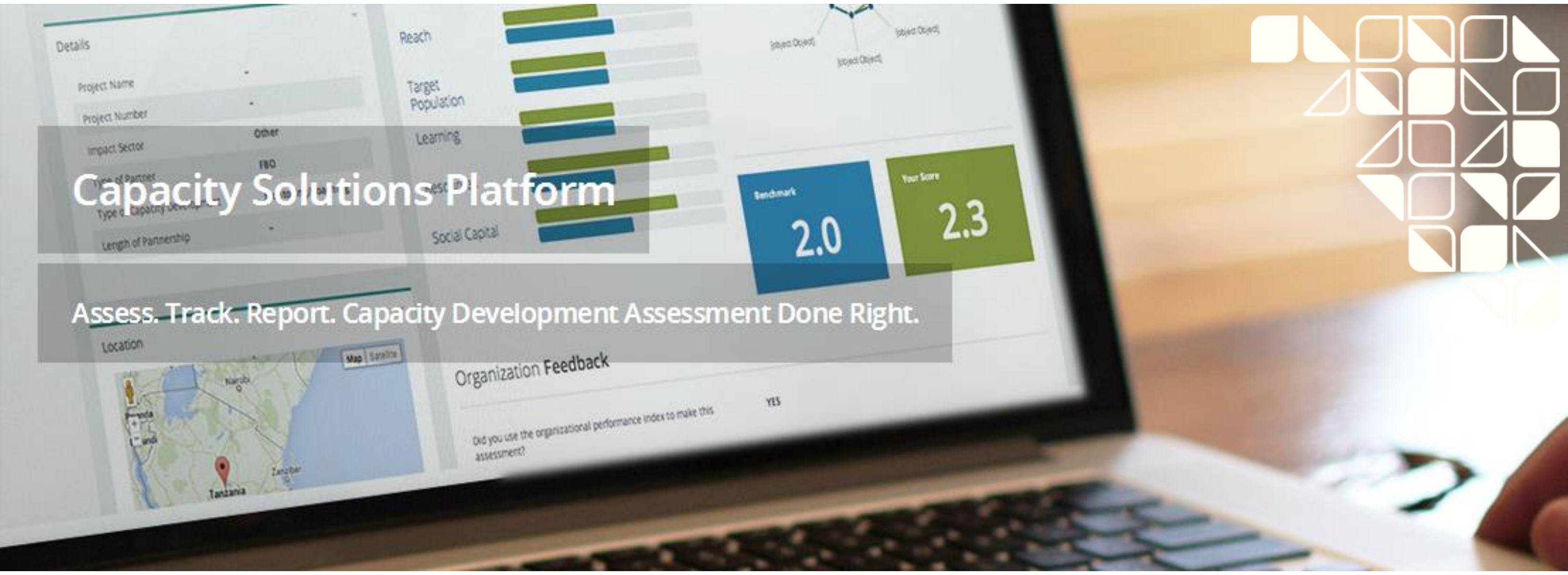

Capacity Solutions Platform (CSP)
User Guide for Partners

Version 2.0

September 2016

Pact is a promise of a better tomorrow for all those who are poor and marginalized. Working in partnership to develop local solutions that enable people to own their own future, Pact helps people and communities build their own capacity to generate income, improve access to quality health services, and gain lasting benefit from the sustainable use of the natural resources around them. At work in more than 30 countries, Pact is building local promise with an integrated, adaptive approach that is shaping the future of international development. Visit us at www.pactworld.org.

September 2016

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Contents

Abbreviations and Acronyms

CD	capacity development
CPI	Community Performance Index
CSP	Capacity Solutions Platform
GPI	Government Performance Index
ISP	Institutional Strengthening Plan
NUPAS	Non-U.S. Organization Pre-Award Survey
OCA	Organizational Capacity Assessment
OPI	Organizational Performance Index
T&M	training and mentoring
USAID	United States Agency for International Development

1. Introduction to the Capacity Solutions Platform (CSP)

1.1. What is the CSP?

Pact has invested in creating a central platform to complement its decades of capacity development (CD) work in helping local and international organizations better understand and use their CD data. The resulting web-based Capacity Solutions Platform (CSP) administers, measures, analyzes, and reports on CD results. It allows partners to enter data directly into the platform, view results online, and instantly share results through automated reports.

The CSP currently incorporates the following Pact tools:

- Performance indices:
  - Organizational Performance Index (OPI)[1]
  - Government Performance Index (GPI)
  - Community Performance Index (CPI)
- Organizational Capacity Assessment (OCA)
- United States Agency for International Development (USAID) Non-U.S. Organization Pre-Award Survey (NUPAS)
- Organizational Network Analysis (ONA)
- Training and Mentoring (T&M) Tracker

Pact staff in Zambia review data on the CSP on their mobile phone at a meeting.

To learn more about Pact's CD tools, visit Pact's Resource Library at http://www.pactworld.org/library, where you can download our Creative Commons-licensed materials. And, read more about how Pact is using the CSP at www.capacitysolutionsplatform.com.

1.2. Why did Pact create the CSP and what benefits does it offer?

Currently, no industry standards exist to measure organizational capacity. Each organization has its own tool, and few organizations have reliable, valid tools that measure how CD links to organizational performance. This often leads to information silos, where organizations have access only to their own data and local partners and donors lack access to this data to support decision-making.

Pact created the CSP as a solution to these issues to:

- Offer a common platform, accessible to organizations, partners, and donors
- Promote use of common tools and calculation methods
- Allow easy data entry and storage
- Produce results displayed in simple and visually appealing ways

[1] Pact's OPI has been endorsed by the USAID Local Solutions team as a strong outcome-level measurement of organizational capacity development. See more at https://usaidlearninglab.org/library/organizational-performance-index-measurement-tool.

1.3. Who can use the CSP, and how?

Local partners can view, analyze, and submit their CD data to track their performance over time, make decisions on investments in CD, and share their results with external stakeholders like board members or donors. *This manual specifically is designed for local partners using the CSP.*

Pact uses the CSP to view CD data and make decisions on what types of CD interventions to carry out at the partner, project, regional, and global levels. Pact staff have access to all data on the CSP.

Donors also have the opportunity to access the CSP to view summary CD data of the organizations supported under their projects.

1.4. Where is data stored?

The CSP stores data in the cloud so that data easily can be shared with staff who can help with analysis, planning, and reporting from anywhere and in real time.

1.5. Is data secure on the CSP?

Yes. The CSP uses industry standard SSL (encryption) security for all work. Your data is hosted in a secure hosting facility and regularly backed up.

1.6. What is the demo CSP site?

The demo site allows Pact staff to train others on and to practice using the CSP. As such, data on the demo site is not accurate. Notably, new features are released on the demo site before going to the live site to allow Pact staff and CSP users time to practice the new features before they can potentially affect CD data stored on the CSP.

To access the demo site, go to http://demo.capacitysolutionsplatform.com. You will need to have a special demo account created for you to access the demo site.

1.7. How do I register or request an account?

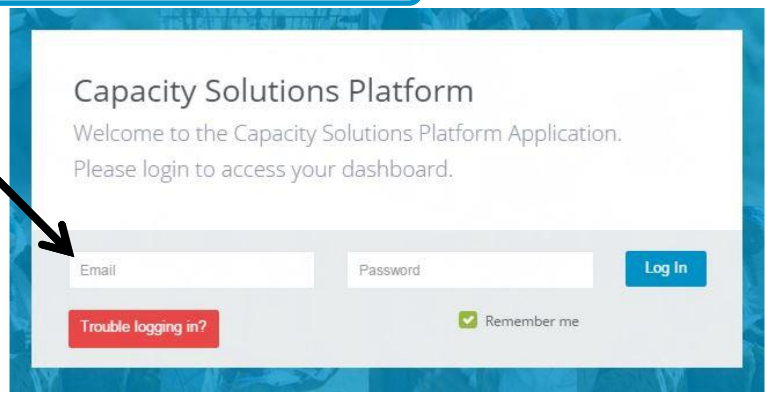
To request access to the CSP, you can contact the Pact staff member you are working with or you can email csp@pactworld.org. Once your account has been created, an email will be sent that includes your temporary password and a link to login to the site.

2. Login Process and Troubleshooting

2.1. How to Login

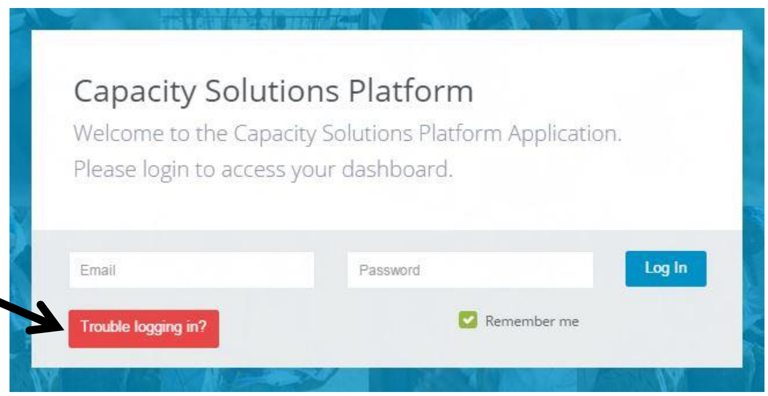
Step 1: Go to http://pact.capacitysolutionsplatform.com/login.

Step 2: Enter your email and the password given to you by Pact staff or sent to your email upon registration.



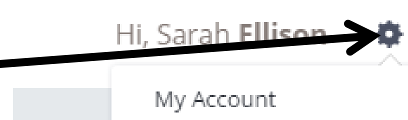
2.2. Recovering your Password

Click "Trouble logging in?" to recover your password. A new, temporary password will be sent to your email account.

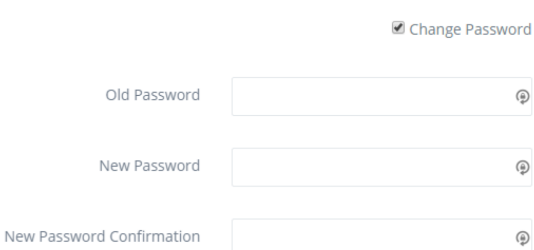


2.3. Changing your Password

Step 1: Click on the settings wheel next to your name, then click "My Account."



Step 2: Click "Change Password." Type in your temporary or old password, then type in your new password twice.



Step 3: Click "Save."

