

Charity Outcomes Framework

PILLAR	CRITERIA	DEFINITION	1	2	3	4	5	6
Leadership	Strength of CEO leadership	Composite of score (average score across three scales below):	1	2	3	4	5	6
		1. Strategic orientation	Reacts to short term opportunities and threats.	Articulates medium term organisational priorities.	Defines organisational strategy, making clear choices and plans accordingly.	Adapts strategy based on arising opportunities and threats.	Anticipates upcoming changes to external environment and adapts strategy accordingly.	Creates long term strategic opportunities for scale.
		2. Results orientation	Demonstrates performance curiosity informed by data.	Dissatisfaction with quality of data.	Dissatisfaction with quality of data and reflective on cost structure.	Embeds culture of management to outcomes and awareness of cost base.	Holds staff to account for data driven learning culture and cost control.	Embeds relentless drive for optimisation of cost per outcome, in context of scale up.
	3. Team leadership	Explains what to do and why.	Allows input from the team.	Engages team commitment.	Empowers teams to perform independently.	Motivates and inspires high-performance teams.	Builds and sustains a high performance team culture.	
Strength of senior management team (SMT)	Main functions = finance / human resources, income generation / communications, programme delivery and impact. Effectively resourced = sufficient capability and capacity.	Some main functional competencies in place.	Adequate resource and capabilities in place for finance; gaps identified for other important roles.	Effective finance capability in place; 2 of 4 main functions effectively resourced.	Effective finance capability in place; 3 of 4 main functions effectively resourced.	All 4 main functions effectively resourced and sufficient for delivery at scale, with clear SMT role, aligned priorities and strong processes.	All main functions effectively resourced for scale up and working well together with proactive collaboration.	
Strength of Board	A stable, effective Board providing oversight of strategic and organisational effectiveness, holding CEO to account and providing fiduciary oversight.	Basic oversight of financial, strategic and operational effectiveness, reactive risk management.	Gaps in Board structure, skills and processes identified: plan in place to develop Board gaps to support needs of the charity.	Well balanced Board in place with clear allocation of roles and responsibilities; Board showing shared purpose, commitment to accountability for financial, strategic and organisational outcomes and emerging proactive risk management.	Well functioning Board in place; clear understanding of roles and responsibilities; Board working with appropriate operating practices, delegation and information flows; holding CEO to account; emerging proactive risk management.	Effective Board providing active support and challenge to CEO. Evidence of enhanced finance, strategic and risk oversight, including management of leadership succession planning; understanding of role of evaluation.	Stable, effectively run Board providing support and challenge to CEO on strategy, finance, evaluation and risk management; good understanding of what is required to deliver at scale.	
Impact	Programme model	Having a clear <u>model</u> for impact.	Partial definition of target population, intended outcomes and intervention. Some gaps and inconsistencies.	Theory of change has been defined at high level.	Theory of change has been defined in operational terms (e.g. detailed activities, assessment scales). Elements of the model have been tested.	Detailed model has been rolled out. Performance standards have been defined.	Programme design is stable, following several full cycles of refinement and as informed by a formative evaluation. Refinements to delivery model underway for replication at scale.	Delivery model has been optimised in order to enable replication of the model during scale up.
	Impact management	<u>Managing</u> to impact.	Performance curiosity and emerging practices on data collection.	Awareness of gaps around impact management, supporting processes and systems. Plans in place to address gaps.	Completed pilot of newly designed impact management practices. Plan to roll out full impact management model.	Impact management model has been fully rolled out, a culture of managing to outcomes is emerging.	Impact management practices refined and now tied to HR practices. Effectiveness of impact management model reflected in fidelity of delivery.	Impact management practices, systems and standards have been replicated across multiple geographies.
	Evidence of impact	<u>Having</u> impact.	Self assessed data surveys and / or output data indicates examples of success.	There is a plausible link between programme design and intended outcomes.	Internally collected data provides evidence of year-on-year improvement in outcome metric that had been defined in theory of change work.	Internally collected data shows higher effectiveness relative to external benchmarks.	External evaluation demonstrates outcomes are caused by the intervention.	Replication evaluation shows that intervention continues to show positive impact in multiple geographies.
Organisational sustainability	Financial health	Mid-term financial viability. Calculation: (unrestricted reserves + confirmed income over next 12 months) / monthly costs.	Run way <3 months	Run way ≥3 months <6 months	Run way ≥6 months <9 months	Run way ≥9 months <12 months	Run way ≥12 months <15 months	Run way ≥15 months
	Financial management	Strength of financial systems and processes.	Good bookkeeping, producing financial statements.	Has an annual budgeting process. Reliably produces monthly management accounts, with strong understanding of cash position.	Produces 3 year forecast of profit and loss and 12 month cash / balance sheet forecasts. Monthly management accounts monitor actual vs. budget, and include cash forecasts.	Finance function is led by qualified personnel. Budgeting is bottom-up, supported by risk-assessed fundraising plans, with good accuracy vs. actual.	Financial function embedded in organisational strategy, with financial performance widely understood throughout organisation. Budgets and management accounts reflect robust understanding of delivery centre / programme costs.	Financial plans provide a ongoing and fully risk-assessed articulation of business plan at all levels of organisation, with quality assurance provided by internal audit and ongoing adjustment to operating environment.
	Scalability	Composite of score (average score across two scales below):	1	2	3	4	5	6
		Assessment of financial readiness to scale.	Financial planning reflects focus on generating annual surplus, in context of incremental growth.	Financial planning shifting to a focus on scale up, including assessment of market demand, projected revenue streams, cost structure, risks and mitigants.	New sources of funding found for scale up with financial plans stress-tested against assessment of future market demand and external factors (e.g. government policy).	Piloting of scale up model enables testing of financial plans for scale up, including cost structure, market demand and funding streams / fundraising approaches.	Financial model for scale up refined, with market demand established, momentum built with funders and cost optimisation plans in place.	Significant growth underway, with reliable financial delivery against plans supported by well-developed finance function.
Assessment of operational readiness to scale.	Operations focused on steady state or incremental growth, but ambition present in leadership for scale up in the longer term.	Emerging awareness of constraints of current business model and core systems and processes, given desire for growth and intended route to scale.	Route to scale established, with implementation plans including plans for upgrading current business model / systems and processes for scale up.	Scale up model piloted in new sites, with changes to systems, organisation structure and business model underway.	Feasibility of route to scale tested and refined based on pilots, with new systems, organisation structure and business model deemed fit for purpose.	Significant growth underway with new sites successfully opened and business model / systems and processes proving sustainable at scale. Additional rounds of growth planned.		
Partnership	Strength of partnership	Composite of: openness and trust, benefit from Impetus-PEF's value-add, commitment to meaningful social impact.	Interest in social impact but little action. Does not engage Impetus-PEF with areas of concern.	Actively engaged in developing plans, discusses difficult issues with team, interest in impact management approach.	Maintains good level of direct communications, co-owns process and begins to ask questions for clarification and support.	Good level of direct communications, proactively seeks support and leverages Impetus-PEF; owns plan.	Seeks and responds well to coaching and feedback, engages all aspect of Impetus-PEF support and committed to meaningful social impact.	Pro-actively engages Impetus-PEF support to drive impact and scale up. Fully owns process and plan commitments.

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