

Performance Index Tools

Detailed video course outline

Learning Outcomes

By the end of this video course learners will be able to:

- Describe the Organisational Performance Index domains and sub-domains.
- Describe how the Organisational Performance Index is similar and different from other measurement tools.
- Conduct a step-by-step process for Organisational Performance Index data collection, tabulation, and analysis.
- Articulate how Organisational Performance Index results can be used for continued organizational development.
- Describe the similarities and differences between the Organisational, Government, Network, Professional Association and Community Performance Index and identify which should be used in their programmes.

Learning Materials

In addition to the video course, the following types of materials will be available:

- Quizzes per module;
- Built in exercises; and
- Additional reading materials (i.e. Pact's and AKF's Organisational Performance Handbook, Pact's Governance Performance Handbook, examples of adapted Community Performance Indexes (Myanmar, Malawi, Nigeria), Performance Improvement Quarterly The Organizational Performance Index A New Method article (if published), link to USAID's Learning Lab library entry on the OPI, link to GPI reliability study).

Outline

Module 1: Introduction to the Organisational Performance Index

This module provides an overview of the course and introduces the Organisational Performance Index. The module defines key terms which will be used throughout the course. The module details the OPI framework, domains and sub-areas descriptions, and target audience for the OPI.

Lesson 1: OPI Course Overview

This lesson introduces the overall purpose of the course and for whom it is intended. It presents the course's overall objectives and how the participants can expect to benefit. Finally, the lesson

provides an overview of the content covered in the course and learning materials (quizzes, exercises, and additional references) used throughout the course.

Lesson 2: OPI Purpose and Key Terms

This lesson begins by questioning the purpose, reliability and validity of various organizational development measurement tools. It does this by presenting a few common tools, such as the Organisational Capacity Assessment, Pre-award Assessment, and programme evaluation. Each tool's purpose, benefits and constraints are demonstrated. Thus, the gap that the OPI fills becomes clearer to the learner. The lesson also introduces key terms such as capacity, performance, input, output, outcome, impact, reliability, validity, monitoring, and evaluation. Learners are provided a reference to the Learning Management System (LMS) for the Pact Organisational Performance Index Handbook which contains a glossary. It is noted that the Handbook is available in English, French, Portuguese, and Dutch (Bahasa Indonesia, Ukrainian?).

Lesson 3: OPI Framework and Target Audience

This lesson introduces the OPI framework. The Index structure is introduced (4 domains and 2 sub-domains per domain). Levels one through four, domain and sub-area definitions, and evidence are quickly highlighted in context of the structure. The method for developing the OPI is quickly addressed as is the target audience for the OPI. Learners are told that in a later module, additional tools are introduced for government, community groups, professional associations, and networks. Learners are referenced to the LMS for the OPI in the Pact OPI Handbook.

Lesson 4: Effectiveness Domain

This lesson defines the Effectiveness domain. The lesson then provides detail about levels one through four for the sub-areas Results and Standards. Types of evidence for each sub-area are quickly highlighted. In this first lesson on an OPI domain, the lesson clarifies that scores are based on the organization and not a specific project.

Lesson 5: Efficiency Domain

This lesson defines the Efficiency domain. The lesson then provides detail about levels one through four for the sub-areas Delivery and Reach. Types of evidence for each sub-area are quickly highlighted.

Lesson 6: Relevance Domain

This lesson defines the Relevance domain. The lesson then provides detail about levels one through four for the sub-areas Target Populations and Learning. The difference between Reach

and Target Population is specifically highlighted in this lesson. Types of evidence for each sub-area are quickly highlighted.

Lesson 7: Sustainability Domain

This lesson defines the Sustainability domain. The lesson then provides detail about levels one through four for the sub-areas Resources and Social Capital. Types of evidence for each sub-area are quickly highlighted. This lesson and module conclude with a quick description (and reference to the LMS for instructions / materials) of an activity learners can complete to “test” their knowledge of the OPI structure and content (puzzle). Finally, learners are reminded to complete the quiz that accompanies this module.

Module 2: Completing an OPI Measurement

This module introduces learners to the steps required in completing an OPI measurement process: Preparation, Data collection, Data tabulation, and Data analysis. Tips and tools for each step are presented. This module incorporates lite case studies from AKF, Pact and Global Giving about how they have successfully completed each step in countries such as Suriname/Eastern Caribbean/Haiti (Pact), Nigeria (Pact), Mozambique (AKF), Kenya (AKF), Ukraine (Pact), India (GG) (if better locations please specify).

Lesson 8: OPI Measurement Process

This lesson introduces the steps in completing an OPI measurement: Preparation, Data collection, Data tabulation, and Data analysis. The lesson introduces learners to two general methods, one which is partner led and one which is facilitator led. The methods’ benefits and challenges are discussed allowing learners to make a conclusion about the method best suited to their context.

