**Civil Society Organisations**

**Delivering Culture, Sport, Green Space &Tourism Services**

An Improvement Workbook

**Part of CSIT**

A toolkit to help the culture, sport, green space & tourism sectors to

***re-group, survive & re-grow the services for the community***

**Version 1, July 2011**

Introduction

This Improvement Workbook has been specifically designed to assist civil society organisations which provide culture, sport, green space & tourism services. In broad terms this means…

*Independent, self-governing, non-governmental organisations which are values driven and which principally invest their resources & surpluses to further social, environmental, educational or cultural & sporting objectives in a local community - they include voluntary and community organisations, charities, social enterprises, trusts, co-operatives and mutuals*

This Workbook has been developed by relevant bodies from the culture, sport, green space & tourism sectors to help civil society organisations achieve their Vision & long-term goals through developing their capacity & capability. It is part of the Culture & Sport Improvement Toolkit (CSIT)[[1]](#footnote-1), which aims to improve the capacity and capability of all organisations delivering public culture, sport, green space & tourism services for the benefit of the community.

CSIT is not a ‘product’, an ‘award’ or ‘badge’; it is a ‘journey’ of improvement in all aspects of the way the organisations or partnerships operate underpinned by the concept of Self-Assessment and self-improvement, in order to develop resilience & achieve sustainable excellent results for communities This requires only time, commitment and honesty! Using CSIT is an investment and valuable aid, which will help organisations to improve, whilst demonstrating to onlookers that the organisation is serious about improvement – not as a one-off but as a way of working. Going forward this will be key to receiving and retaining public investment in your organisation.

The Workbook provides you with Vision Setting, Self-Assessment & Improvement Planning tools, which should be used on a cyclical basis (e.g. once a year) as part of your normal review & planning process. The Self-Assessment involves your leadership team & other relevant stakeholders developing a consensus view on your organisation’s current strengths & areas for improvement in relation to the recognised *characteristics* of excellent civil society organisations. This provides a sound basis for developing improvement projects/actions, which should be incorporated into your business plans. Achievement of these improvements over time will develop the capability to achieve your vision and long-term goals.

**Health Warning!**

**Self-Assessment is not a competition, a points-scoring exercise, a ‘blame game’ or a way to improve your image; it is simply an exercise to help you to develop awareness and agree priorities for improvement**.

A Recommended Process

Typically the Vision Setting, Self-Assessment & Improvement Planning process will take approximately 8 hours. This could be split over 2, 3 or 4 sessions:

1. Establish your Self-Assessment & Improvement Team – this should include a facilitator & challenge agent (these could be representatives from a public sector partner / funder or a peer organisation), leaders, key partners & representatives from professional & volunteer staff
2. Remind the Team what you are doing this for (i.e. to enhance the capability to survive & thrive and to make a tangible difference to people in the community)
3. Plan the programme of Vision Setting, Self-Assessment & Improvement Planning Sessions (these could be completed as part of normal management team meetings)
4. Conduct the Vision Setting session (see section 1), reaching consensus on a clear & compelling future for the organisation
5. Develop the Self-Assessment *Characteristics* (see section 2) so that they suit your organisation’s needs & challenges by adding to or altering the bullet points (it is your Self-Assessment!).
6. Conduct the Self-Assessment Sessions (see section 2). During these sessions, ensure everyone in the Team understands the *Characteristic* before assessing your progress against it. When everyone is clear on the criteria, discuss your progress and reach a consensus on ratings, strengths & areas for improvement (aim to establish 2 to 4 of each). Move on to the next *Characteristic*. Keep the sessions fun & energetic and avoid intense analysis.
7. Remember that you do not have to work on all areas for improvement…in fact it is very unlikely that you will have the resources to do this
8. Conduct the Improvement Planning session (see section 3), thinking creatively about the way forward, agreeing & planning actions & eliciting people’s determination to implement these.
9. Document & communicate the improvement actions as part of your business plan

Section 1: Our Vision

Discuss & reach consensus on the following….

When we look back, what do we want to be able to say that our organisation has achieved?

What do we want the community to say about what we have achieved?

What do we want other organisations & people to be saying about our organisation

**How will we know when these things have been achieved?**

What do we want our organisation to be like in 3 years time?

How will we know that when we have achieved these things?

What could happen if we didn’t achieve these changes?

