyone in all areas of activity.

When groups of people see themselves, or are perceived by others, to be racially distinct from the rest of a population, the question that arises is whether members of these groups are treated equally by the law, by the officials who administer the law, by public institutions and by other people in their community.

Equality of opportunity means what is often called 'a level playing-field'. For example, in a competition for jobs, housing or education, no applicant should be disadvantaged because of his or her race, colour, nationality or ethnic or national origins.

2.0 Performance and Race Equality: the context

Performance improvement in the third sector is about making more of a difference. It is about achieving more and about creating better quality organisations.

2.1 Performance and the third sector

While not new, interest in the performance of third sector organisations has grown in recent years, both inside and outside the sector. A number of wider environmental factors have contributed to this, including the following:

- Increasing competition for funding and pressures on local authority grant funding has encouraged organisations to assess their performance as a means of evidencing their value to funders and differentiating their organisation from the competition.

- TSOs themselves are increasingly interested in achieving more for their beneficiaries.

- There is a growing demand from the general public, donors and the media for the third sector to be more transparent and accountable.

- The shift towards third sector organisations providing public services, together with higher expectations of those services, has led to a greater pressure on TSOs to demonstrate their value and impact.

- As the role of local public spending bodies shifts from provider to purchaser, they have new responsibilities to ensure value for money and service quality.

- Increasing numbers of purchasers are demanding the use of quality standards to assure and guarantee the quality of the services they purchase.

This has brought both challenges and opportunities for the sector. As well as helping to put performance firmly on the sector's agenda, these changes have also affected how the BME sector is viewed and supported by infrastructure.

More and more third sector organisations are focusing on their performance to ensure they continue to meet the needs of users whilst sustaining and developing themselves. Many organisations find established performance improvement approaches such as strategic planning, quality assurance, monitoring and evaluation and benchmarking, to be helpful ways into this. However, persistent barriers to focusing on performance include lack of time and resources, and this is particularly true for small, frontline organisations. Some organisations do find the idea of performance – and the need for improvement – threatening. Some are reluctant to embrace change, worrying that asking questions about the organisation will throw up difficult challenges. Others fear that 'continuous improvement' is an endless process with the potential to divert resources away from their social mission.

The Performance Hub produces guidance, advice and support to help third sector organisations to view improvement as a journey; an investment that will help them achieve more through thinking, planning and doing. It also encourages organisations to assess carefully the relative benefits and costs of different approaches.

2.2   Performance and the BME sector

The BME sector is sometimes seen as having issues and concerns distinct from the mainstream third sector, with BME organisations more likely to:

- be small in terms of income
- be less-established, younger organisations
- be disproportionately affected by language and cultural issues, and less well networked
- operate across administrative boundaries; and
- have a strong focus on community self-help.

BME infrastructure organisations have developed either where generic infrastructure organisations have been unresponsive to the needs of BME groups or where BME organisations regard themselves as having specialist needs that they feel cannot be met by generic infrastructure organisations.

However, roles are changing and traditional assumptions about BME organisations are being challenged. Organisations that at one time would have operated with a mission determined almost exclusively by their ethnic/cultural origins or affiliation are now increasingly operating in the 'mainstream' and some BME organisations are struggling to relocate themselves in this wider, open marketplace. Their original mission may now be in question, and with this, their sense of legitimacy. This process is somewhat similar to that of private sector businesses that find they must diversify or restructure in order to avoid decline or survive other major shifts in the marketplace.

Broader social forces are also at work. Twenty years ago, and even during the past decade, BME organisations were seen primarily as serving (and in some cases representing and advocating on behalf of) clear, distinct BME constituencies. Indeed, this was a central tenet of the multicultural policies that largely determined BME community sector formation, growth and day-to-day operation: BME voluntary and community organisations were the conduits through which policy makers related to, and sought to meet the needs of, minority communities.

The concept of diversity has now broadened and become more complex, with an ever-changing flux in new arrival groups, including refugees and asylum-seekers, attempting to develop a foothold for themselves and their community organisations. The idea of clear 'constituencies' based on ethnic origin makes less sense than it did twenty years ago. The basis therefore, on which BME organisations were previously established and funded, is becoming out of step with an increasingly diverse and global society. Indeed, the Commission on Integration and Cohesion has asserted in its report 'Our Shared Future' (June 07) that '…policies can no longer be based on working with migrants from a limited number of countries; who are in the UK for good; and are assumed to have a single fixed identity'. These ideas are gaining credibility, as Britain's longstanding relationship with multiculturalist policies come under more scrutiny. It is clear that the environment in which BME organisations operate is changing as a consequence of the re-thinking on how we address issues of equality and identity. There is also the challenge of greater competition between diverse groups for funding, influence and legitimacy. Consequently, the future for BME organisations is significantly more volatile than that faced by many 'non-BME' organisations.

Whilst BME organisations may need specific support to navigate these social and political changes, their additional support needs do not derive specifically from their ethnicity. Rather, they are a consequence of a range of current and historical

drivers, not least UK race relations legislation, that have played a huge part in shaping the BME third sector landscape.

Many BME organisations do not prioritise performance improvement, and do not see that it might help them plan, develop and reposition themselves successfully in the sector's changing environment. One of the major challenges for performance improvement support is to ensure that it is relevant to and linked in with these wider structural changes. Local and national support providers have a key role to play in ensuring that their work takes account of the way these broader changes are affecting BME organisations, and is explicit in making the link between performance support and this changing context.

3.0 Method

Our research was conducted in two phases.

3.1 Phase One: Desk research

The purpose of our phase one research was to:

- Map the extent and type of performance support provided by infrastructure to BME frontline organisations, focusing on but not limited to BME infrastructure.

- Examine what performance improvement support is needed by BME frontline organisations across the Hub's four main topic areas (strategy, evaluation, quality and benchmarking).

- Gain a better understanding of what shapes demand for performance improvement in BME frontline organisations.

- Identify potential issues to explore in more detail in phase two of the project.

Phase one comprised desk-based research and a literature review, followed by telephone interviews. The aim of the desk research was to gain a fuller understanding of previous analyses of the needs of BME frontline organisations in relation to performance improvement support. We reviewed previous mapping exercises, published research papers and other reports. (See References for a list of the documents reviewed.)

Our interviewing was conducted with a selection of 80 third sector organisations – mainly but not exclusively BME organisations – including 30 infrastructure organisations and 50 frontline organisations.

In constructing the core sample of organisations from which our interviewees were drawn, attention was paid to ensuring a sufficiently stratified and representative spread of organisations including a diversity of geographical locations and service specialisms. We did this by using data sources from local authorities, councils for voluntary service (CVS) (and voluntary action groups), Citizens Advice Bureaux (CABx), community organisations, and numerous websites.[3] We also ensured that our sample of frontline organisations included both BME organisations that work on a range of issues and those which are 'single issue-based' (focusing on women, for example, or refugees and asylum seekers). We also ensured a spread of specific ethnic groups including African, African-Caribbean, Indian, Bangladeshi, Pakistani and Chinese, based on an analysis of the kind of organisation involved and its primary beneficiary groups.

For our sample of infrastructure organisations, we also wanted a mix that would enable some comparison between specifically BME infrastructure organisations and generic infrastructure organisations (i.e. infrastructure agencies that support all third sector organisations within a geographic area and do not have a specific sector specialism). We identified 10 generic and 20 specifically BME infrastructure organisations in a sample which included local infrastructure agencies, a small

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[3] It has been suggested that there are 'more than 5000 BME [organisations] in England and Wales'. See McLeod M, Owen D and Khamis C *Black and Minority Ethnic Voluntary and Community Organisations: their role and future development in England and Wales* (London, Joseph Rowntree Foundation, 2001) p. 14.

number of race equality councils, and issue-based groups providing infrastructure services for their own region or area. The sample included organisations in London and all of the English regions.

