

SVA Fundamentals for Impact: are you doing good?

Appendix 3

Effectiveness frameworks from other organisations

1. The Leap Ambassador's Performance Imperative Organisational Self-Assessment (PIOSA)

A notable feature of the seven pillars of the PIOSA tool is the importance it gives to the authentic intention of the organisation's leadership to make the organisation as effective as it can be. Also three of the pillars are related to learning, monitoring, and evaluation:

1. Courageous, adaptive executive and board leadership
2. Disciplined, people-focused management
3. Well-designed and well-implemented programs and strategies
4. Financial health and sustainability
5. A culture that values learning
6. Internal monitoring for continuous improvement
7. External evaluation for mission effectiveness

2. McKinsey's Organisational Capacity Assessment Tool (OCAT)

McKinsey's OCAT is one of the most well-known and used of tools designed to promote effectiveness. It does this by providing an online survey that assesses nine characteristics of an organisation along four levels (1-4), where 1 suggests improvements are needed and 4 suggests the organisation is already strong in this characteristic:

1. Aspirations
2. Strategy
3. Leadership, staff, and volunteers
4. Funding
5. Values
6. Learning and innovation
7. Marketing and communication
8. Managing processes
9. Organisation, infrastructure, and technology

3. NPC's Charity Analysis Framework

Unlike PIOSA and OCAT, NPC's Charity Analysis Framework is not designed as an assessment tool but provides a set of questions about four elements of an organisation that anyone who is reviewing a charity should consider. These elements and questions are:

1. Purpose: Does the charity's vision and mission answer a need? Does the charity have a good strategy for achieving its goals? Do the charity's activities reflect the strategy? Does the charity achieve results?
2. Impact practice: Does the charity use information to learn and improve? Does the charity know what it is achieving? Does the charity have the right approach to evaluation? Is the charity open about its findings?
3. People: Does the charity have good leadership? Does the charity recruit good people and manage them well? How good is the charity's governance? Do people

using the charity help to shape its work? Does the charity have a healthy organisational culture?

4. Finance and operations: Is the charity financially secure? Does the charity have good financial management? Does the charity have good operational management? Does the charity make efficient use of all its resources?

4. Center for Effective Philanthropy's Definition of Foundation Effectiveness

The Center for Effective Philanthropy (CEP) has created a definition of effectiveness for funders based on its own experience and research. The challenges identifying determinants of effectiveness for funders, are notably harder than they are for organisations they fund. Two of the four ways of measuring effectiveness – attracting resources and attaining goals – are not easily applicable to funders who typically do not have to attract resources themselves and who rarely assign themselves specific, measurable goals to attain.

CEP believe that an effective funder:

1. has clear goals;
2. has coherent strategies to achieve those goals;
3. maintains a disciplined implementation of those strategies; and
4. uses relevant performance indicators to assess progress.