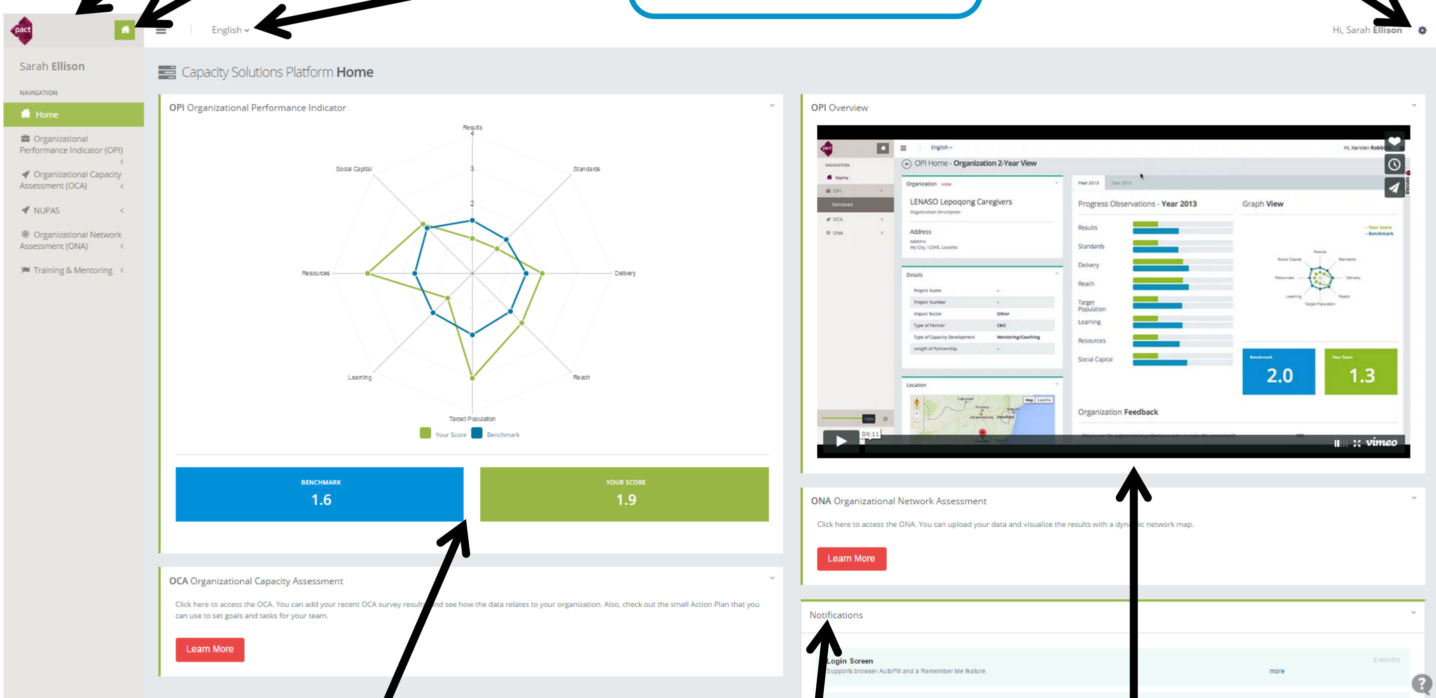
3. The CSP Homepage

Navigation Panel
From this panel, choose which capacity tool to explore.

Home Button
Click here to get to the home page anytime.

CSP Settings
Here you can make changes to your account.

Language Menu
Choose your language from various options.

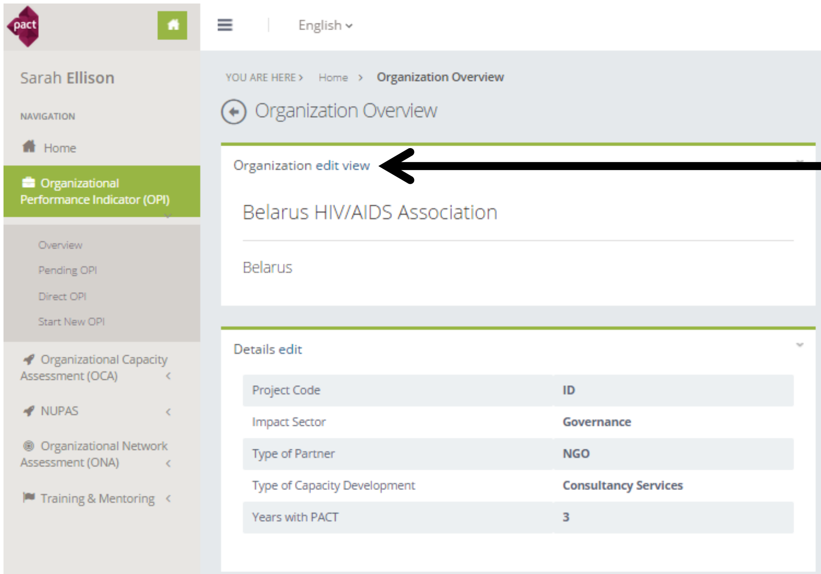


Additional Capacity Tool Panels
Panels showcasing (only) the tools you use and your organization's data will be linked here for quick reference.

CSP Videos and Tutorials
This panel showcases videos and instructional tutorials on using the CSP.

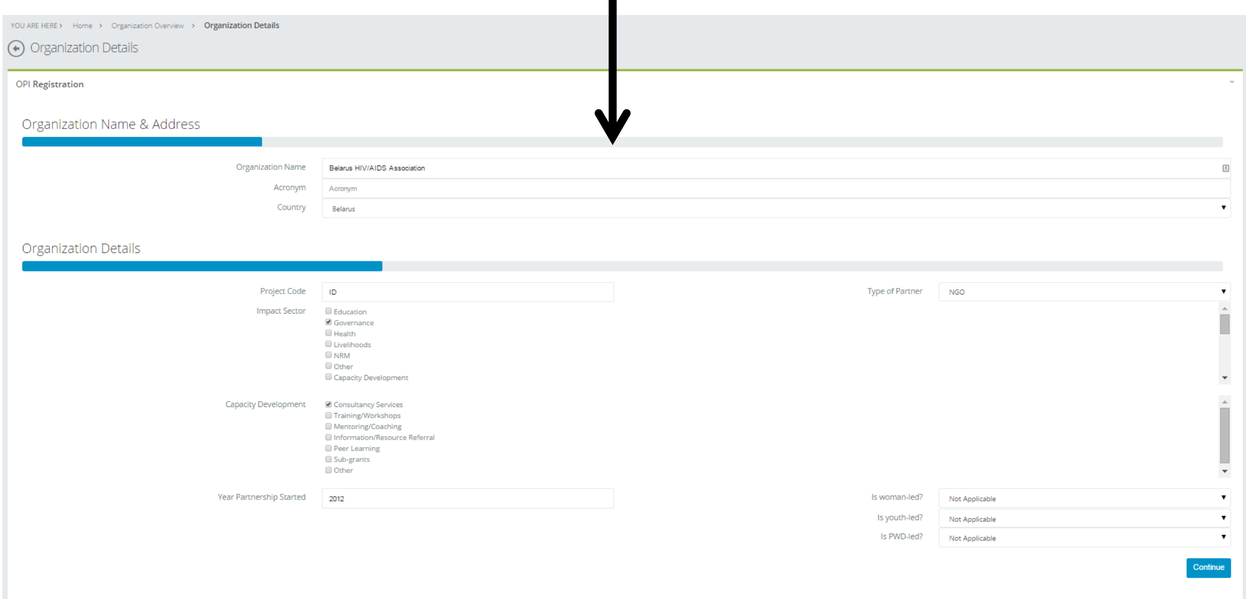
Announcements
This panel shows updates that the CSP designers and developers have made recently.

4. View and Edit Organization Details



When viewing any data, you have the option to view and edit your organization's information. Click the "edit view" button to make changes to your organization's details.

Organization Details: Correct the name; enter a project code; set the type of partner, impact sectors the organization works in, type of capacity development (CD) support received by Pact, and years of partnership with Pact; and designate if the organization is led by women, youth, or a person(s) with disabilities. Click "Continue" when done.

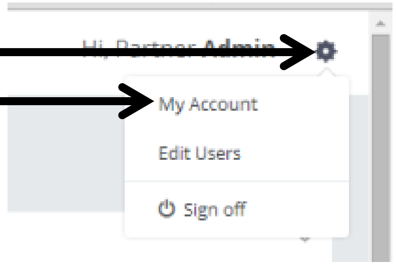


5. Partner Account Settings

Partners can edit their account information, add and edit CSP users from their organizations, or sign out from the settings wheel.

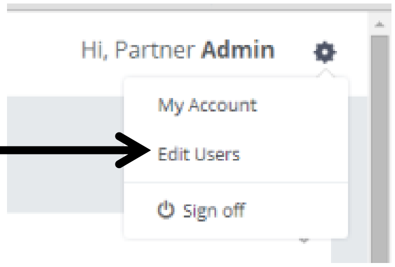
5.1. Edit Account Information

Step 1: Click the settings wheel in the upper right-hand corner of the CSP homepage, then click "My Account" to view and edit your account information.