3.2   Phase Two: Case studies

Phase two of the research consisted of a programme of action learning. Working in partnership with the Performance Hub we used a programme of small grants (between £5K and £7K) to enable five third sector organisations to undertake dedicated work on improving either their own performance, or the performance support they were able to offer smaller third sector organisations. Our intention was to use small grants to give some organisations the opportunity to focus on their own performance and in return to provide the project with practical learning and real-life examples of the issues and opportunities faced by BME organisations when focusing on their performance.

The issues covered in phase two were influenced by the findings of the interviews in phase one, and this helped us to identify a range of factors that play a significant part in determining the extent to which performance improvement approaches can help BME organisations develop and improve their services and organisations. The grants phase covered the following themes:

- Thinking ahead and planning for the future
- Improving performance and working towards equality
- Collaborating to support performance.

The case studies from grant recipients are featured in section five. The grants were an opportunity for frontline organisations to try out performance-related work they were interested in undertaking and that would be useful for their organisation. The project did not prescribe which approach the grant recipients should take, but we were clear that the Hub wanted to be able to use the subsequent case studies to:

- Understand the specific challenges and issues BME organisations face when planning a strategy for their work and identifying the related performance support needs they might have.

- Explore the link between performance improvement approaches and race equality outcomes. Does getting better at performance improvement in the BME sector mean that race equality outcomes will be achieved for communities?

- Identify how infrastructure organisations can work together to better support the performance needs of BME organisations.

We received 23 applications for five grants. The list below outlines the geographic spread of applicants:

North East	0
Yorkshire	11
North West	1
West Midlands	0
East Midlands	1
East	4
London	5
South East	1

South West	0

The small grants programme was promoted to all English regions, but the highest response came from Yorkshire. Anecdotal evidence from applicants suggests that a number of well-connected networks in the region may have played a part in increasing the response rate.

4.0 The Research Findings: Phase one – Desk research and survey

Phase one findings are drawn from our desk research and the national telephone interviews we conducted.

Only a minority of the BME organisations we consulted (both frontline and infrastructure) had undertaken dedicated work on performance improvement. Of those organisations, most had done some informal work on evaluation, strategy, quality and benchmarking. However, some organisations, generally the more established, had got more involved and used more sophisticated approaches.

We found that respondents were more likely to have undertaken work on evaluation and benchmarking than on strategy and quality. In terms of performance improvement tools, the main ones in use amongst our sample group were PQASSO (the Practical Quality Assurance System for Small Organisations) and internally developed systems used primarily to meet local authority service level agreements. These results differed slightly from some previous mapping exercises on performance improvement activity in the BME sector. For example, a study of 55 BME frontline organisations in Liverpool and Wirral[4] found that:

- Over half of the participants regularly reviewed their organisational aims.

- Basic performance management systems were in place for data collection (25%+ of sample) and for measuring trends (just under 50% of sample).

- The three top methods of performance measurement used by organisations were monitoring and evaluation, and baseline setting.

- 40% of organisations had adopted a quality assurance system.

It is worth emphasising, however, that variations between these earlier studies and our own were only slight. They may reflect regional differences in levels of performance improvement activity, although our interviews did not identify any significant regional variations in terms of performance improvement support provided by infrastructure organisations. Rather, the key message regarding performance improvement support that emerged is that frontline organisations may need it, but by and large they do not request it as a priority from support providers. This finding is further supported by a survey of voluntary sector skills carried out in East London in 2002, which identified the following support priorities amongst BME organisations:

Fundraising skills	60%
Financial management	41%
Management skills	41%
ICT usage	38%
Strategic and business planning skills	**24%**
Quality standards	**24%**
Supervision skills	22%
Personnel and people management	21%
Project management	18%

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[4] *Greater Merseyside Change Up Initial Infrastructure Investment Plan* (Liverpool, Greater Merseyside Consortium of Infrastructure Organisations, 2005)

Five years on, our own survey very much reflected these findings. Only 14 (28%) of the 50 frontline organisations we interviewed had received any form of performance support.

We found that frontline BME organisations often don't identify performance improvement as a priority because:

- They prioritise other issues – for example finding funding, physical infrastructure, professional development

  When we asked infrastructure organisations to describe the types of support BME frontline organisations request, the majority identified short-term objectives, such as: "help filling in applications for funding", "constitutional support", "help addressing human resource issues" and "support to manage and develop new services and projects".

- Some feel that the support offered by infrastructure organisations is not relevant to them

  One respondent explained: "We receive little support from infrastructure organisations, and these organisations often do not provide what we need. When we need support, infrastructure organisations refer us to recommended courses. But these can be a waste of time and a lot of the taught information is not required. These recommended courses need a certain amount of attendance and often frontline organisations are pushed to enrol onto courses that have little impact upon their work."

  When referring to developing a strategic plan, another interviewee said, "Our management committee devises our strategy. It is often felt that external agencies do not have the expertise to help us."

- Many see performance improvement as being more for 'regulatory and funding purposes' rather than a way to help achieve their own organisational aims

  In particular, respondents referred to the need to complete evaluations to meet funding bodies' needs. Amongst the responses we received were:
  - "The pressure to obtain funding ensures that these evaluations are completed."
  - "The organisation is hoping to remain available to [its] users for many years into the future. To achieve this we must do what funders ask us to."
  - "We must monitor and evaluate the organisation every six months… The main reason for carrying out this procedure is to keep funding from social services secure."
  - "Funders have different priorities. They require evaluation from the organisation seeking funding. This evaluation is carried out to keep funding coming. The evaluation can be beneficial for the association, but if there is not enough staff it can be an irritant to have to complete this monitoring for funders. We need to have more resources just to meet the requirements of some funders."

  In addition, a number of interviewees felt that the kinds of project monitoring required by funding bodies were out of step with the type of services they wanted to provide. For example, one said: "Funders want to

achieve certain goals and meet targets. This leads to the organisation losing its focus [in an effort] to meet funder needs and then gain future funding." Another said: "Funders don't often agree with our strategy of intervention. We will see people for as long as they need the service, whereas funders think it should only be three sessions. If we don't follow the targets they outline, we don't get some of the funding, but staff are so committed to the work that they are prepared to work for less."

One interviewee suggested that "the ability to judge the wider impact of our project on the community cannot be carried out by bigger organisations. Many of the questionnaires used to judge our performance are poor and are directed to gain specific answers that have already been predetermined by the interviewer."

Another interviewee felt that they did not always see the results of undertaking evaluation for funding bodies: "Evaluation has changed a lot since the introduction of Every Child Matters. Every session requires completion of a six-page feedback form. Even after completion, we don't always receive feedback from funders."

There can, then, be a marked difference between the kind of support that frontline organisations want and the support priorities identified by infrastructure organisations.

What performance support do BME organisations need?

Frontline organisations in our survey identified the following key issues on which they would value assistance (and which they did not feel was currently available from infrastructure organisations). Interspersed are some remarks made by interviewees, which elaborate on some of these issues:

Evaluation

- How to understand and measure the effect their organisations have on improving race equality conditions in their area and conditions for particular ethnic and/or faith groups.

- How to use qualitative and quantitative analysis methods (often required by funders on value for money, numbers of beneficiaries etc).

- Specific evaluation issues for campaigning and lobbying organisations. How to understand the impact of new thinking and ideas on other organisations' policies and practice.

Commenting on their need for greater support with evaluation issues, our interviewees said:

"Evaluation forms and feedback sheets are obtained from users, but no support [on interpreting data] is offered. We would like greater support because it will highlight areas of concern and allow us to manage the resources we receive to a better standard."

"A member of our management committee is currently responsible for monitoring and evaluation. This may sometimes result in a biased approach. We would like a more objective way of understanding the quality of the work we provide. External evaluators could help us to develop a different perspective [on] the impact of our work on the lives of BME people."

