Introduction

Under the 2nd Joint Business Improvement Project (JBIP) coordinated by The Hong Kong Council of Social Services, PricewaterhouseCoopers (PwC) has developed a Performance Measurement and Management Tool (PMMT) to facilitate social service organizations in planning and managing the organization's performance.

With the introduction of Lump Sum Subvention (LSG), Funding and Service Agreement and Service Performance Management System (SPMS), the Non-Governmental Organizations (NGOs) in the social welfare sector will no longer be operating as an extension of the Government. NGOs are substantially assuming the management role in respect of finance and human resources that was previously performed by the Government. NGOs therefore need to be more self-reliant and strategic in building the necessary systems and competencies to fulfil their role, facilitating a change of mindset among the staff, and learning how to leverage the flexibility offered by LSG.

Objectives of the PMMT

The purpose of the PMMT is to provide a set of management tools for the agencies to:

- Identify a set of critical performance measures that can quantify the intangible value of non-governmental organization (NGO) output and outcome in relation to the Vision, Mission and Value at various organizational levels
- Measure & analyse anticipated outputs & outcomes of specific programs
- Plan and manage changes, implement new strategies rapidly and effectively for performance improvements
- Identify risk factors and system gaps
- Introduce enhancement & improvement opportunities

How to use the manual

This manual is a tool book that helps you to develop the PMMT for your organization.

Part 1 of the manual facilitates the understanding of the PMMT by introducing its basic concepts.

Part 2 provides a step-by-step approach on how to implement the tools to fit your organization. The demonstrations, based on the context of an NGO, allow you to visualise the execution of each step. Tips are also provided throughout this section to guide you in using the relevant forms or templates.

Part 3 contains the Common Tool that is developed from this project. The Common Tool serves as a template for agencies which have not participated in this project to develop their own PMMT. Since the actual PMMT may contain confidential information that is not suitable for training purpose, the Common Tool can also be used as a template for training.

Part 4 is the Appendix reference and templates including the Glossary, Chinese Translation of Terms, KPI Inventory, Information Deck and Workbook. These information and templates are handy tools to help you further understand and implement the PMMT within your organization.

簡界

項目顧問公司羅兵咸永道在社聯統籌第二次聯合業務改善項目中，為社會服務界別設計了一套機構表現量度及管理工具，以幫助機構策劃及管理機構表現。

由於整筆撥款、資助及服務協議及服務表現監察系統的實施，社會服務機構在運作上將不會成為政府機構的延伸，其財務及人力資源會由政府管理轉變為由社會服務機構自己管理。所以，社會服務機構需要更有策略及自主地建立有關系統及能力，以履行他們的管理角色、協助員工改變思維及學習怎樣控制整筆撥款所提供的彈性。

機構表現量度及管理工具之目標

機構表現量度及管理工具旨在為社會服務機構提供一套管理工具，為機構：
- 確定一系列決定性的量度表現要素，聯繫機構的願景、使命及價值，量化機構無形的結果及產物
- 量度及分析特定節目預計所帶來的結果及產物
- 計劃及管理變革，有效及迅速地實施新策略，以改善機構表現
- 確定風險因素及系統缺口
- 提出改善及提升服務的機會

怎樣使用此手冊

此手冊是一本工具書，協助你為貴機構發展機構表現量度及管理工具。

手冊的第一部份會介紹基本概念，協助你明白機構表現量度及管理工具。

第二部份提供可行的步驟，助你根據機構的需要，為機構實行及使用此機構表現量度及管理工具。透過一間社會服務機構的實例，助你想像每一步驟怎樣實行。此部份亦有小提示，引導你使用相關的表格及範本。

第三部份包括此項目所發展出來的共用工具。此共用工具為未參加此項目的機構，提供一個範本，以協助他們發展切合自己機構的機構表現量度及管理工具。由於真實的機構表現量度及管理工具包括很多保密資料，並不適用於培訓，此共用工具可以應用於機構的培訓中，協助知識傳遞。

第四部份是附件。附件內提供參考資料及範本，包括辭彙解釋、主要表現標竿目錄、資料庫及工作簿。這些資料及範本是便利的工具，幫助你明白如何在機構內實行機構表現量度及管理工具。