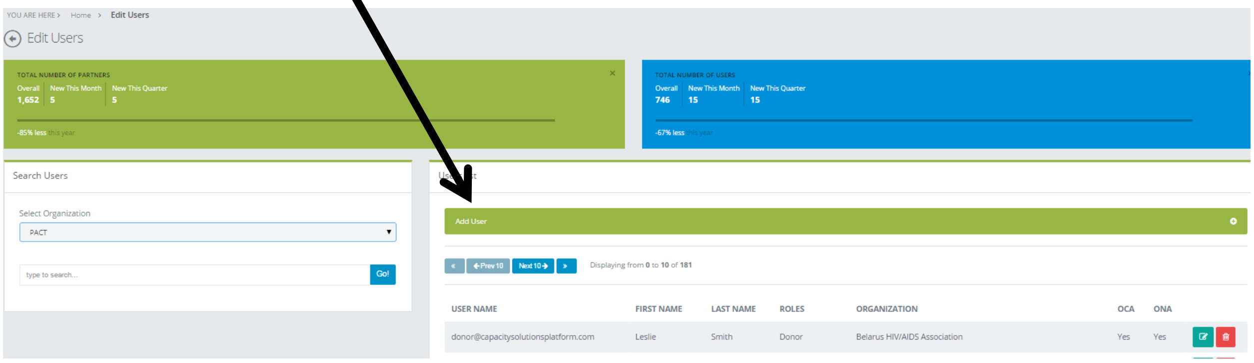


5.2. Add Account Users

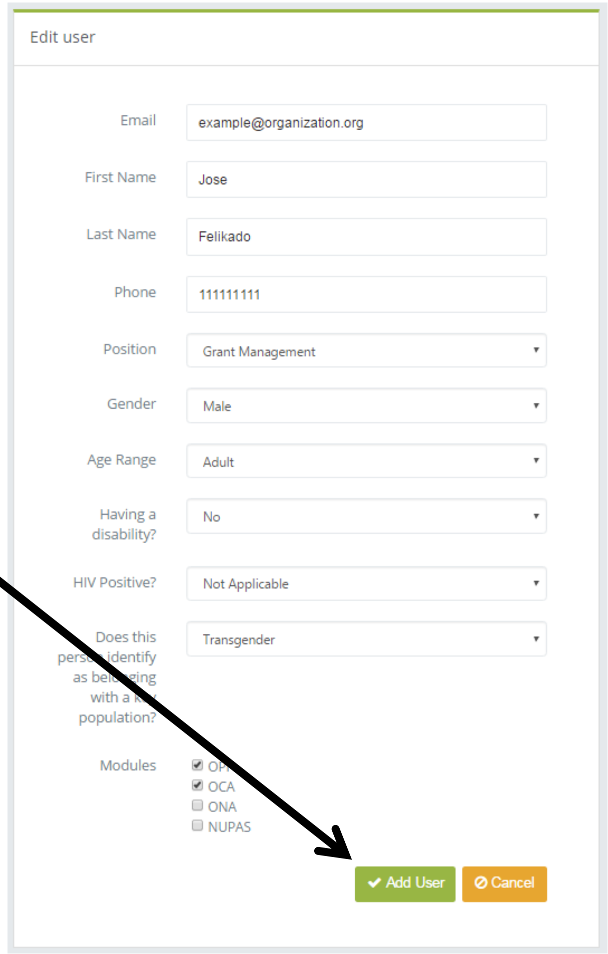
Step 1: Click on the settings wheel in the upper-right hand corner of the CSP homepage, then click "Edit Users."



Step 2: Search to see if the user already has a profile on the CSP. If not, click "Add User."



Step 3: Complete all the fields. Check the boxes for the capacity tools the new user should be able to view. Click the green box "Add User" when complete. The new user will receive an email with a temporary password and a link to the CSP.



6. Working with OPI Data

6.1. Introduction to the OPI

The Organizational Performance Index (OPI) is a tool that measures the change in organizational performance that results from improved internal capacity. The OPI tracks progress across the four domains of effectiveness, efficiency, relevance, and sustainability. The sister-tools to the OPI include the Community Performance Index (CPI) and the Government Performance Index (GPI), which operate the same way as the OPI on the CSP.

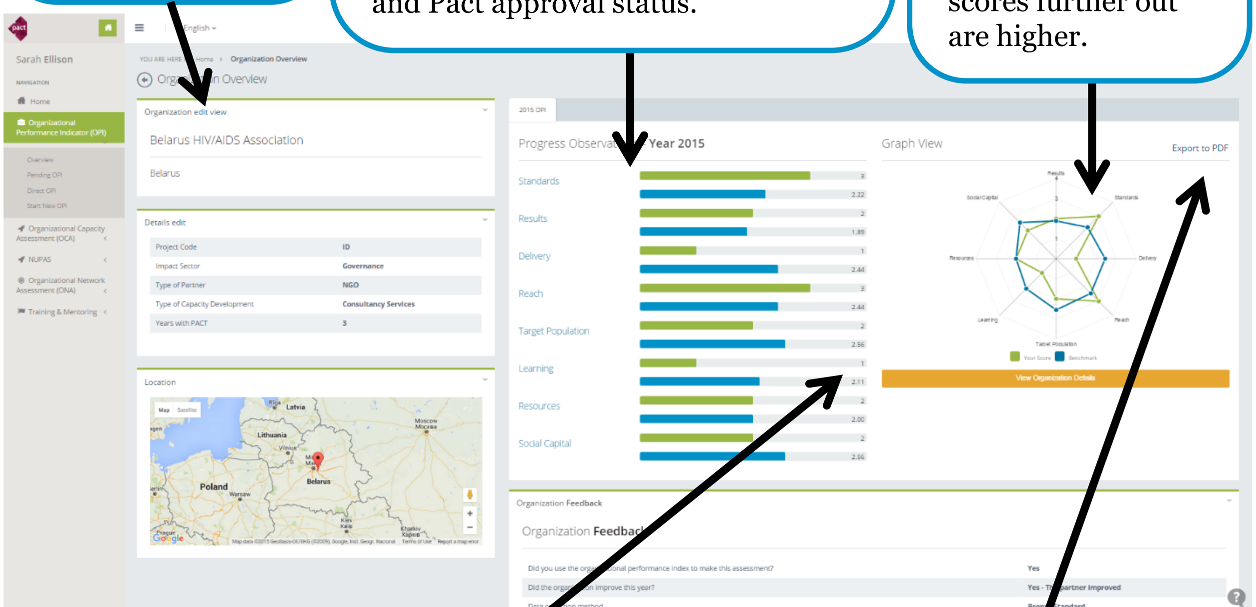
6.2. The OPI Dashboard

The OPI dashboard page will allow you to view your OPI score, view and edit your organization's information, and save your OPI report to PDF.

Organization Details
When viewing any capacity tool, you have the option to view and edit your organization's information.

OPI Sub-Domain Chart
View your score against the sub-domain benchmarks, which compares your results to those of the other organizations in your country in that year. Click on any sub-domain to view your results, relevant comments, uploaded evidence files, and Pact approval status.

OPI Spiderweb Graph
Visualize your annual capacity scores against benchmark scores. Scores close to the center are low and scores further out are higher.

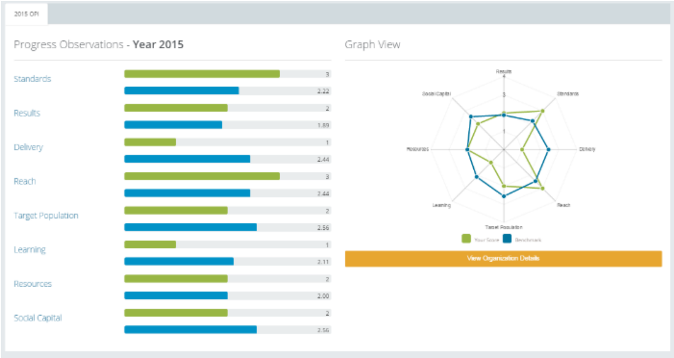


Multiple OPI Scores by Year
If you have conducted multiple OPIs, click here to see additional tabs with your OPI scores by year or to export PDF versions of your other results.

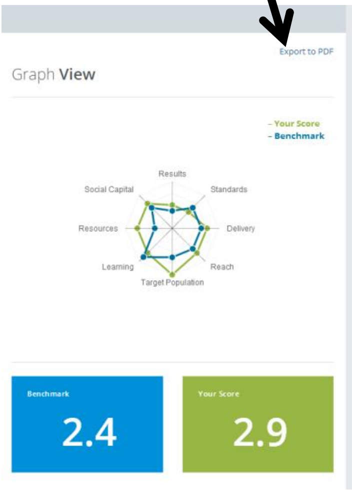
Export to PDF
Click "Export to PDF" in the right-hand corner of a tool summary to download the data in a PDF report.

6.3. Exporting OPI Results

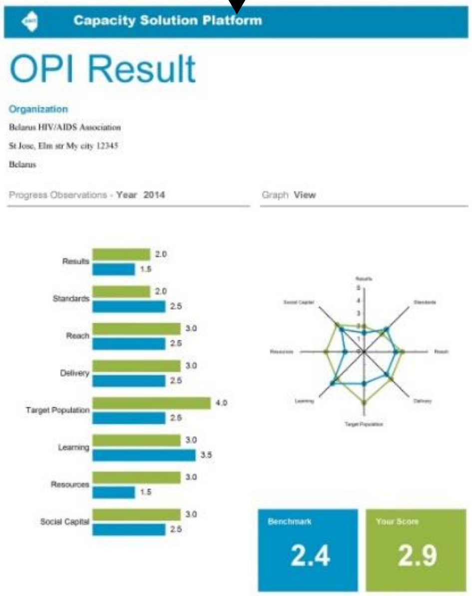
Step 1: Click "View Organizational Details" below the spiderweb graph.



Step 2: Click on "Export to PDF" in the OPI Graph View panel.



Step 3: The OPI Results Report in PDF will download.

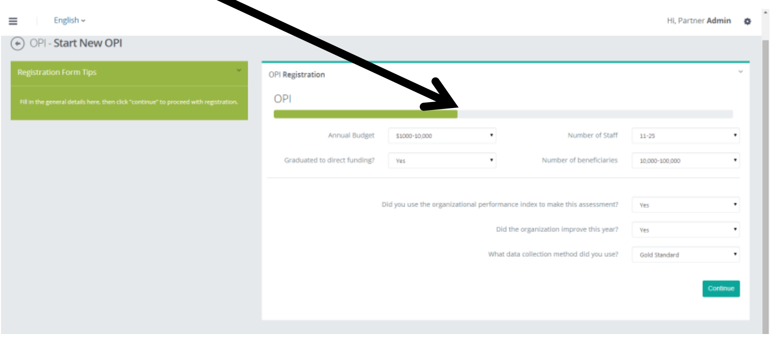


6.4. Starting a New OPI

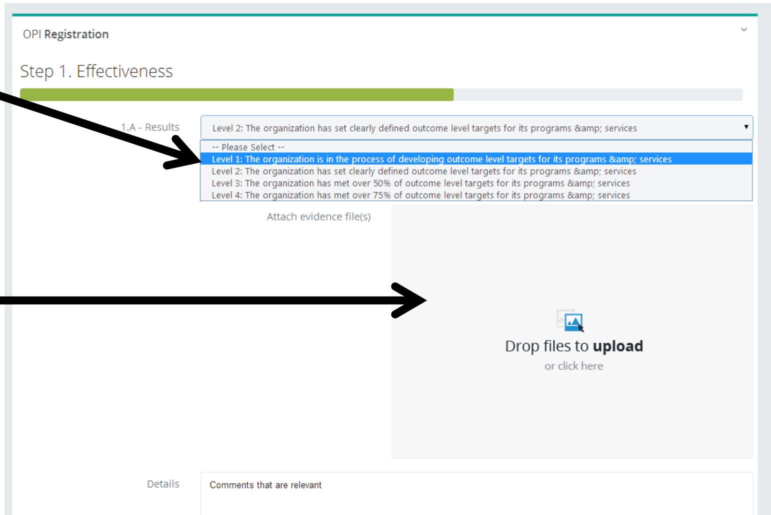
If you are starting a new OPI, please go through the following steps. You also can input the information via an MS Excel template for multiple years of data (see 6.5).