How will achieving these changes benefit the community

Section Two: Self-Assessment

Discuss & reach consensus on your current progress in relation to the following ten Characteristics…

**Characteristic One:**

**We focus on identifying & delivering desired outcomes for the community and other stakeholders**

This includes the following:

* Understanding that the organisation’s existence depends upon achieving sustainable outcomes for the community & other stakeholders (e.g. funders)
* Defining outcomes, based on identified needs & expectations of the stakeholders
* Establishing performance measures to measure & predict achievement of the outcomes
* Focussing all activities on achieving these results
* Having the capability to monitor, measure & report on performance
* Demonstrating value for money and delivery of better outcomes for local people

What is our current progress in relation to these characteristics (tick the appropriate box)?

|  |  |  |
| --- | --- | --- |
| Rating | Definitions | ✓ |
| 0 | *Time for action! -* nothing has been planned so far |  |
| 1 | ***A good start –*** we are planning ways of doing this |  |
| 2 | ***Steadily improving* –** we have partly implemented ways of doing this |  |
| 3 | ***Time for review and improvement*** – we have fully & systematically implemented ways of doing this |  |
| 4 | ***A role model…are we really that good? –*** we have fully & systematically implemented ways of doing this; the effectiveness of our approaches is measured, reviewed & improved; there is evidence that they have worked! |  |

Strengths:

Areas for Improvement:

**Characteristic Two:**

**We are led by visionary, forward-thinking & self-determined leaders who are passionate about making a difference to the community**

This includes the following:

* Developing purpose & vision for the organisation and understanding & committing to the wider *vision* for the area
* Having a profile, communicating well, being a powerful influencer & advocate and campaigning for culture, sport, green space & tourism and for the organisation
* Passionately seeking organisational, team & individual improvement, driving the organisation forward and being a role model of continuous improvement
* Connecting to & building relationships with local strategic organisations & partnerships & relevant public sector bodies (including those with the responsibility for strategic commissioning)
* Ensuing that the organisation is committed to - & plans for - equity, inclusion diversity & social responsibility
* Identifying the roles, responsibilities & competencies of the leadership team, seeking to meet these competencies (through recruitment, learning & development) and planning succession

**What is our current progress in relation to these characteristics?**

|  |  |  |
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**Strengths:**

**Areas for Improvement:**

**Characteristic Three:**

**We understand & respond to the needs & expectations of the community**

This includes the following:

* Defining whom the organisation is providing services for
* Understanding the needs & service expectations of all parts of the community through consultation & research
* Developing services based on the needs of all parts of the community
* Working with all parts of the community, including the most deprived or excluded people, to engage them in the activities
* Engaging people from the community in developing & delivering the services
* Improving the delivery of the service in line with customer expectations

**What is our current progress in relation to these characteristics?**

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**Strengths**

**Areas for Improvement**

**Characteristic Four:**

**We operate a soundly based & transparent system of decision-making & governance**

This includes the following:

* Developing & implementing a business model which suits the operation (e.g. Community Interest Company, Trust, Company Limited by Guarantee, Co-operative, etc)
* Complying with statutory requirements (e.g. health & safety, HR, data protection, accounting, child protection)
* Establishing a suitable, professional organisational structure & management systems, which enables long-term thinking & planning, innovative service development and effective day-to-day management
* Using robust project management techniques to support change, improvement, facility development & delivery of the services
* Assessing & managing risks to the business and creating contingency plans
* Establishing transparent decision-making processes, based on facts, in line with the needs of stakeholders and involving key partners

**What is our current progress in relation to these characteristics?**

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**Strengths**

**Areas for Improvement**

**Characteristic Five:**

**We create, plan & manage the future to ensure sustainability**

This includes the following:

* Predicting & understanding the future needs & characteristics of the community using research from a variety of sources (e.g. community consultation, population profiles, socio-economics, demographics, health trends, etc)
* Understanding what is happening in the wider culture, sport, green space & tourism sectors, including new practices
* Understanding the political, economic, social, technical, environmental & legal environment in which the organisation operates and the strategies of relevant national & local organisations & partnerships
* Developing & communicating a long & medium term direction & plan for the organisation, to help the organisation to survive & thrive in the future and achieve the desired outcomes
* Aligning all activities & resources to this long & medium term direction & plan
* Identifying the need for, planning & managing major change with a constancy of purpose, ensuring people are consulted & engaged in the process

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**Strengths**

**Areas for Improvement**

**Characteristic Six:**

**We manage & develop the professional & volunteer workforce in line with the present & future needs of the organisation, the community & the workforce**

This includes the following:

* Planning the workforce capacity, establishing clear roles & responsibilities and identifying the required competencies & knowledge, to ensure the organisation has the capacity to meet the needs of the community
* Working to attract & recruit professional & volunteer staff with the required competencies & knowledge or the potential to develop
* Supporting professionals & volunteers to develop, learn & improve in line with the needs of the community, the organisation & the workforce (through formal training, informal training, mentoring, sharing of knowledge, projects, job swaps, learning from partners, secondments, etc)
* Developing a team of professionals & volunteers which own collective responsibility for meeting the needs of the community, engaging everyone in developing & improving the service and making the best use of people’s knowledge, skills & creativity
* Communicating effectively with each other, giving professionals & volunteers the opportunity to know as much as they need
* Rewarding, recognising & caring for professionals & volunteers in line with their needs