Strategy

- How to think about long-term planning while also worrying about day-to-day existence.

- How to maintain autonomy and accountability to local communities while also planning for organisational development and growth.

We found a number of BME organisations reluctant to review their organisational aims and objectives because they felt that this would compromise the relationships they had with, and the 'buy-in' they had received from, local communities. Some BME organisations indicated that they would like support to react to changes in community needs.

One interviewee made a comment which seemed to suggest that at least some organisations see strategic support as an erosion of their autonomy: "We have completed all strategies on our own. We do not need assistance."

Benchmarking

- How to collaborate with other BME organisations and learn from their practice and performance in an environment where competition between BME organisations – both for resources and for political influence – can be fierce.

Despite these competitive tensions, some of the comments made by interviewees suggest a latent demand for benchmarking support that could be tapped into, and some positive experiences that could be further developed:

"We work closely with race equality councils. It is very useful to work with these because of the nature of their work and it allows for the spread of ideas and experiences."

"[We] would also like more opportunity to network with other organisations so that they can find out how to improve what they are doing, especially around organisational processes and marketing."

"We haven't received any support on this, but this would be very useful, particularly to share best practice with other organisations and get an idea of innovative activities currently in operation."

"We feel that the building of links [with other BME organisations] could strengthen our organisation and allow for more security and sustainability."

Quality

- Advice and mentoring on how to implement quality assurance systems in organisations whose primary activities are lobbying and campaigning.

One interviewee commented:

"We have an established client base that expects particular things of us. It would be good to know how to show them that we are working on their behalf in the work that we do."

These growing concerns around meeting client expectations reflect and in some cases arise from the wider structural changes discussed in section 2.0.

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4.1   Take-up of infrastructure support by BME frontline organisations

Our interviews with 50 frontline organisations found that:

BME frontline organisations were more likely to seek support from public sector or generic third sector organisations than from BME third sector organisations.

42 BME frontline organisations answered the question: "Where would you seek support and guidance if needed?" Our interviews revealed the following results:

- Four organisations indicated that they would not seek support of any kind – either because they felt they had sufficient expertise in-house, or they were relatively new and were not yet aware of where support could be accessed.

- Of the 38 organisations that would seek support, most of them indicated more than one organisation. The breakdown was as follows:

Local authorities/other public sector	20
Other generic third sector organisations	15
Councils for voluntary service	12
BME third sector organisations	12

As these figures show, BME frontline organisations were most likely to seek support from public sector or generic third sector organisations. Many respondents indicated that their choice would depend largely on the kind of support they needed, or past experience of working with particular organisations. As one respondent put it, "We go to a range of organisations, it does not depend on if they are BME or not".

Only a minority, however, had received dedicated support on performance improvement compared to other types of support.

Thirty-eight BME frontline organisations answered the question: "Have you received any support particularly for performance improvement?" The responses can be summarised as follows:

- Twenty-four organisations had not received any form of performance support.

- Of the 14 organisations that had, four had received support on more than one issue. The support received breaks down as follows:

Strategy	7
Benchmarking	6
Evaluation	3
Quality	2

While two respondents referred to using resources published by major third sector providers, such as the National Council for Voluntary Organisations (NCVO), they also noted the lack of personal one-to-one support that could back up and help utilise this learning. One said: "We sometimes receive publications from NCVO, but there is little personal contact from larger voluntary organisations. Anyway, I feel there are people in [my] organisation who are well equipped to deal with this."

Below is a summary of the way interviewees in our sample referred to their experiences of support in relation to the four key areas of performance improvement – strategy, evaluation, quality and benchmarking:

Strategy

This was the most common form of support received, with assistance focused primarily on the development of business plans or strategic plans.

Evaluation

Few organisations had received support regarding evaluation. Many felt support was not needed, as external evaluators were often provided by their funding agencies, monitoring against externally determined targets. As one organisation put it: "We do not normally receive help with this as it is the local council who carry out monitoring reviews of the services we provide against the targets which they set."

Quality

Only two respondents had received support specifically to do with quality assurance. These organisations had been supported to implement the PQASSO quality system. This support was very favourably received, however. One respondent said: "The PQASSO system is currently being introduced with the help of our local CVS and external consultants. Without the assistance of these external helpers it would have been very difficult to implement this system. We lacked the capacity and skills to be able to do it."

Benchmarking

Our research identified six organisations which were or had been involved in benchmarking partnerships. While respondents seem to value the peer-to-peer learning and support inherent in effective benchmarking partnerships, only one organisation indicated that they had received formal, external support with the process. One respondent explained, "Although it is difficult to find another organisation we can benchmark ourselves against, we adopt an informal type of benchmarking. Through connections with other organisations, knowledge is passed and shared. Through word of mouth and networks, we learn more about the sector. The organisation we received support from helped immensely in achieving that."

Perceptions of infrastructure organisations

A small selection of BME frontline organisations that we spoke to expressed concerns that infrastructure organisations are remote from local communities and do not take their needs into account.

There was a feeling amongst a minority of interviewees that infrastructure organisations only work with them to further their own interests. For example, one said, "Organisations that do work with us often do so purely to 'tick the box'."

One interviewee referred to competition between BME organisations, suggesting that this limits not only the opportunities for collaborative working between BME infrastructure organisations but also the extent of the interaction they have with BME frontline organisations: "We have little contact with other BME organisations. Many are too paranoid to share their ideas and resources. Many are worried about competition for funding."

Another interviewee suggested that "larger voluntary organisations need to better understand the needs of refugees and asylum seekers. They require better mainstreaming to incorporate service provision for refugees and asylum seekers."

The issue of competition between third sector organisations was also seen by some to be a particular problem for BME organisations: "Larger third sector organisations tend to widen their remit to cover a wider area. This often invades the work already being conducted by smaller organisations, like BME organisations."

Another interviewee went further than this: "Larger voluntary organisations can be a hindrance to our work because they cause duplication of work being carried out by us and other frontline organisations. This causes competition between organisations. We have seen a divide and rule approach in this sense."

Other interviewees recognised that a lack of resources and skills amongst BME infrastructure organisations can lead to frontline organisations not using them for support: "Little support is gained from other BME organisations because we feel they do not possess the resources to deliver the assistance we need. However, we would like it if BME organisations could provide us with the kind of technical assistance that we need – IT, completing business plans, evaluation."

However, some of the organisations that felt infrastructure organisations couldn't help them were actually unaware of the types of support provided. "We're not sure if generic infrastructure organisations are in a position to help us because we don't know the types of work they do."

4.2 The role of infrastructure organisations in supporting performance

Our discussions with BME organisations highlighted the skills and competencies they felt development workers in both BME and 'generic' infrastructure organisations should possess. Many of these skills can be applied across the board to organisations supporting a diverse range of organisations. They included:-

- Being positive about performance: helping organisations think about the opportunities available to improve what they do, rather than approaching their performance as a problem to be fixed.
- Supporting organisations to lead and own the process of improving their own performance.
- Following up with beneficiaries after they had received performance support to review progress.
- Treating everybody equally with respect.
- Communicating in an open and accessible way.

It is evident from our research and wider analysis that infrastructure support, particularly on performance improvement, needs to take greater account of the wider structural changes currently reshaping the BME sector if it is to be relevant to BME frontline organisations. In particular:

- Infrastructure organisations, both generic and BME, will need to develop and extend their understanding of the wider structural and political forces that are reshaping the sector and especially the consequences of these changes for BME organisations. Specifically, performance support will need to take a much broader, 'whole environment' outlook if it is to address these wider challenges.

- Performance improvement support will need to be approached as part of a co-ordinated strategy which is also able to address organisations' need for both developmental support and specialist expertise in areas such as funding and financial management and planning, human resources, and optimising ICT usage.

- The perception that performance improvement support is primarily for meeting funding and regulatory requirements will need to be challenged.