Step 1: Click on “Start New OPI” in the Navigational panel.

Step 2: Complete the OPI registration, then click “Continue”.



Step 3: Choose the level that most closely represents your organization’s current performance in each sub-domain.



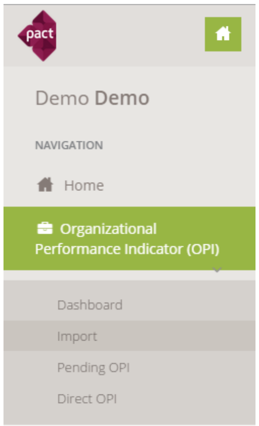
Step 4: Drag and drop evidence files for each sub-domain for Pact approval, and type in information about the file attached. When finished uploading all documents, click “Continue.”

NOTE: Please refer to the Pact OPI handbook for details on acceptable types of evidence for each level.

NOTE: OPI scores only will be available to view on the dashboard after the evidence has been approved by Pact staff.

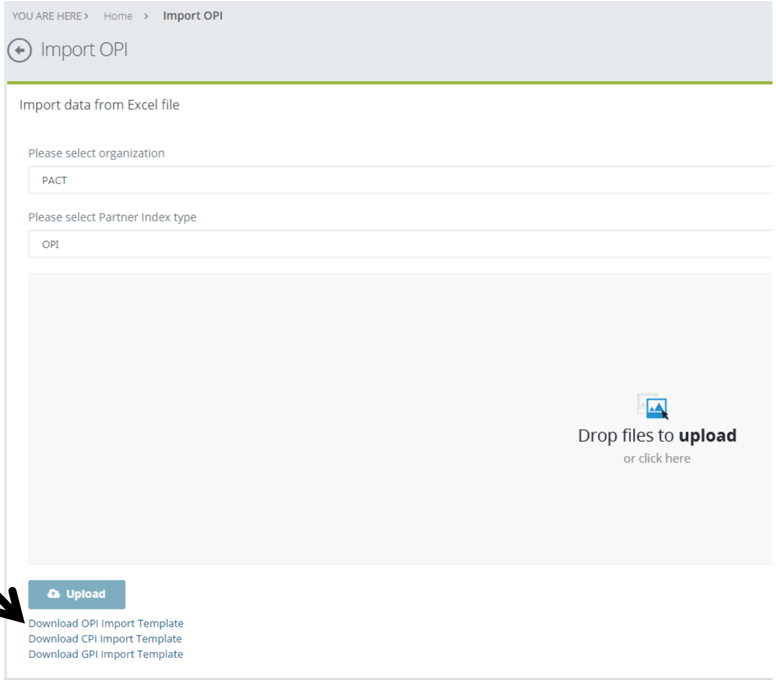
6.5. Input OPI Information via an MS Excel Template

If you are starting a new OPI or have OPI data for multiple organizations or years, importing information via MS Excel template may be easier.



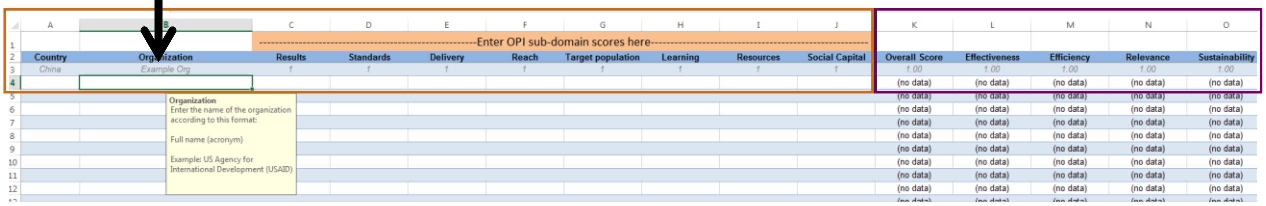
Step 1: Click “Import” in the navigational panel.

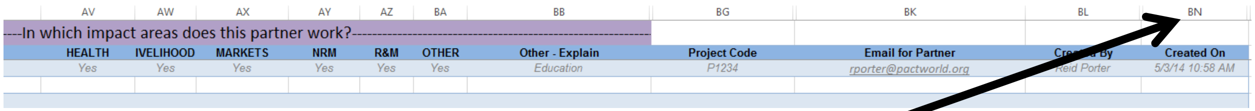
Step 2: Click to download and save on your computer the correct MS Excel template.



Step 3: Complete the MS Excel template, specifically row 4, columns A through J. If you click on a data box in the template, more information will appear to help you complete that box. Columns K through O will update automatically. Row 3 provides an example of what a completed row would look like.

Complete this section **Automatically updates**

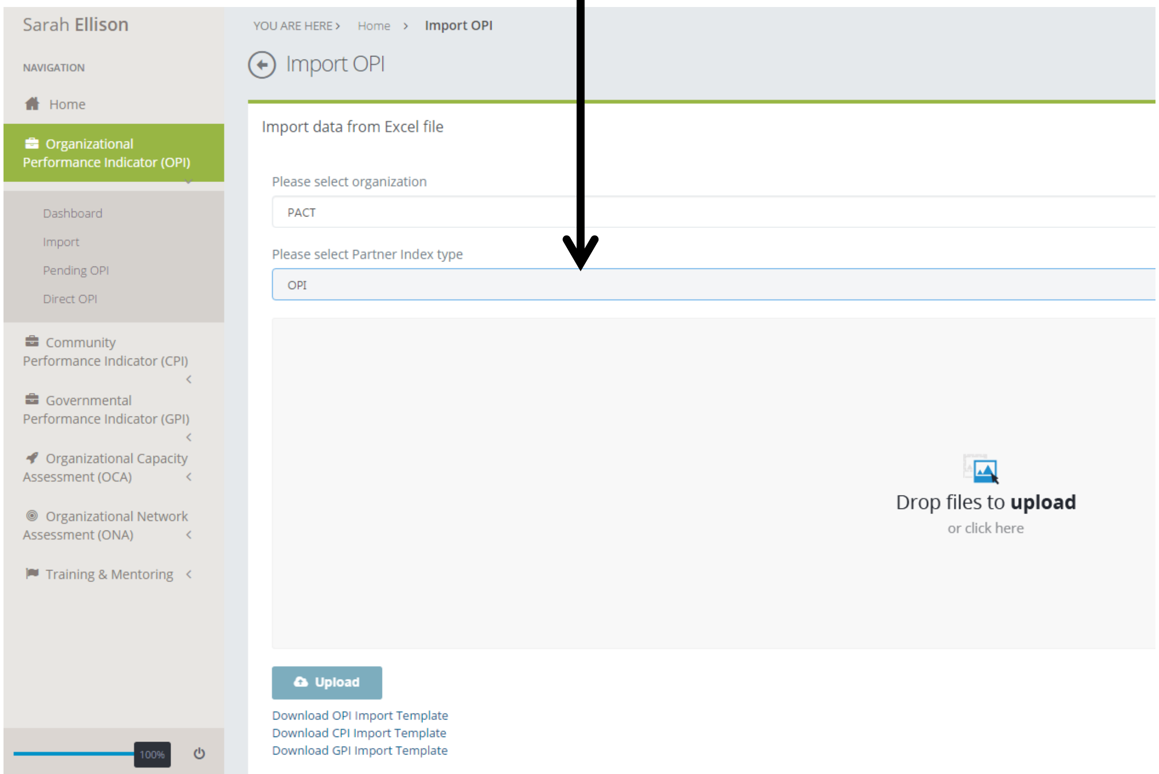




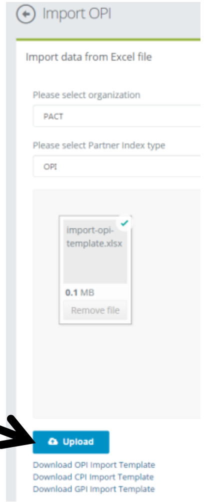
Step 4: Continue filling out the MS Excel template by scrolling to the right. "BN" is the final column.

Step 6: Return to the OPI Import Page, where you downloaded the template from (see step 1). Select the index type that you are uploading from the drop-down menu, then click to upload the complete MS Excel file. You also can drag files from your computer and drop them into this area.

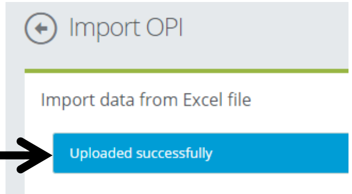
Step 5: You may include the OPI data for multiple years on the MS Excel template by starting a new row and entering the next year's information there. *Be sure that the name you enter for your organization in column B matches the name as it appears in the CSP.* The year of the assessment is the US government fiscal year which begins on October 1. Once you have completed the MS Excel template, save it to your computer.



Step 7: Once the file is saved to this screen, you must click the "Upload" button that has turned a dark shade of blue.



Step 8: Once you click "Upload," you will see a message at the top of your screen that reads "Uploaded successfully".