**What is our current progress in relation to these characteristics?**

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**Strengths**

**Areas for Improvement**

**Characteristic Seven:**

**We develop genuine partnership working & collaborations with public sector, commercial sector & other civil society bodies to help to provide innovative services which meet the needs & expectations of the community**

This includes the following:

* Proactively identifying partners & partnerships which could help to meet the needs of the community
* Seeking & establishing partnerships to help to develop & deliver the services
* Building links & becoming involved in value-adding networks
* Developing & maintaining effective relationships with partners, identifying & resolving any conflicts or tensions
* Create & make the best use of opportunities for collaboration with peers, including mutual peer challenge & support at organisational, team & individual level
* Continually reviewing the value of partnerships and making the necessary changes

**What is our current progress in relation to these characteristics?**

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**Strengths**

**Areas for Improvement**

**Characteristic Eight:**

**We plan & manage present & future financial resources to develop the service, reduce costs & ensure sustainability**

This includes the following:

* Allocating & planning financial resources in line with the long & medium term direction & plans
* Managing financial resources in a robust & transparent way, with the necessary flexibility in place to meet the changing needs of the community
* Proactively seeking & developing diverse & sustainable funding streams
* Identifying & responding to strategic commissioning opportunities
* Continually seeking to make internal practices more efficient
* Establishing collaborations with partners to improve efficiency & value for money (e.g. joint purchasing, joint commissioning & funding bids, shared offices, shared back office functions & shared management)

**What is our current progress relating to these characteristics?**

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**Strengths**

**Areas for Improvement**

**Characteristic Nine:**

**We manage physical assets (premises, equipment, machinery, land, information technology) so that they provide long-term value for money for the community**

This includes the following:

* Making the most of opportunities for asset transfer
* Making the best use of facilities, including joint use with partners
* Planning & implementing preventative maintenance, renewal, refurbishment & ground maintenance programmes to ensure that value for money and customer satisfaction
* Implementing a system for dealing with damaged good, equipment & facilities to maintain customer service
* Implementing effective systems for storage & stock control to ensure optimum use of equipment & consumables
* Proactively seeking & making the best use of new technologies, including information technology

**What is out current progress relating to these characteristics?**

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**Strengths**

**Areas for Improvement**

**Characteristic Ten:**

**We continuously improve & continually innovate so that the services meet the needs & expectations of the community**

This includes the following:

* Reviewing performance (using measurement activity) and planning & implementing improvement in effectiveness & efficiency
* Conducing cyclical Self-Assessment and planning & implementing improvements
* Releasing & making the most of people’s creativity & social entrepreneurialism to develop innovative services, marketing approaches & funding solutions
* Developing & improving the services in conjunction with the community
* Learning from peer organisations and organisations in other sectors
* Learning from the past and using this knowledge to improve the future

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**Strengths**

**Areas for Improvement**

**Section 3: Improvement Planning**

Discuss and reach consensus on the following….

1. **What themes (‘golden threads’ & ‘fault lines’) run throughout the areas for improvement identified in the Self-Assessment?**
2. **Bearing in mind our Vision & long-term goals, which areas for improvement are most important to us?**
3. **Bearing in mind our responses to questions 1 and 2 above, what major improvement projects would make the greatest difference to our stakeholders?**
4. **What will have changed when these projects are completed…specifically?**
5. **Which improvement actions will provide the opportunity for some ‘quick wins’?**
6. **Given your resources, which improvement projects/actions will you be able to complete?**
7. **Think innovatively about the future….what actions could be taken to tackle the improvement priorities? (not ‘what will you do?)**
8. **Of these ideas, which are the best?**
9. **What organisation, team or person would be worth learning from?**
10. **What do they do? This could be an opportunity to arrange a visit to discuss their approaches**
11. **Who will be responsible for taking the improvement projects/actions forward? Who will assist?**
12. **When will they be completed by?**
13. **What support do you need to help you to complete the actions**
14. **How will you document & communicate these improvement projects/actions?**
15. **What will you do to ensure the improvement projects/actions are completed?**
16. **On a scale of 1 – 10 (0 being not committed at all, 10 being passionately committed), how committed are you to each improvement project/action?**

**What would it take to move you to a 10?**

1. This version of CSIT has been designed and developed in association with Steve Wood steve-wood@talktalk.net [↑](#footnote-ref-1)