It is also evident that much greater clarity is still required regarding what infrastructure organisations can provide to BME frontline organisations and how such support can be accessed. The infrastructure offer is still far from clear in many respects.

Many BME frontline organisations play a triple role – as service deliverers, civic engagers and lobbyists – and infrastructure organisations need to configure support so that it addresses each of these functions.

There is a strong case to be made that infrastructure support should also help BME frontline organisations achieve their race equality aims. This will involve developing the skills of infrastructure organisations to interpret equality trends, analyse equality interventions and challenge all frontline organisations to develop better equality practice. This is particularly important when advising on strategy and measuring performance.

BME-led infrastructure organisations versus 'generic' infrastructure organisations

We found no indication that BME frontline organisations are necessarily more likely to approach infrastructure support organisations with which they share an 'ethnic affinity'. Ethnicity does not appear to play a particularly strong role in determining which infrastructure providers frontline organisations will seek support from. Indeed, they seem more motivated by playing to the strengths of particular organisations – i.e. approaching an organisation because it has a good reputation for delivering support in a particular area, such as HR training or strategic planning.

However, there is undoubtedly significant competition between infrastructure organisations themselves. Some BME infrastructure organisations have not necessarily developed the required competencies or confidence which will secure their credibility with BME frontline organisations. Consequently, some 'non-BME' infrastructure organisations are seen to be competing with BME infrastructure organisations for the same clients – i.e. BME frontline organisations. Some BME infrastructure organisations may also require support to develop their skills and expertise so that they can devise appropriate service packages for which there is demand. This would help BME infrastructure organisations to carve a niche in the performance improvement support market, but with a more solid rationale. BME infrastructure organisations must be able to demonstrate value deriving from their skills rather than from some notional credibility bestowed by being a BME organisation.

It should also be noted that many frontline organisations, both BME and 'non-BME', regard themselves as competing with infrastructure organisations for resources and this can sometimes brings an adversarial dimension to relationships between infrastructure and frontline organisations.

5.0 The Research Findings: Phase two – Learning from case studies

Phase one of the project helped us to understand what types of performance improvement approaches BME frontline organisations tend to use, where such organisations look for performance support, and the types of support they tend to ask for.

But as we explained in section 2.0, our more in-depth interviews also identified a range of factors which play a significant part in determining the extent to which performance improvement is seen as relevant to – and capable of addressing – the real-life developmental issues the BME sector is facing. As a means of exploring these issues it was decided that we should grant-support a limited number of performance improvement projects with BME frontline organisations as a form of action learning. These three-month grants were intended to provide space and resources for organisations to reflect on a range of performance issues and to act on them.

While applicants were free to design and submit their own proposals, we emphasised that we were particularly interested in projects or initiatives which would help shed light on the following issues:

- Thinking ahead and planning for the future

    What challenges do BME organisations face in developing strategy? What influences the development of strategy?

- Improving performance and working towards equality

    How helpful are the targets and outcomes associated with performance improvement approaches that funders often require? Can links be established between performance improvement and race equality outcomes? Is there anything distinctive that a BME organisation should bear in mind in the process of reflecting on their performance?

- Collaborating to support performance

    How can infrastructure organisations collaborate to better support the performance needs of BME organisations? What are the barriers and challenges faced by infrastructure organisations when providing performance support to BME frontline organisations?

    In this section we describe the experiences of our five case study organisations and the projects they undertook to improve their own performance, or to improve performance support for BME frontline organisations.

For each case study, we outline who the organisation was, what they did and what they achieved. The overall learning points from each of the three grants are drawn together at the end of each set of case studies.

5.1 Case studies: 'Thinking ahead and planning for the future'

BME organisations face some distinct challenges when developing strategy for their organisations. They are often pulled in different directions by the needs of their service users and local communities, and by the requirements and targets of their funders or purchasers. Often BME third sector organisations are asked to be a number of different things at the same time – such as service deliverers and lobbyists for local communities, as well as engagers of those communities. These factors are a part of the distinct legacy of British race relations and BME organisations face real challenges in balancing and resolving all of these competing priorities. This makes it much harder for BME organisations to develop strategies and plans that work for their organisation in the long term.

The two organisations that received this grant undertook activities to think through how they might use performance support to resolve some of these issues and develop better ways of planning what their organisation does.

The two organisations involved in this grant were Escape Artists (London) and the Black Health Agency (Manchester).

Case Study 1: Black Health Agency

Who they are

The Black Health Agency (BHA), a voluntary organisation operating in Manchester since 1990, aims to improve the lives and health of BME and other marginalised communities. BHA manages 18 Patient and Public Involvement Forums in Greater Manchester and Lancashire and provides a wide range of health-related initiatives and services, locally, regionally and nationally. BHA has developed significantly and now employs over 70 staff supporting a range of projects, including:

- African Aids Helpline: a free, confidential, multilingual service for Africans living in England
- Arise HIV Support Services: support and welfare advice for BME communities living in Greater Manchester
- Routes Project: support for families with children aged five to 13, newly arrived in the UK and living in Manchester, many from refugee and asylum-seeking communities
- Young Black Perspectives: a peer education project targeting young black men and women in Greater Manchester and the issues that affect their lives, such as sexual health, parenting, drugs and alcohol, self-esteem, training and employment.

What they did

As a starting point for the ongoing process of developing service standards and a considered approach to developing strategy across the organisations, BHA chose to adopt PQASSO, a quality assurance system written specifically for voluntary organisations. The grant was used to help BHA get a better picture of what would need to be done in order to achieve the standard. BHA felt that adopting a quality system like PQASSO would help them respond to the regulatory requirements of funding bodies, allow them to provide more robust evidence regarding service user needs and, where necessary, challenge funding bodies' views about the most appropriate use of resources.

They approached this work in the following way:

- BHA hired a consultant to review three of BHA's projects – 'Arise HIV', 'Routes' and 'Young Black Perspectives'. The consultant interviewed managers and officers within each of the three projects. The aim of the review was to help the organisation identify areas where its work was in line with the criteria laid out in PQASSO and where further work would be needed.
- The consultant and a project co-ordinator then developed an implementation plan for each of the three projects, identifying the changes they would need to make in order to fit with the criteria.
- After the end of this grant-funded project, BHA planned to extend the work to other projects in BHA to achieve PQASSO Level 1 across the whole organisation.

What they achieved

The initial audit identified key areas for further work. For example, BHA identified the need to collect service user comments in a more systematic way and a co-ordinated database for recording service users' views, needs and comments across projects was established.

Using PQASSO helped BHA to improve their performance in a number of ways. For example, the development of a more robust monitoring system for the Routes project helped to support inter-agency referrals. In this way, refugee and asylum seeker users of the service were more likely to be referred to other agencies (such as local GPs) if Routes project workers found that they had not already signed up to receive health care.

Using PQASSO also helped the organisation to think more strategically about how to best meet clients' needs. Staff were able to assess and compare projects and thus identify areas where more resources and/or support were needed. One BHA member explained, "As funders move towards more of a commissioning approach, quality systems like this can help us to say, 'This is a gap we've seen in the community, we've got evidence to prove it and there are services that we can offer to address it.'"

However, the organisation still sees a tension in balancing funders and commissioners' purchasing priorities with the kind of service delivery initiatives it most wants to develop. Funding bodies will often take a narrow view, for example, when the organisation would ideally adopt a much more holistic approach. This is the case with teenage pregnancy. Teenage pregnancy figures are rising in a number of Manchester's wards but there is still pressure from funding bodies to undertake work focused solely on the reduction of teenage pregnancies rather than addressing the broader causes.

BHA believes that using a quality framework to tighten up their monitoring and evaluation will help to better position the organisation in the longer term. Smarter monitoring and evaluation will give the kind of information it needs in order to monitor potential gaps in statutory agencies' services. It also helped the organisation to assess internal service improvements which may be needed in order to meet the needs of local BME communities.