7. Working with OCA Data

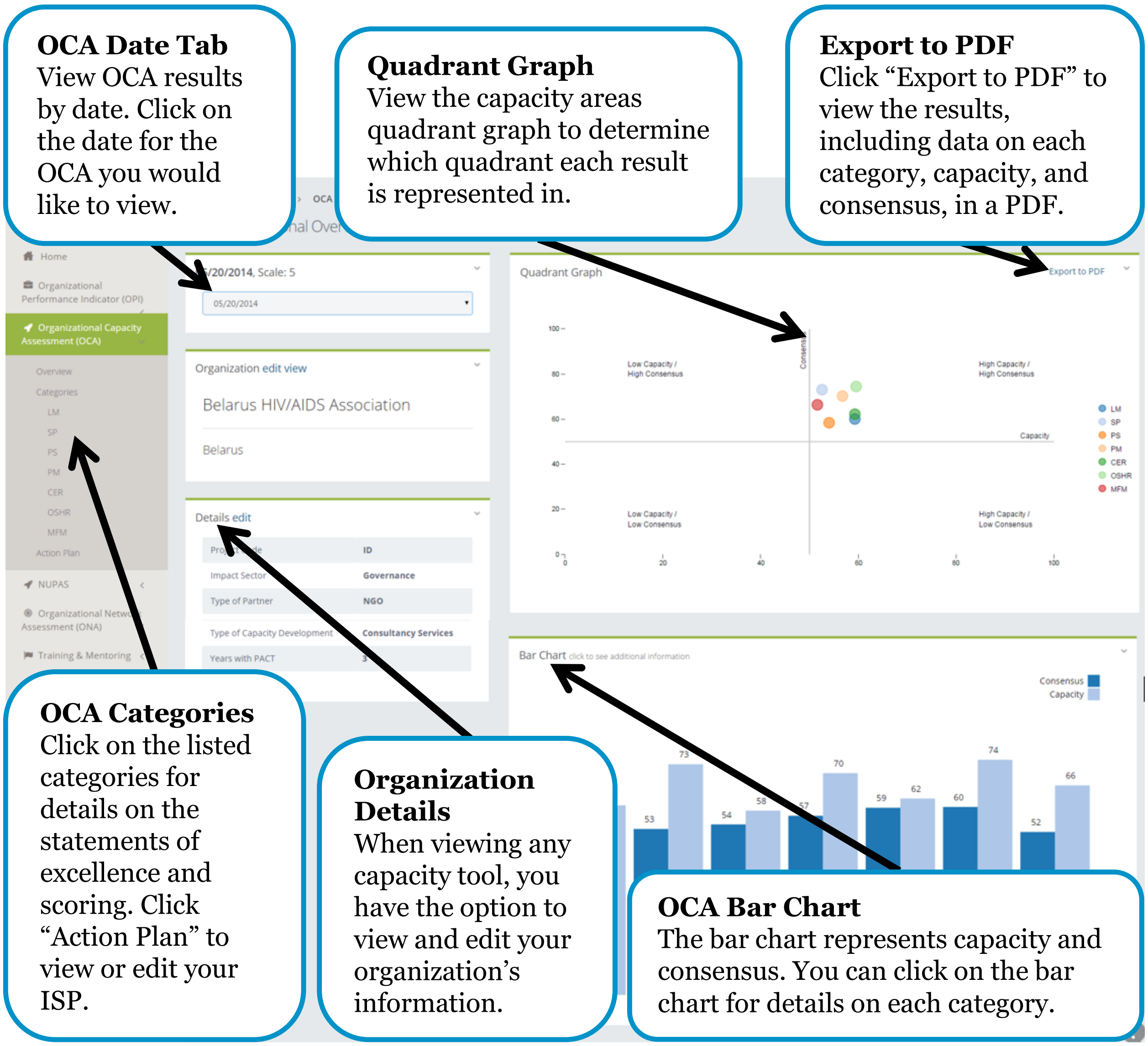
7.1. Introduction to the OCA

The Organizational Capacity Assessment (OCA) is a tool designed for use by both Pact and partner organizations to achieve three objectives:

1. Identify capacity development (CD) needs
2. Plan support needed by the partner
3. Monitor changes in organizational capacity by implementing and assessing Institutional Strengthening Plans (ISPs)

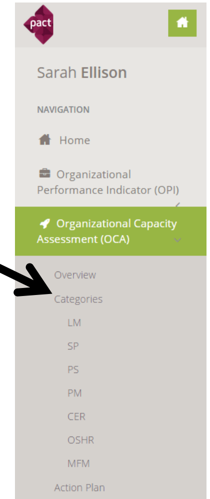
Capacity and consensus are two dimensions that are measured and discussed in the OCA process and that enable us to observe specific differences within and across organizations.

7.2. The OCA Dashboard

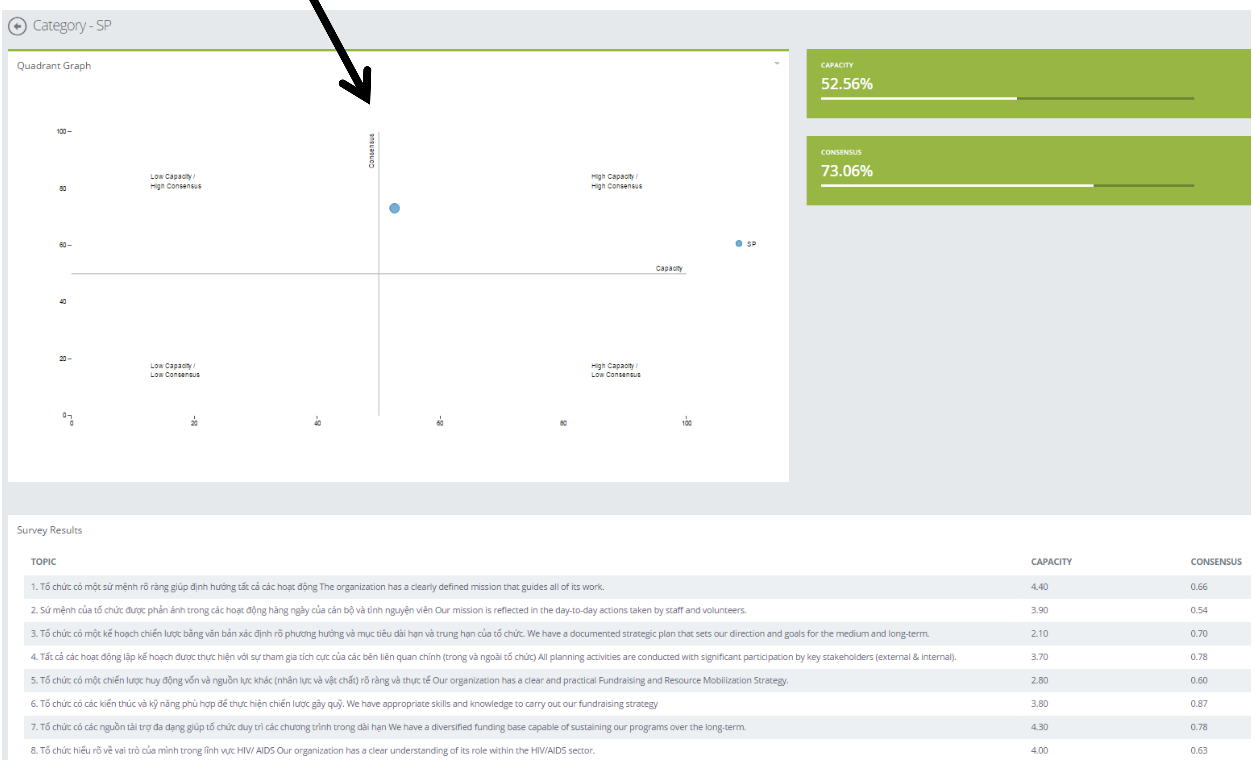


7.3. Viewing OCA Capacity Area Results

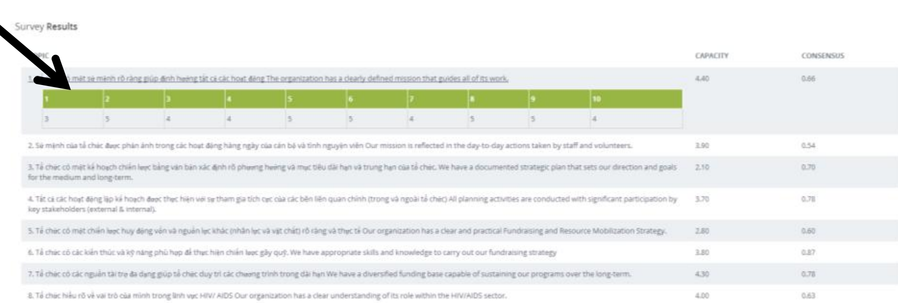
Step 1: Under "Categories," click on the specific OCA capacity area you would like to view.



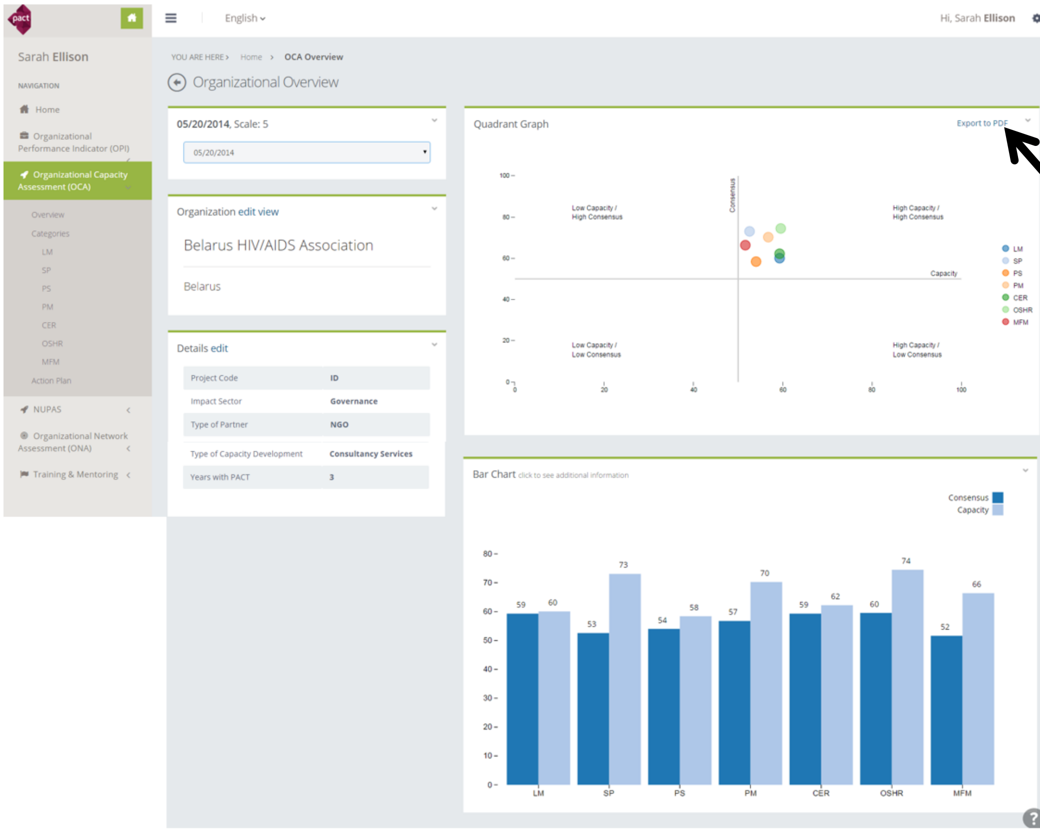
Step 2: View the individual capacity area's quadrant chart, overall capacity and consensus score, and each Statement of Excellence.



Step 3: Click on an individual Statement of Excellence to view each OCA participant's score.

