

Piloting the Organizational Performance Index (OPI)

Feedback from USAID/Malawi and Pact

Malawi Experience

Malawi sat down with Counterpart and DAI, their two implementing partners, who volunteered to pilot OPI with Mission observation; they did two jointly and Counterpart did a third. This pilot exercise was conducted in June and July 2015, targeting one stronger and one less experienced organization. They wanted to see how OPI could complement existing tools such as OCA or PODA (Counterpart tool for institutional capacity) and to generate lessons around best practices for its use.

The duration was about 3-4 hours, first hour to do an overview and brief on the tool and process, then the actual exercise of reviewing evidence where they have it or identifying gaps in the evidence, takes a bit longer to go through the evidence and confirm score. It takes another half day to score after meeting in some instances, where evidence needs further validation, so it is safe to allocate a full day to do the OPI for the first time. Frequency of OPI application Malawi plans to use – will be annually as a complement to OCA.

Strengths

Strengths identified through the process include that it is very clear how it complements OCA/PODA. OPI is helpful in identifying some weaknesses not identified through OCA, which has more emphasis on financial areas and internal management.

OPI is also a useful tool because it is evidence-based. After the process, the partners were helpful with the tool, in terms of their relevance and other domains, found it useful.

Weaknesses

Weaknesses in OPI tool is the relationship between sub-domains and domains. OPI has no guidelines for how to combine sub-domains into domains, or how to further merge into a single index. [Pact clarified that they combine sub-domains as a simple average]. Using OPI to measure requires understanding each domain separately; could be a bit confusing, although there is also value in not having a single score per organization.

A second weakness was around the novelty of the tool and its language. The organizations were not always able to find evidence to justify with a score in some cases because it was difficult to understand what was sought. Some partners also found the language in OPI new and challenging, required some orientation to the topics. OPI could seem a bit vague in its language. It required some time to explain the terminology.

Finally, although it is a measurement tool, important to still build some ownership so that partners can understand how they can make use of it. Where partners undergo a number of standard evaluations such as audits, they can perceive it purely an external audit, and not be as eager to cooperate. Partner needs to understand that it is not a self-assessment nor an audit, but something else – making clear. It can be difficult to clarify why we are doing an OPI if we already have the self-assessment tools.

Tips

It was useful to share the OPI handbook in advance so that the partner could have time to go through it and understand it.

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It was useful to explain to them how we were grounding whether they were a stronger, more systematically organized entity (the focus of OCA/PODA) by using OPI to actually see whether their strength as an organization was enabling them to perform. This facilitated a conversation getting beyond changes in scores about capacity to see whether they were having more impact on the ground.

Some of the smaller organizations that are less well-established may have more relevance and perform well, while even very strong organizations in terms of internal functions did not achieve as strong performance. OPI also could be a way to go deeper beyond management function.

Before using OPI, you need to know your partners well; some are NGOs while some are private sector businesses, and this affects which evidence you ask for.

After going through the OPI, they were better able to address the connection from internal reviews to their performance and modified their action plans as well as TA. For example, moving from having an M&E system to working further on how it is used – have the tools for purpose of requirements, but not using it themselves. OPI allowed Mission to go further to make the support more effective.

Recommendations

The Malawi Mission shared two main recommendations:

- Do scoring at sub-domain levels; these are very separate, so cannot easily combine into a single score.
- Come up with more specific questions, in a standardized fashion, to get at the evidence needed for each area, in advance of the meetings – anticipate the type of evidence that the partners may provide to facilitate their ability to understand and support it.
- Finally, Malawi noted that they will be updating their reporting around OPI tool around mid-year to be able to share a full report more broadly.

Pact Learning

Pact's Rachel Dubois was on the call from Indonesia, and also shared some of their feedback. She noted that in terms of who should be engaged, it is useful to use OCA in transparent and participatory way with whole organization, but stressed the primary use of OPI together with senior leadership or those who can speak to the questions as evidence – it doesn't require the same level of involvement of all staff. She also reiterated that it is very useful to attach OPI to an OCA if already doing one (or something similar like PODA), because participations will often see the transcription from OCA to OPI as from output and outcome, which helps situate both.

In response to a question on data use, given the sub-domain and domain scores, she cited several uses of data – Pact takes scores annually, and it can inform the partners' areas of focus over the coming year. A second use is to look at scores from sub-domain and domain levels to track change over time and trends; this can include looking at correlation in OCA scores/action plan tasks and OPI scores, and also changes in OPI domain scores of individual partners as compared with what they see in wider country trends.

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