BHA recognised that gathering more sophisticated evidence about community needs would help them avoid duplicating work being carried out by others in their area. In this way their chosen quality framework has helped them think more strategically

about their key areas of work. As one staff member explained: "We need to be sure that we're not just lobbying for what we need as an organisation, because we exist to lobby on behalf of the organisations we work with. There is a danger that we only focus on things that we are interested in. The big issue for us is identifying what we shouldn't be focusing on. Often we don't take things up because we know somebody else is doing work around it. For example, young black men are more likely to go in to mental health services, but other organisations exist and are doing good work around this – so we haven't got into it."

Case Study 2: Escape Artists

Who they are

Founded in 1996, Escape Artists is an arts education charity based in the South East region. Initially, the organisation's main aim was to prevent re-offending, by creating opportunities for offenders to participate in arts-based activities, but over the last 11 years the organisation has broadened its work and now offers a range of services to groups that experience social exclusion, including prisoners, ex-prisoners, young offenders, young people at risk, homeless people, people in hospice care and people with mental health problems. The key services it provides include accredited courses, educational productions, research and training. "What we are interested in is social inclusion," the organisation explains, "and race equality lies within it, but it isn't the defining framework in which we function."

What they did

Escape Artists chose to use its grant to invest in two areas of performance improvement.

Firstly, they wanted to improve their monitoring processes by developing an online information management system that would enable funders, clients and other stakeholders to access detailed information about their work through an open access website. They felt this resource would not only help staff understand and measure the outcomes of their work, but would also help the organisation improve transparency in relation to all of its stakeholders, especially funding bodies.

Secondly, the organisation wanted to develop their strategy by creating a new policy for working with BME communities. In particular this policy would be used to help them define their approach to delivering services for BME communities, the outcomes they intend to achieve from this work and how to best involve BME communities in shaping the future work of the organisation.

What they achieved

After some initial challenges around staff time, the online information management system was created. Staff could use the online system to access their own project information, such as contracts, monitoring reports, and user feedback and to form an overview of the nature and progress of each other's projects. Staff are required to log-on to access or update any project information, in order to ensure a full record of online usage and to encourage all staff members to use the system.

The new facility has already delivered benefits for the organisation, as has sharing this information with other stakeholders. As more staff members now have a better idea of the scope and focus of the organisation's projects as a whole, the facility has also helped to improve the organisation's strategic planning. Using remote access to check and update records has allowed staff to work more flexibly too.

The website also functions as the organisation's internal information management system and is used by all staff. The site has varying levels of access and funders and purchasers are encouraged to access the site to see at first-hand what the organisation is capable of. "What we explain to funders," says the organisation, "is that we have set our own performance parameters. We say, please benchmark these and see whether they are good enough for you. We are confident that they will be."

Escape Artists also produced a policy for delivering services to people from BME backgrounds. This helped the organisation consider how it could best support excluded groups who have not always been able to access their services, and created an opportunity to reconsider its BME engagement strategies and to develop feedback mechanisms to assist with service improvements. In practice, this meant producing more robust ethnic monitoring processes for customer feedback, making sure that feedback was fed into the development of equality policy and practice. Escape Artists are preparing for the future challenges associated with implementing the service improvement policy – in particular, the difficulties of finding or developing people with the ability to work with diverse BME communities while also promoting race equality.

5.1.1 Learning points from the 'Thinking ahead and planning for the future' grants

By learning from the experience of the two organisations involved in these case studies, we aimed to find out more about how performance improvement can help to address the following key issues in BME frontline organisations:

- Managing the pressures associated with the competing needs and requirements of service users and funding bodies.
- Dealing with the challenges of being service deliverers, lobbyist and civic engagers within the context of British race relations policy.

Managing the pressures associated with the competing needs and requirements of service users and funding bodies

Escape Artists sought to manage the competing needs and requirements of service users and funding bodies by producing an online information management system that can be accessed by service users, staff and funding bodies alike. Escape Artists saw this as a pragmatic response to developing and sharing details of project outcomes that would help all of its stakeholders assess and better understand the effectiveness of the organisation's work. The organisation also recognised that its work should be more transparent to its stakeholders and hoped that producing the online information system would also help develop longer-term funding relationships.

BHA now faces the challenge of finding the time to roll out PQASSO across the whole organisation. One BHA staff member said, "Given the pressures we are under to deliver, thinking strategically about what needs to be done and sticking your head up above the water from project work can feel like an extravagance."

Dealing with the challenges of being service deliverers and lobbyists within the context of British race relations policy

BME organisations have a number of competing demands placed on them: local communities frequently want them to lobby on their behalf, while funders and purchasers are primarily concerned with diversifying the delivery of public services. Many BME organisations find it extremely difficult to undertake diverse lobbying activities while also focusing time, skills and resources on service delivery, which is the primary source of their revenue.

Of the two organisations involved in this grant, BHA was the only one involved in both service delivery and lobbying on race equality issues, sometimes on behalf of

other BME organisations that they work with. We saw that a quality framework helped BHA to develop both areas of its work simultaneously. For example, monitoring service user feedback helped BHA to improve its service delivery strategy for its own internal projects, and also helped them to identify some of the gaps in statutory service provision which lie outside of their own service delivery remit. In these instances, BHA planned to use its fresh evidence of community need to lobby statutory agencies and policy makers as a route to improving statutory sector provision.

5.2   Case studies: 'Improving performance and working towards equality'

In the first phase of this project we found that some BME third sector organisations saw performance improvement as something organisations do to meet funders' requirements, rather than something of real benefit to their organisation. Yet BME third sector organisations are increasingly being asked to deliver public services and to show how what they do is adding value and making an impact.

The two successful applicants for this grant used performance improvement tools in order to find out whether these tools were appropriate for the work that they do, and whether the tools helped them to progress race equality with the people that they work with.

The two organisations involved in this grant were Wai Yin Women's Society (Manchester) and the Yemeni Economic and Training Centre (Sheffield).

Case Study 3: Wai Yin Women's Society

Who they are

Wai Yin Chinese Women's Society is a registered charity led by a volunteer management committee made up of Chinese women from across Greater Manchester. Its mission is to provide essential, quality services to the Chinese community. It has been providing services to assist the North West's Chinese population since 1988 and is one of the largest Chinese community centres in the UK, helping approximately 800 service users every week. It employs approximately 35 full-time and part-time staff and over 30 sessional and contract-based staff. Its current service projects include:

- free educational courses for adults
- an enterprise training programme for women starting up in business
- a Women and Parenting project offering English language classes and support
- a youth project which helps young people gain self-confidence, negotiate issues of identity and use their skills to serve their community.

A manager at Wai Yin described the challenge of making performance improvement meaningful and helpful: "Performance indicators, target setting, monitoring, evaluation and stakeholder engagement are all time-consuming processes squeezed into our already demanding roles. It is a challenge for us to manage this strategically rather than to be reacting to external agendas."

What they did

Wai Yin started off as a small organisation, but its recent development and success in securing contracts from mainstream funders has brought with it additional pressures. Recently the organisation secured four new contracts from large statutory agencies and this involves them leading a partnership of BME delivery organisations providing training and employment services to unemployed people, BME businesses, people employed in the ethnic employment sector and would-be BME entrepreneurs.

With this in mind, they aimed to use the grant to:

- achieve the Matrix quality standard[5] by January 2007;
- strengthen the organisation's financial processes and its internal 'health checks' (especially regarding cash-flow) and its financial management procedures and controls;
- develop performance management systems for their contract partners; and
- investigate implementing a computer-based management information system which would help them track the progress and achievements of all their service uses and volunteers across the organisation.

What was achieved

Rapid growth has been both a tremendous achievement and a real challenge for the organisation, requiring it to investigate and implement appropriate quality assurance processes, financial systems and management information systems more or less simultaneously.