Lesson 9: OPI Measurement Preparation

This lesson details why preparation is important to the success of data collection, analysis and eventual reporting and use. The lesson highlights steps to take to train facilitators, introduce partners to the OPI, and key logistics considerations. The lesson spends time outlining who should be engaged from a partner organization and the facilitating organization, how they can work together and at which points they should each be involved. The lesson also highlights what can (and cannot) be adapted in the OPI for the context. Specifically, the lesson will address the types of adaptations that can be to evidence along sector and contextual lines. A lite case study is presented on XX’s experience in training their staff to be OPI facilitators and data collectors and a second case study on how the OPI was adapted for a global LGBTI programme (Pact – i.e. what evidence changed/added).

Lesson 10: OPI Measurement Data Collection

This lesson details the steps which are taken in the participant led and facilitator led methods (this lesson may be broken into two videos corresponding to the method or broken into parts a and b). The lesson outlines the standard type of data that should be collected when scoring the OPI (i.e. organizational name, location / address, number of years in existence, number of years in partnership with facilitator, primary intervention area, types of capacity development provided by facilitator in last 12 months, method used for data collection, type of organization, woman/youth/people with disabilities/minority/LGBTI led). Learners are referenced to the LMS for examples of data collection forms. The frequency of data collection is addressed – with a preference given to annual collection on 12-month increments.

Lesson 10.1

This lesson addresses the issue of evidence, looking more closely at how partners and facilitators determine the relevance of evidence as well as the quality. A lite case study is presented on AKF's experience in data collection and specifically how evidence was reviewed.

Lesson 11: OPI Measurement Data Tabulation

This lesson provides guidance on how to tabulate individual organisation, programme and facilitator organisation wide measurements. The lesson explains why year on year collection is important and how to compare time series data.

Lesson 11.1 AKF Data Tabulation

The lesson provides information on AKF's uses of a database built upon Salesforce for tabulation. A lite case study is presented on how AKF uses Excel spread sheets to tabulate scores.

Lesson 11.2 Pact Data Tabulation

The lesson introduces Pact's Capacity Solutions Platform as another option for score tabulation and organizational report production. A case study is presented on how Pact uses the CSP for data collection.

Lesson 12: OPI Measurement Data Analysis

This lesson provides examples of OPI individual organization reports, highlighting the types of information each organisation should have following an OPI measurement. The lesson outline key questions organisation leaders and facilitators should ask in completing data analysis. These questions are categorised by individual organisation (baseline and follow-on), programme (baseline and follow-on), and facilitator organization wide (baseline and follow-on). A lite case study is presented on how AKF led a data analysis discussion with an individual partner. Learners are reminded to complete the Module 2 quiz.

Module 3: Using OPI Data

This short module provides from tips for how OPI data can be used at the individual organization, programme, and facilitator organisation wide levels. Lite case studies from AKF, Pact, and GG are built into the lessons.

Lesson 13: Planning for Change (individual organization)

This lesson introduces learners to how they can incorporate their data analysis into various reports, proposals, and planning processes. A lite case study is provided by Pact on how OPI data and goal setting was linked with an organisation's OCA and Institutional Strengthening Plan / used to advocate for additional funds from a donor.

Lesson 14: Planning for Change (programme and facilitator organization wide)

This lesson introduces learners to how they can incorporate their data into wider programme and organization wide planning processes, reporting, and fundraising. A lite case study is presented on how Pact collects and uses the disaggregation data. Learners are referenced to the LMS for the link to the blog on "Using data to understand what makes capacity development a success" and an example of Pact's annual "Measuring Our Mission" report. Learners are reminded to complete the Module 3 quiz.

Module 4: OPI Alternatives

This module highlights two alternative tools that can be used when the OPI may not be appropriate. The similarities and differences between the OPI, Government Performance Index and Community Performance Index are highlighted.

Lesson 15: Government Performance Index

This lesson introduces the GPI – its structure, defines the domains and sub-areas and quickly highlights the types of evidence that facilitators should seek while measuring. The "how to" in GPI measurement preparation, data collection and data tabulation are quickly outlined. Learners are provided information on the benefits and drawbacks of using the GPI. Recent results from Pact's GPI reliability study are presented as well as a lite case study on how Pact has used the GPI in XX context. Learners are referenced to the LMS for more information on the GPI including the Pact GPI Handbook, blog/report on the GPI reliability study and the PIQ article on the reliability and validity testing of the OPI.

Lesson 16: Network, Association, and Community Performance Indices

This lesson briefly introduces some preliminary work AKF has completed to develop a Network Performance Index and an Association Performance Index. The two indices are presented quickly, each providing a quick case study of where and how they have been used by AKF. The lesson also introduces the CPI – its structure primarily. The lessons outlines a process Pact facilitators have taken with partners for customising the CPI to a country or sub-country context. A lite case study is presented on how Pact customised the CPI in the Malawi fisheries context. The lesson highlights how the process of customisation and facilitation of the CPI makes this performance measurement different from the OPI and GPI as well as the NPI and API. Learners are presented with the benefits and drawbacks of using the CPI. Learners are referenced to the LMS for CPI Facilitator Guides from Myanmar, Malawi, and Liberia.

Lesson 17: Closing the Loop in Performance Measurement

In this short final lesson learners are given some tips for mistakes to avoid, how to choose which performance measurement tool is right for them, and a reminder to complete the final quiz. Tips will include things like: addressing disagreement between partners and scorers in the final score, etc.