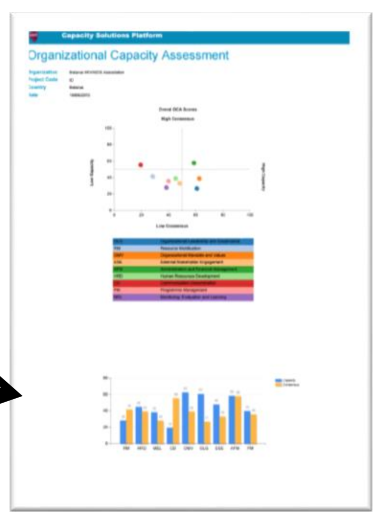


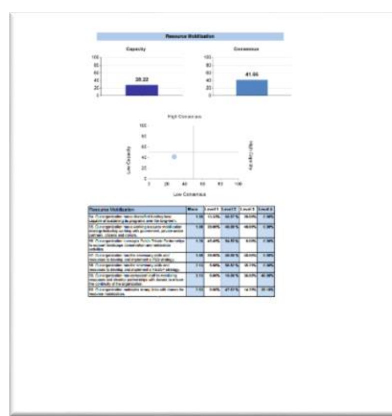
7.4. Exporting OCA Results to PDF



Step 1: On the OCA Overview page, click "Export to PDF."

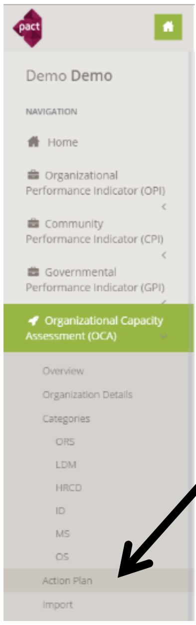
Step 2: The OCA report PDF will download and be ready for your needs, including the quadrant chart, capacity areas, and Statements of Excellence.





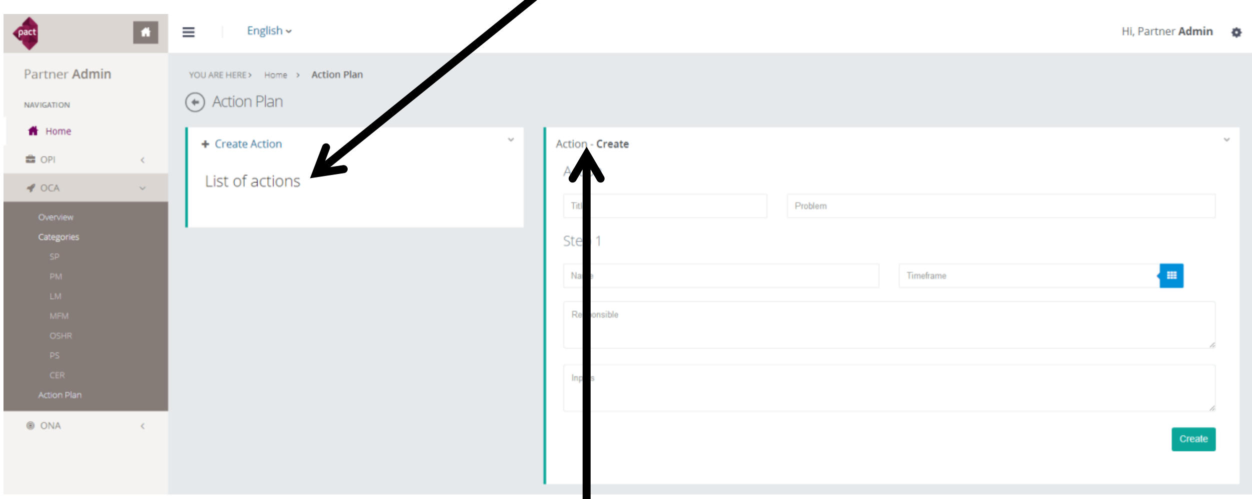
7.5. Creating an OCA Action Plan

Action Plan Overview



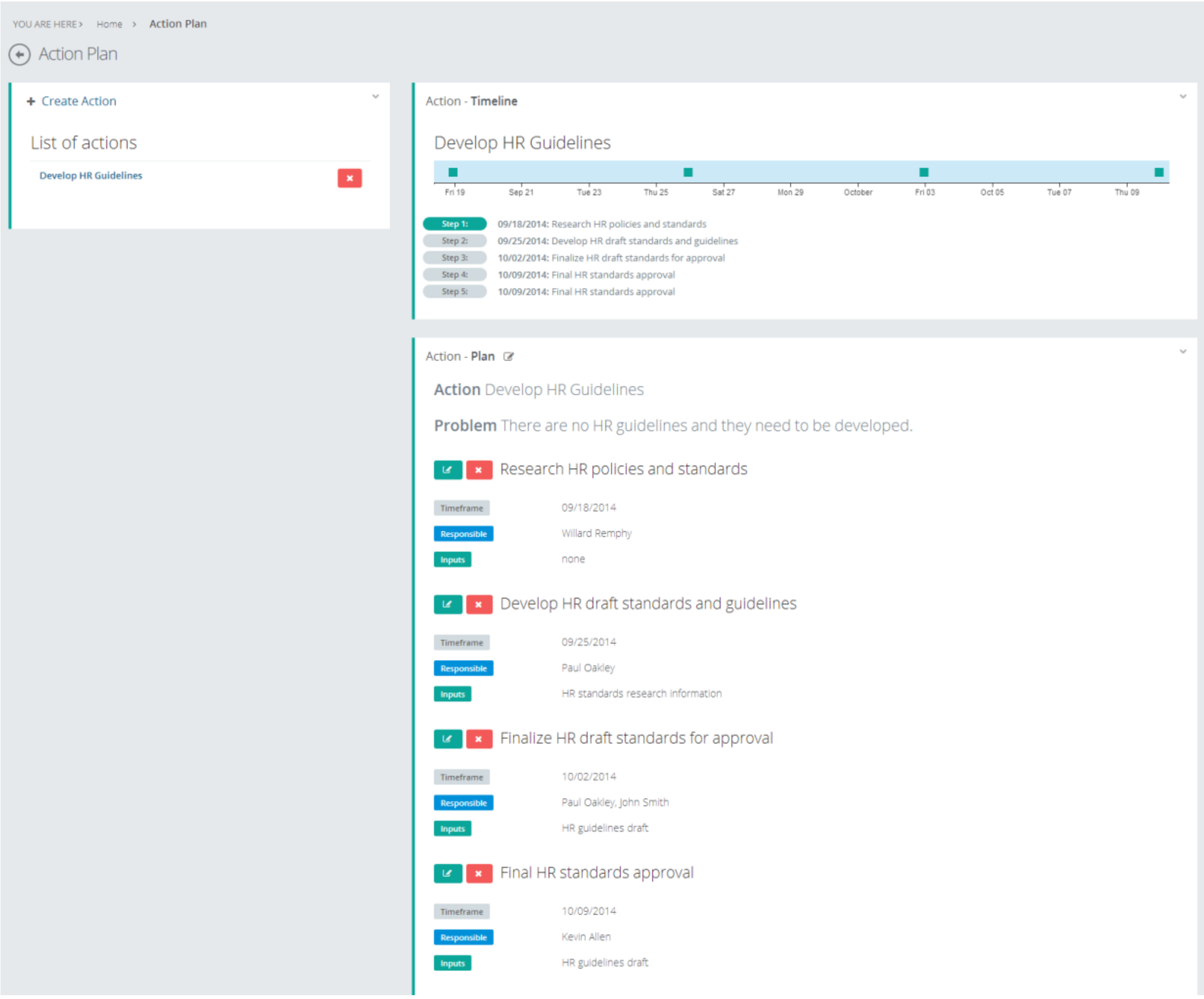
View and Create Actions
Click on “Action Plan” in the OCA navigation panel to view and create actions.

List of Actions Panel
This panel will show the list of actions created. You can delete and create actions from this window.



Create Action Panel
This panel allows you to input actions, their steps, each step’s timeframe, responsible persons, and needed inputs to complete the step.

Example of an Action Developed in CSP



NOTE: The action plan function is best used for short-term planning. Longer-term CD needs are likely better developed offline using the ISP.

8. Working with ONA Data

8.1. Introduction to the ONA

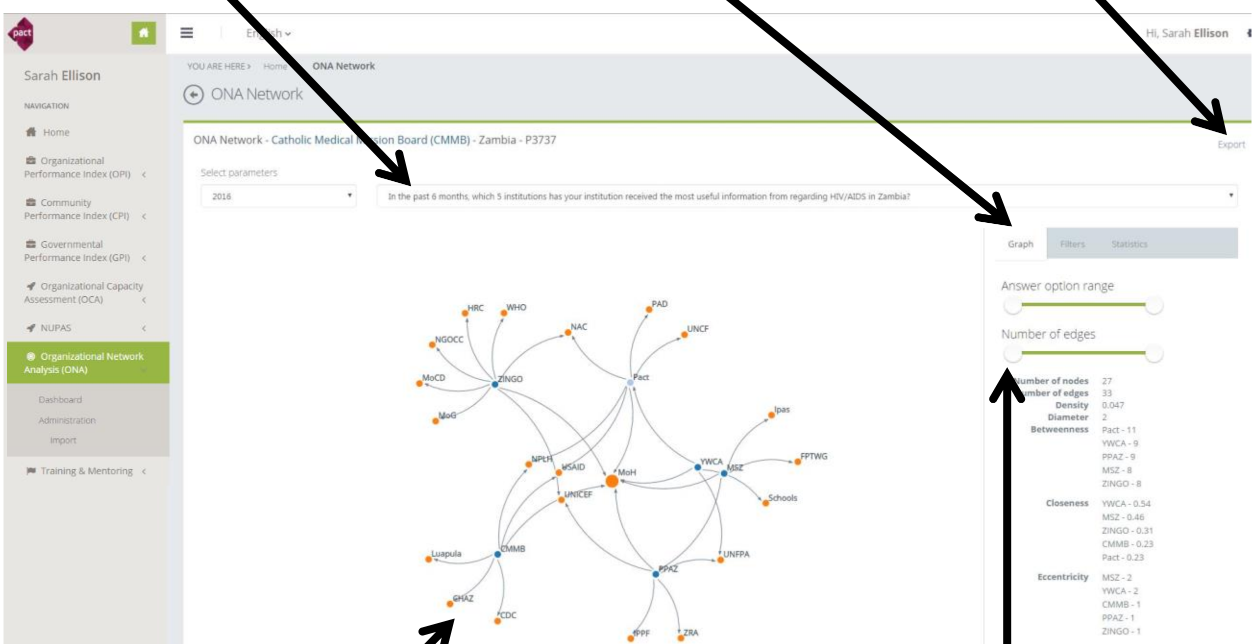
The Organizational Network Analysis (ONA) is a diagnostic tool that can be used with stakeholders to map a network, understand the relationships between different actors, and track the exchange of information and resources. The ONA can be used with virtually any group of stakeholders working in a particular area, from local health providers to business coalitions, even within different departments in an organization.

8.2. ONA Dashboard

Define the Map
Use the drop-down menus to select the year of the survey and the question results you want to view.