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[5] the specialist quality framework for providers of information, advice, guidance and learning

An appropriate Matrix specialist consultant was identified and hired to assist them in meeting the standard. At the time of writing the organisation was on course to gain the standard by May 2007. The planning and joint working required by the Matrix process has helped inform the organisation's strategy and has created a framework for its quality improvement, providing a shared sense of direction and guidance on what needs to be done.

Financial management systems were reviewed and a performance management system for the contract partnership established.

An appropriate computer-based management information system has been identified which will meet the organisation's needs.

Case Study 4: Yemeni Economic And Training Centre

Who they are

The Yemeni Economic and Training Centre (YETC) in Attercliffe Common in Sheffield was set up in 1992 and offers asylum-seekers and refugees access to IT and basic skills courses. It also provides family support groups, a carers' project and entry-level qualifications in English. Its activities revolve around three main projects:

- a Family Support Project, meeting the needs of Yemeni families in the community
- a Carers Project, established to meet the needs of Yemeni carers who do not access or are not receiving other provision
- Tessa – a technical advice service, set up to deliver technical support and advice to third sector organisations.

What they did

YETC chose to use the grant to run an action learning set that would explore which performance improvement model would best fit the organisation's operational and cultural needs and gauge what support might be required in order to embed the system within the organisation.

YETC were keen to identify a performance improvement approach that would meet potential funding bodies' needs, but it was also important that any approach they did adopt would also help the organisation re-evaluate its service delivery and improve race equality outcomes for the people it works with.

What was achieved

An action learning set comprising managers from a range of BME organisations was established in order to examine their own organisation's strategy and planning and to share this learning with others. Workshop sessions were held to identify potential barriers to improving performance and explore how performance improvement systems might improve race equality outcomes.

YETC really valued the opportunity to speak to other BME organisations working in their local area through the action learning set. The discussions helped YETC to strengthen its support networks and to learn from others' experience of using performance improvement tools.

As a result of those discussions, YETC felt that quality assurance would be a useful approach to improving the performance of the organisation. In particular, they

valued the potential of a quality framework to act as 'an organisational health check', believing that this could help identify changes that need to be made in how the organisation operates. The organisation found assessing the quality of their systems and processes to be a generally positive experience: "It is a critical first step for us – to see what we need, and what we want to come out at the other end… we are learning the language of performance improvement but creating our own."

YETC now recognises the importance of performance improvement but also acknowledges that an entire organisational culture cannot be transformed by quality standards alone – organisational change is a longer-term process. As one staff member explained, "It is very hard to change old habits. There is a lot of learning to go on. It is not a simple transition."

YETC also found that using a quality framework helped them gain a degree of independence from funders, in that the organisation became less preoccupied with pleasing funders and increasingly interested in improving its own performance. As a result of using this quality assurance system, YETC is now arranging an annual operational plan to achieve its own internal targets in addition to those of its funders and purchasers.

5.2.1 Learning points from the 'Improving performance and working towards equality' grants

By learning from the experience of the two organisations involved in these case studies, we aimed to find out more about how performance improvement approaches can help organisations to improve race equality outcomes for their service users.

In practice, we found it impossible to successfully interrogate whether or not organisations' performance improvement processes could be said to help deliver race equality benefits within local communities – i.e. within the client groups served. There were a number of reasons for this:

• Firstly, such an analysis is methodologically difficult and needs more than anecdotal evidence.

• Secondly, even gathering anecdotal evidence requires participants to think about and reflect on performance improvement from a quite different perspective. In our interviews and discussion groups we tried a variety of ways to broach this subject but none were successful.

• Thirdly, participating organisations were reluctant to extend either the time they were devoting to the project or the staff involved. Whether having more time available for reflection or involving additional staff in this process of reflection would have helped is very hard to say. It is difficult to assess to what extent performance improvement activity is or is not responsible for any tangible gains in wider community race equality.

That being said, our interviews with YETC and Wai Yin did reveal some useful learning points for organisations that are considering adopting performance improvement approaches in their organisation.

Firstly, Wai Yin found it difficult to identify an appropriately skilled consultant, due to a lack of knowledge of the marketplace. Many third sector organisations looking

for external support have the same problem and would value advice and guidance to help them navigate the marketplace and find reputable providers.

Secondly, YETC found that help and support in identifying the right performance improvement model was key to success in implementing it. It is vital not to choose an inappropriate model simply in a 'desperate attempt to please funders'.

5.3   Case study: 'Collaborating to support performance'

In the first phase of this project we found that infrastructure organisations that support BME frontline organisations are not always confident they understand the environment in which those organisations operate. In some cases this hinders the relationship between the infrastructure organisation and those they are trying to support. In addition, we did not find many examples of specialist BME and 'generic' infrastructure organisations working together to help BME frontline organisations.

The three organisations that won this grant undertook joint work to strengthen their performance improvement support for BME third sector organisations. This was a chance for those organisations to think about how they will market and deliver performance improvement support in the future. It also allowed them to consider ways of improving their working relationship and sharing ideas to support each other and BME third sector organisations.

The three organisations involved in this grant were the Consortia of Ethnic Minorities (COEMO), Action for Black Community Development (ABCD) and Bradford Community and Voluntary Services (BCVS), all based in Bradford.

Case Study 5: Consortia Of Ethnic Minority Organisations Action For Black Community Development and Bradford Community And Voluntary Services

Who they are

This project involved three organisations working in partnership with each other:

Consortia of Ethnic Minority Organisations (COEMO)

COEMO is a representative umbrella organisation for the BME voluntary sector. It works to raise the profile of BME organisations, offers support, organises networking and consultation events, undertakes research and acts as an advocate for the BME voluntary and community sector (VCS) and the wider community with local and central government and other relevant institutions. COEMO represents the BME VCS on local, regional and national decision-making bodies.

Action for Black Community Development (ABCD)

ABCD is the main umbrella organisation in the Bradford district for the African and African-Caribbean community. ABCD works to support, capacity build and increase the influence of BME community organisations.

Bradford Community and Voluntary Services (BCVS)

BCVS promotes and develops voluntary activity both through organisations and individuals, facilitates partnerships between voluntary and statutory agencies, enabling groups to influence policy makers, and provides practical services, advice and support to voluntary groups. BCVS has five core areas of activity covering: development, support, liaison, representation and strategic partnership.

What they did

The partners recognised the need to address two key issues. Firstly, infrastructure organisations supporting BME frontline organisations were not always confident they understood the environment within which those organisations operated. Secondly, there weren't many examples of BME and 'generic' infrastructure organisations working together to help BME frontline organisations.

The project was designed to address these challenges through three actions. They worked jointly on these but with one partner taking the lead on each:

- Networking event for infrastructure organisations and BME frontline organisations to come together and discuss how to improve performance support for BME frontline organisations.

- Development workers event for infrastructure aimed at sharing good practice and raising issues of common concern, assessing current skills and knowledge, finding out more about the available training and support for development workers, and enabling the provision of more effective support to BME frontline organisations.

- Infrastructure away day at which infrastructure support organisations could get together to develop strategy to improve performance support for BME

frontline organisations.

What they achieved

Networking event

Forty-two groups attended the Networking Event. Overall feedback suggests the event was very useful for frontline and infrastructure organisations alike. It provided infrastructure organisations with valuable feedback on issues of accessibility, the usefulness and relevance of performance support, and the types of performance support needed. The event identified that start-up support is good, but that follow-up and longer-term support requires improvement.

Development workers event

Sixteen development workers from generic and BME infrastructure organisations attended this event. Participants valued the opportunity to discuss the particular skills needed to work with BME frontline organisations and to identify related training needs. The group also identified skills that should be common to both BME and generic infrastructure development workers, including: good communication and marketing skills to reach excluded BME groups; flexibility to develop tailor-made development services that aren't too formal; the ability to gain the trust of BME organisations by involving them in the design and evaluation of services; counselling skills when dealing with people that have undergone emotional upheaval or extreme deprivation (such as some refugee and asylum seeker clients); and strong partnership development skills.

The event highlighted the need to develop regular networking opportunities for infrastructure development workers and those working in BME frontline organisations.

Infrastructure away day

The Infrastructure Away Day was attended by 12 Chief Executive Officers and senior managers from infrastructure organisations. The group identified a number of potential barriers to accessing performance support. For example, two of the largest BME infrastructure organisations in the area felt disproportionate pressure to meet the needs of other BME voluntary organisations. Infrastructure organisations in the district sometimes duplicated provision due to poor communication between them. The group also developed some principles by which infrastructure organisations should work to in the future to improve performance support for BME frontline organisations.

5.3.1 Learning points from the 'Collaborating to support performance' grant

By learning from the experience of the three organisations involved in this case study, we aimed to find out more about how infrastructure organisations can improve their working relationship and support each other to improve the provision of performance improvement support for BME frontline organisations.

The case study illustrates the benefits of generic and BME infrastructure organisations working together to improve performance support for BME organisations. Having the opportunity to come together and discuss the issues led

to the groups identifying common skills for development workers and common principles to work to.

However, there are still some challenges to be overcome. For example:

- There is still a need to clarify what constitutes a 'BME specialism' and whether there are performance improvement issues that are unique to BME organisations.

- While some BME infrastructure organisations want to carve a niche for themselves in providing support for particular BME communities, increasingly they are competing with generic infrastructure organisations which may have more resources or in some cases may be better placed to deliver that support.

Four main challenges were identified to improving access to performance support amongst BME frontline organisations:

- Lack of clarity amongst BME frontline organisations about what infrastructure organisations can provide and to access that support.

- Associated lack of knowledge between infrastructure organisations about what each offers to BME frontline organisations and where the gaps are.

- Too many BME frontline organisations perceive performance improvement as lacking importance in relationship to their work.

- A lack of skills and knowledge amongst infrastructure organisations of the real issues and problems facing BME organisations.

6.0 Learning and Analysis

In this section, we summarise the key learning from our research. We then highlight some broader issues that are important to consider for the future.

If there is one key message that should be emphasised it is that performance improvement support must reflect and respond to the wider structural change currently reshaping the third sector, as outlined in section 2.0.

Many BME third sector organisations will need additional support and resources to reposition themselves successfully in this changing marketplace. Performance improvement approaches, in particular strategy and monitoring and evaluation can help organisations adapt and survive in this changing environment, and demonstrate their added value to funding bodies, service users and competitors alike.

6.1 Phase one research

Phase 1 research examined the extent of performance improvement activity amongst BME frontline organisations, what support they need and what support is offered to them. We also looked at some of the barriers to BME organisations engaging in performance improvement.

The findings from phase 1 desk-based research and telephone interviews are summarised below:

Engagement with performance improvement

Only a minority of the BME organisations we consulted – both frontline and infrastructure organisations – had undertaken dedicated work on performance improvement activity.

What support are BME organisations receiving?

Just over a quarter (28%) of the frontline organisations we interviewed had received any form of performance support.

The most common form of support received was help with developing business plans or strategic plans. Few organisations had received support regarding evaluation. Many didn't feel they needed support as their funders often provided external evaluators.

Only two respondents had received support specifically on quality assurance and these organisations had been supported to implement the PQASSO quality system.

We identified six organisations which were or had been involved in benchmarking partnerships. While respondents seem to value the peer-to-peer learning and support inherent in effective benchmarking partnerships, only one organisation indicated that they had received formal, external support with the process of benchmarking.

What kind of support do they need?

While frontline organisations may need performance improvement support, they rarely identify this need themselves, and rarely ask infrastructure organisations for help with it (see section 4.0).

Frontline organisations often prioritise other issues, such as identifying funding sources, physical infrastructure, and professional development. This is borne out by the kind of support infrastructure organisations say they are most frequently asked for by BME frontline organisations. These cover: 'help filling in applications for funding', 'constitutional support', 'help addressing human resource issues' and 'support to manage and develop new services and projects'.

However, below we summarise the kinds of support frontline organisations told us they needed with performance improvement. Most believed that support in these areas is not currently available from infrastructure organisations:

- *Evaluation*

    o How to understand and measure the effect an organisation is having on improving race equality conditions in its area (and conditions for particular ethnic and/or faith groups).

    o How to use qualitative and quantitative analysis methods (often required by funders on value for money, outcomes, beneficiaries etc).

    o Specific evaluation issues for campaigning and lobbying organisations. How to understand the impact of new thinking and ideas on other organisations' policies and practice.

- *Strategy*

    o How to think about long-term planning while also worrying about day-to-day existence.

    o How to maintain autonomy and accountability to local communities while also planning for organisational development and growth.

    o How to react to changes in community needs.

- *Benchmarking*

    o How to collaborate with other BME organisations and learn from their practice and performance in an environment where competition between BME organisations can be fierce.

- *Quality*

    o Advice and mentoring on how to implement quality assurance systems in organisations whose primary activities are lobbying and campaigning.

Where do they get their support from?

Our research revealed that BME frontline organisations are more likely to seek support from public sector or generic third sector organisations than they are from BME third sector organisations. This suggests that for many frontline organisations their choice of support provider is determined more by factors of availability, expertise and reputation than it is ethnicity of the provider. A lack of resources and skills amongst BME infrastructure organisations can influence frontline organisations' decision not to use them for support.

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What are the barriers to engaging in performance improvement/seeking support?

There remains a widespread perception amongst frontline organisations that performance improvement is primarily about fulfilling regulatory and funding requirements rather than achieving their own organisational aims.

Some BME frontline organisations are concerned that infrastructure organisations are remote from local communities and do not take their needs into account. A minority are skeptical of infrastructure organisations and believe their primary concern is furthering their own interests.

Competition between organisations is a serious concern and has the potential to limit not only the opportunities for BME infrastructure organisations working together but also the extent of the interaction they have with BME frontline organisations.

While BME frontline and infrastructure organisations may have some performance improvement needs that are different from those of 'non-BME' organisations, these do not arise specifically because of the ethnicity of these organisations, their staff or client base. Rather, they arise from the specific developmental circumstances many BME organisations find themselves in and in particular the wider context explained at 2.0.

6.2   Phase two research

6.2.1 Summary of learning from the case studies

Taken together, the five case study organisations helped us to identify a number of key challenges facing BME organisations using performance improvement techniques. Our summary applies to BME frontline organisations, infrastructure organisations, and funders and/or commissioners:

Lack of resources to improve performance

Many organisations, especially BME organisations, feel they lack the time, skills and resources to invest in improving their performance.

Negative perceptions of performance improvement

Some BME organisations expressed a desire to 'opt out' of, or resist, what they perceive to be public sector pressure to measure, assess and evidence third sector performance. They see performance improvement as a public sector or funder agenda and feel that they can maintain their independence and distinctiveness by not engaging with it.

There is a risk, especially for smaller BME organisations, that opting-out of performance improvement becomes a vicious circle, with these organisations able to operate only on the margins of the sector because they are unable to plan for the future, track their progress, demonstrate their value or share their learning with other organisations.

Relevance of performance improvement tools

A number of organisations identified a mismatch between the nature of their work with BME communities and the ways of measuring the effect of that work prevalent in most monitoring and quality assurance systems. Developing and using

appropriate outcome-focused methodologies remains a critical issue for the whole of the third sector, not just BME organisations.

Negotiating outcomes and deciding how outcomes are best evaluated

Resources to address issues of race equality are often distributed in a short-term way, in response to particular pressures and events and as a consequence frequently do not always result in sustainable investment or longer-term change. BME organisations have a very important role to play in lobbying for more sustainable change.