Graph Metrics Bar
Use ONA statistics to gain quantitative detailed information.

Export to PNG
Click “Export” then “Download” to save the image of the network.



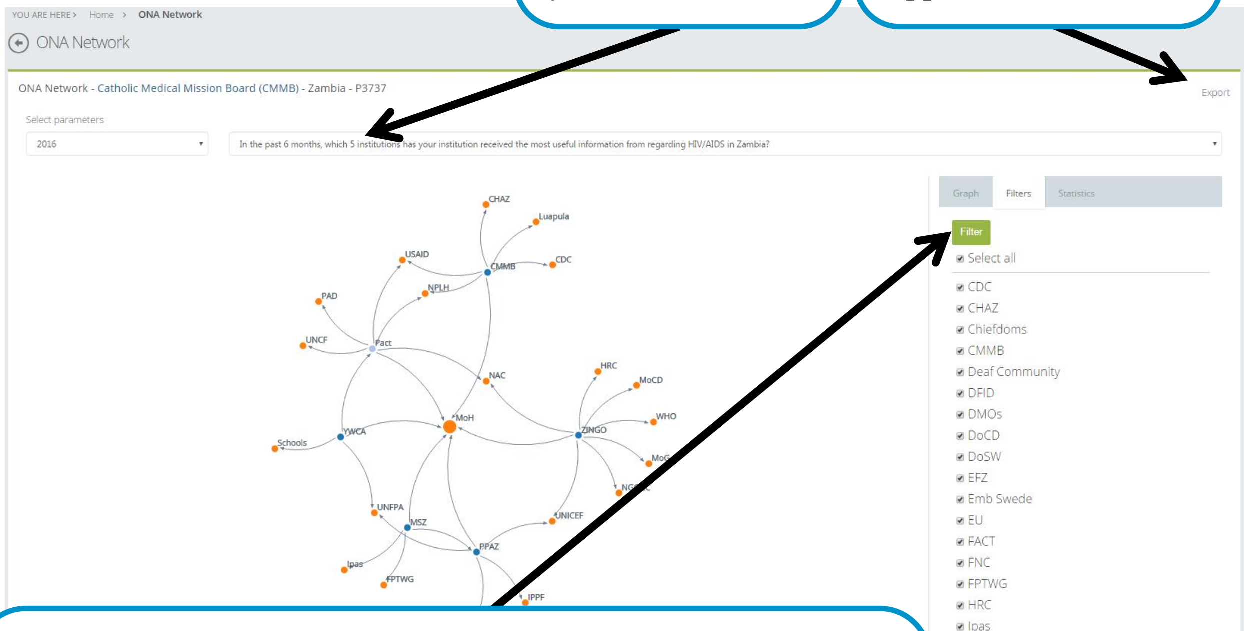
ONA Map
Observe mapped networks in a simple but effective form. Visualize patterns of interaction, identifying bottlenecks, redundancies, under-utilized resources, and information. To change the placement of the map on the screen, click the white space and drag the map. You also may scroll in and out of the map if your mouse is over the map and has a scroll function.

Define Response Ranges
Click and drag the circles of the answer options and number of edges to highlight different responses. The map and metrics bar will update automatically.

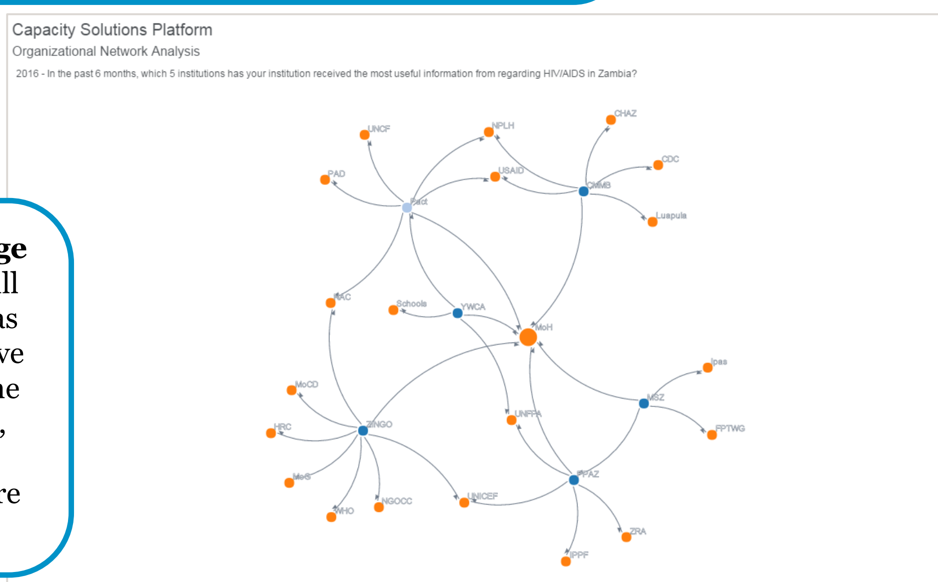
8.3. ONA Filter Tab

Define the Map
Use the drop-down menus to select the survey year and the question results you want to view.

Export to PNG
Click "Export" then "Download" to save the image of the network, which will appear in PNG format.



Filter Responders
Click the check box next to the name of a responder(s) you want to remove from the map, then click "Filter." The map will update automatically. If you want to include all responders again, click the box next to "Select all" so that the check mark appears, then click "Filter." If a responder has a check mark next to its name and you have clicked "Filter," it is represented in the map.



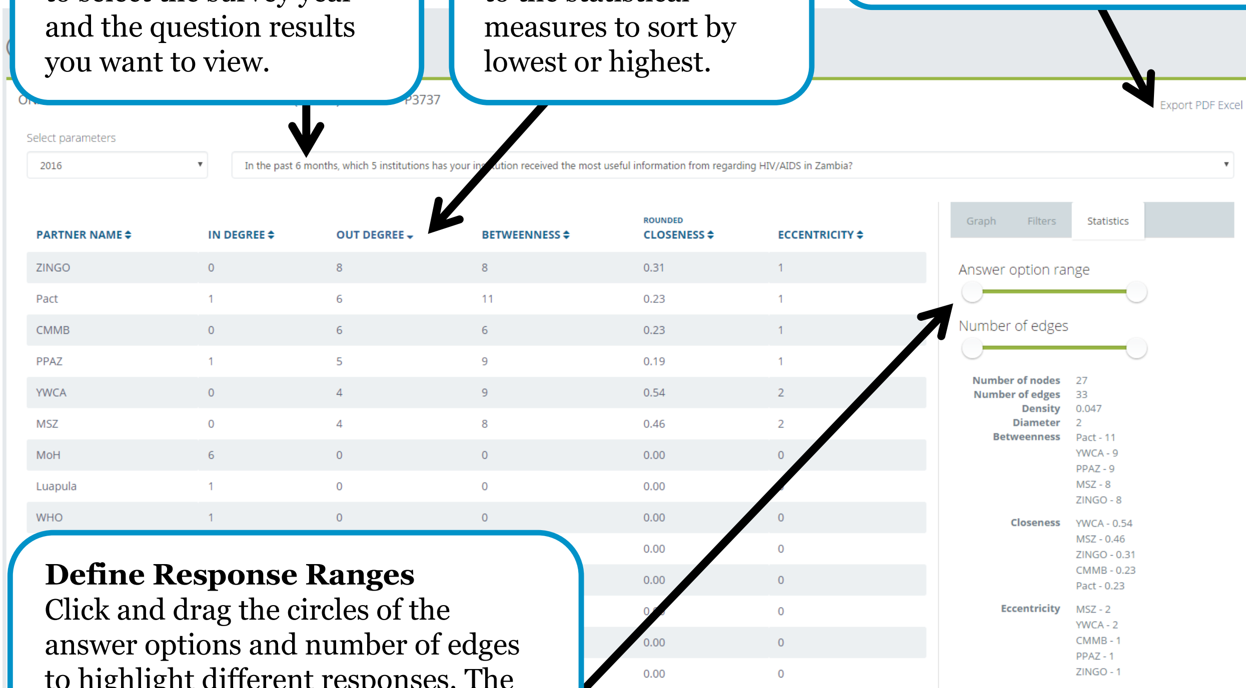
ONA Exported Image
The exported image will look like this once it has downloaded. If you have changed anything in the filter or answer ranges, click "Export" again to update the image before downloading.

8.4. ONA Statistics Tab

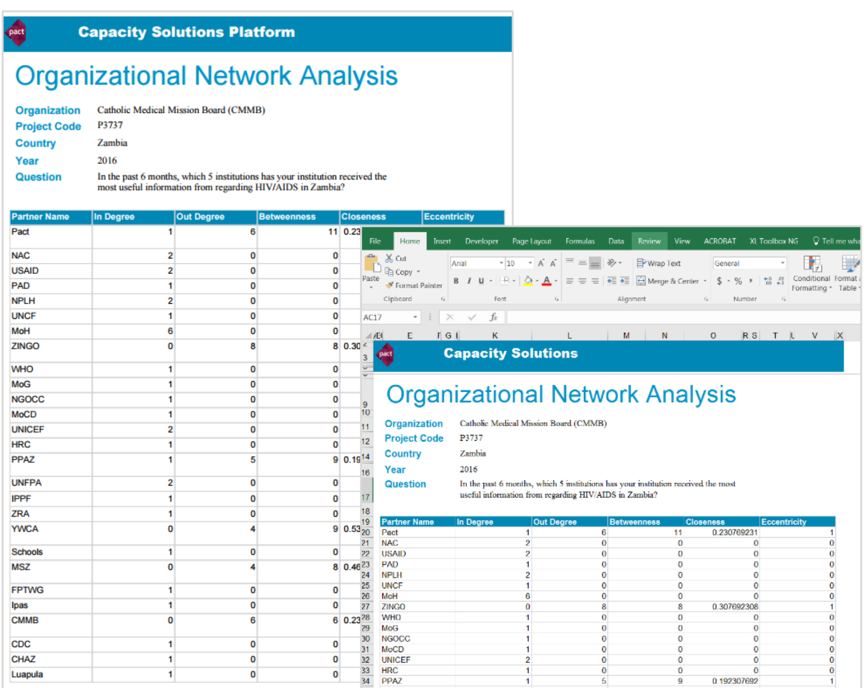
Define the Map
Use the drop-down menus to select the survey year and the question results you want to view.

Sort Statistics
Click the arrows next to the statistical measures to sort by lowest or highest.

Export to PDF or MS Excel
Click "PDF" or "Excel" to download the statistics on the screen in the format you prefer.



Define Response Ranges
Click and drag the circles of the answer options and number of edges to highlight different responses. The statistics and metrics bar will update automatically.