Organisations, along with their funders and commissioners, need to develop working relationships which enable open and honest discussion of the reasons for funding particular initiatives, a due consideration of the available evidence, and a more collaborative approach to identifying the best ways to deliver and monitor the effectiveness of initiatives.

Test it before you do it

The case studies illustrate a strong case for BME organisations (indeed, any organisations) to test out performance improvement approaches on a limited number of projects or services before attempting to roll out the system fully across the whole organisation. A small-scale 'pilot' to find out the pros and cons of an approach can be extremely useful in helping organisations understand the distance that needs to be travelled. It can also help organisations understand the implications of applying the tool to a range of projects with different characteristics.

Changing organisational culture

The participants recognised the importance of performance improvement approaches, but found that it often involved a change to the culture of the organisation, and was therefore not something that could be achieved overnight. Changing the culture of an organisation and building the skills of staff to improve performance is a long-term process. The benefits may be powerful, but the investment can also be significant.

6.2.2 Learning from each individual small grant programme

This section outlines the more detailed learning from each type of grant.

Thinking ahead and planning for the future

BME frontline organisations need to be able to reconcile the pressures associated with the competing needs and requirements of service users and funding bodies. Strategic planning can help with this but many organisations do not appreciate that, and so need help understanding the potential benefits.

Many BME organisations find it difficult to set aside the time, skills and resources to embed performance improvement approaches into the organisation as a whole. This is the main barrier to wider take-up of performance improvement and, whilst not specific to BME organisations, may be felt more acutely by them.

BME organisations have a number of competing demands placed on them: local communities frequently want them to lobby on their behalf, whilst funders and purchasers are primarily concerned with diversifying the delivery of public services. Many BME organisations find it extremely difficult to balance lobbying activities with

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service delivery. Both of our case study organisations found that performance improvement approaches could assist in this by offering improved service user feedback and a more robust evidence base.

Improving performance and working towards equality

In practice, we found it impossible to successfully interrogate whether or not organisations' performance improvement processes could be said to help deliver race equality benefits within local communities.

YETC found that help and support in identifying the right performance improvement model was key to success in implementing it. It is vital not to choose an inappropriate model simply in a 'desperate attempt to please funders'.

Collaborating to support performance

Four main challenges were identified to improving access to performance support amongst BME frontline organisations:

- Lack of clarity amongst BME frontline organisations about what infrastructure organisations can provide and how they can access that support.

- Associated lack of knowledge between infrastructure organisations about what each offers to BME frontline organisations and where the gaps are.

- Too many BME frontline organisations perceive performance improvement as lacking importance in relationship to their work.

- A lack of skills and knowledge amongst infrastructure organisations of the real issues and problems facing BME organisations.

7.0 Recommendations

This report has highlighted a number of key challenges both for BME frontline organisations who want to improve their performance and for BME and generic infrastructure providers in meeting the needs of diverse organisations. As we have already noted, third sector performance issues do not exist in a vacuum. The way that the sector responds to and uses performance improvement approaches is significantly influenced by its relationships with funders and commissioners. It is vital, therefore, to engage all of the relevant stakeholders in a broader debate. For this reason, the recommendations below are addressed to: BME frontline organisations, infrastructure organisations, and funders and purchasers.

7.1 BME frontline organisations

BME organisations should:-

Consider which approaches to performance improvement are best for their organisation at a particular moment in time

BME organisations should make an informed decision about which performance improvement approaches and tools are most appropriate for their organisation at a particular time. This should be based on an analysis of their own needs and ambitions, rather than led by funders' demands.

Negotiate monitoring and evaluation requirements with their funders and purchasers

Appropriate monitoring and evaluation processes are essential to help organisations know whether they are achieving their aims. BME third sector organisations should negotiate the regulatory requirements of their funders and purchasers so that they provide useful information for both parties. They should be assertive with funders who attempt to insist on inappropriate processes or requirements.

Plan for performance improvement

We found a widespread perception amongst BME organisations that they lack the resources to successfully implement performance improvement approaches.

BME organisations themselves can try to tackle this problem by planning ahead. This will involve doing some preliminary work, which could include identifying their chosen approach to performance improvement, the costs involved and how service delivery and users would benefit. They should include a proportion of these costs in their funding bids.

Identify what support they need to improve their performance and actively seek this support

Many BME organisations would value support with improving their performance but are unaware of what support is available. They should spend some time thinking about what external support they need and what they want to get out of that support. They should think creatively about where to find support, based on the skills and expertise they need. This might include financial support, advice, training, and information.

Share learning with other BME organisations

We found there to be a significant appetite amongst the organisations we interviewed for the peer-to-peer learning and networking benefits that are perceived to be a strong feature of benchmarking.

There is great potential for BME organisations to learn from each other in areas of common concern, such as how to demonstrate the impact they are making, or how to lobby local decision-makers on issues of race equality. They should look to both generic and BME infrastructure, who are in a good position to facilitate this.

7.2   Infrastructure organisations

Infrastructure organisations should:-

Ensure they possess the skills and competencies needed to deliver support to BME third sector organisations

Managers of infrastructure organisations should ensure that development workers have the right skills, knowledge and awareness to deliver good support to BME organisations.

Development workers supporting a diverse range of organisations need skills such as:-
- o   treating everybody equally with respect
- o   communicating in an open and accessible way.

Development workers should develop a wider knowledge and awareness of the local voluntary sector and issues of deprivation and race equality, rather than just their 'cultural awareness'.

Promote their support more clearly, basing their offer on their particular skills and knowledge rather than cultural or ethnic identity

Infrastructure organisations in general need to be much clearer about their offer, based on their particular areas of expertise and skills. They should provide clear guidance on how the support offer works and the expectations that providers and beneficiaries can legitimately have of each other.

Moving beyond providing support tailored for particular ethnic groups could put BME infrastructure organisations in a much more responsive position to provide for an increasingly diverse population.

For this to happen, we would need to see a wider understanding in the public and third sectors that many third sector organisations have the potential to improve the lives of BME communities, not just BME organisations.

Contextualise performance support

Infrastructure organisations need to ensure that performance support is more contextualised within the complex real life environment in which BME third sector organisations operate. For example, they could provide support on monitoring and evaluating racial equality outcomes and campaigning work or balancing long-term strategic planning with responding to changes in community needs.

Promote the benefits of performance improvement more effectively

Infrastructure organisations face a significant challenge in promoting the benefits of performance support to BME organisations. This includes identifying the relevance of performance improvement techniques for the BME sector.

7.3   Funders and purchasers

Funders and purchasers should:-

Encourage collaboration between BME and generic third sector organisations

Our grant to three infrastructure organisations in Bradford showed the benefits of generic and BME infrastructure organisations working together to improve performance support for BME organisations. Funders can play an important role in providing funding schemes which encourage collaboration between BME and generic third sector organisations.

Fund third sector activities on the basis of need rather than cultural or ethnic identity

Funders and purchasers should identify the outcomes they are looking for and the kinds of skills and expertise third sector organisations need in order to deliver those outcomes, rather than assuming that BME organisations' expertise lies in helping people from a particular ethnic group.

Fund relevant performance costs as part of sustainable funding agreements

BME organisations consistently stated a lack of time and resources as one of the main barriers to improving their performance. Many BME organisations regard performance improvement as a luxury they cannot afford. At the same time, funders and purchasers are increasingly asking third sector organisations to evidence the change they make.

Purchasers and funders should aim to get more for their money by working to Compact principles and funding a proportion of related performance improvement costs.

Adopt a more flexible approach to reporting

There seems to be a widespread perception amongst BME organisations that performance improvement is primarily about meeting regulatory requirements. Some interviewees thought the amount of monitoring and evaluation information demanded by funders was unjustified.

Funders and purchasers can get more meaningful information on how the organisations they fund are making a difference, and avoid imposing an unnecessary cost burden, by negotiating reporting requirements with them.

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