ONA Exported Statistics
The exported PDF and MS Excel statistics will look like this once downloaded. If you have changed anything in the filter or answer ranges, click "Export" again to update the statistics before downloading.

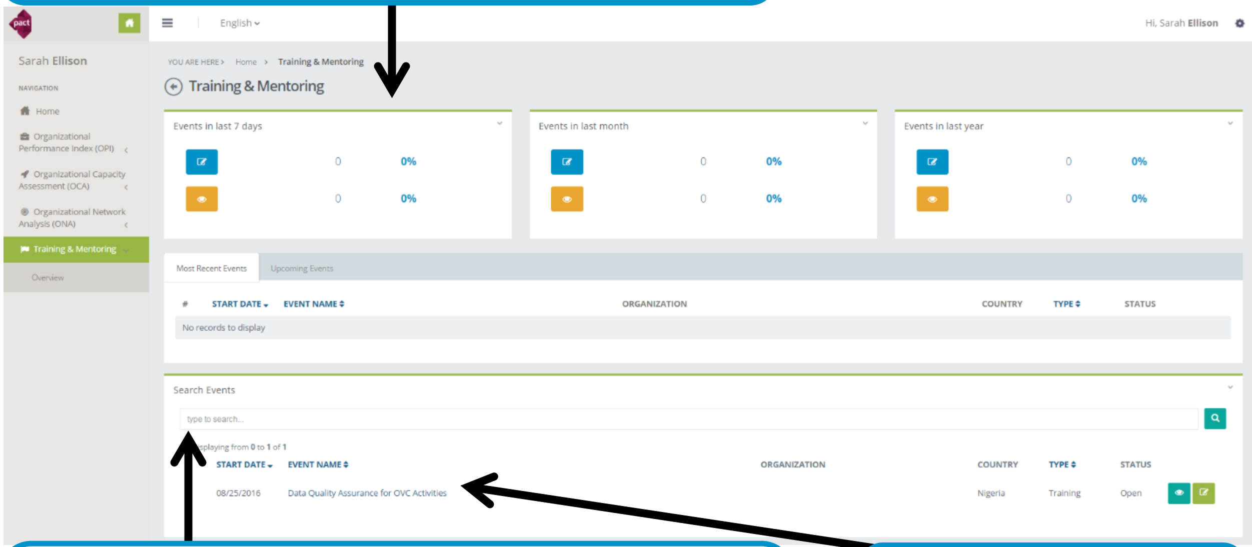
9. The Training and Mentoring Tracker

9.1. Introduction to the T&M Tracker

The Training and Mentoring (T&M) Tracker allows you to view details of events that your organization has participated or will participate in. This record can be used to highlight capacity development (CD) activities that Pact has provided your team over the course of your engagement.

9.2. T&M Dashboard

Summary of Events
View the total numbers of T&M events your organization has participated in over time.



Search Events
Type into the search box the name of a particular event, or click the arrows next to "Start Date," "Event Name," or "Type" to sort all T&M events.

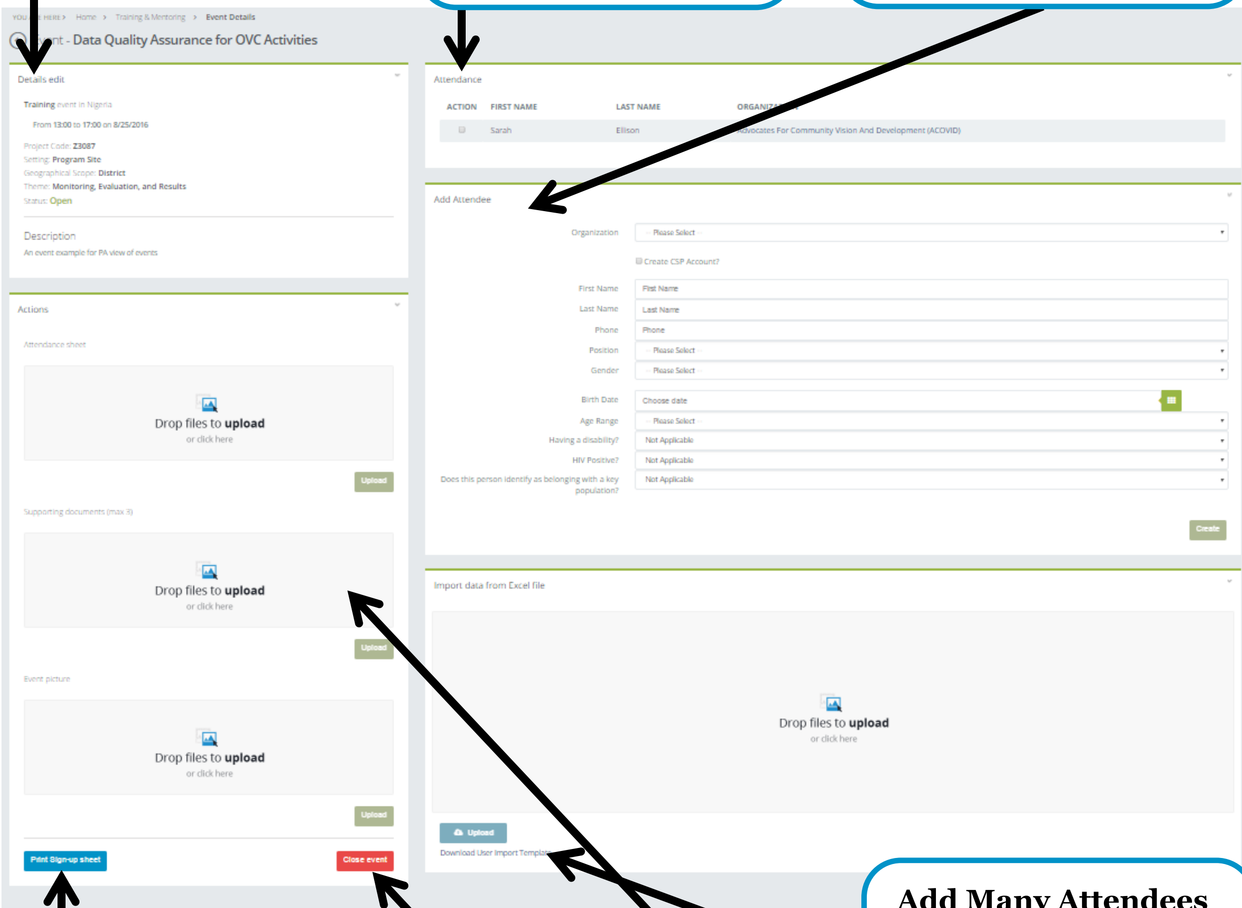
View Event
Click on the name of the event to view its details.

9.3. Viewing Open Event Details

Event Information
View the event's time, location, and description.

Mark Attendance
To confirm a specific person's attendance, click the box next to his/her name.

Add One Attendee
Complete the information in this box to add one attendee at a time. When completed, click "Create."



Add Many Attendees
Download and complete the User Import Template to add many attendees to an event.

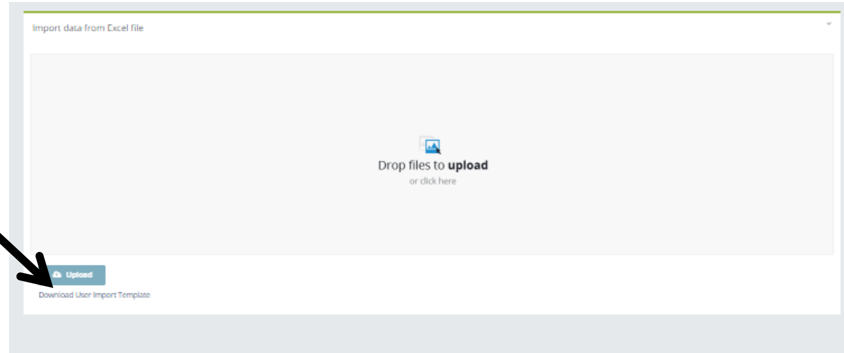
Print Attendance Sheet
Click "Print Sign-Up Sheet" to download a PDF of the attendees' names. When they arrive for the event, they can sign next to their names.

Close the Event
The information from the event is not recorded until the event is "closed." Click this button to close the event, but only after the event is complete. Once closed, an event cannot be edited, but can be viewed.

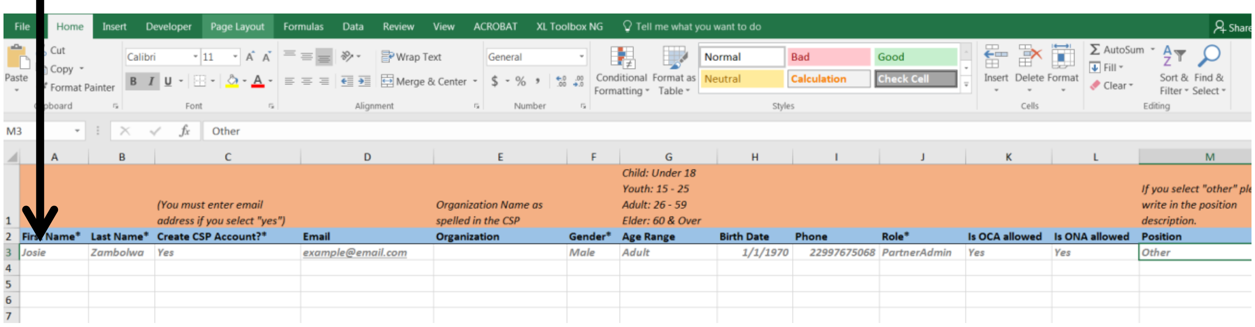
Upload Additional Files
You can add photos, agendas, notes, or any other type of document to the event. Simply drag and drop files into the box or click the box, select the file, then click "Upload."

9.4. Adding Many Attendees to an Event

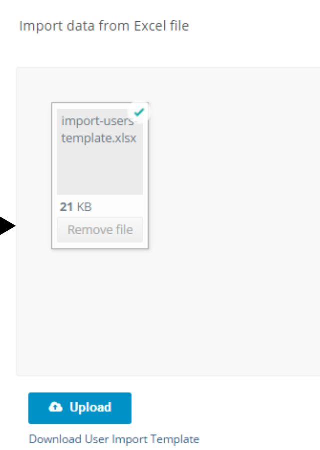
Step 1: When viewing the details of an open event, click “Download User Import Template” to save and open the MS Excel template.



Step 2: Complete the MS Excel template starting in row 4. Enter each new user in a new row. You must enter information for every column that has an *. The table continues to the right until column Q. You must include an email address if you plan to create a CSP account for the attendee. To link the attendee to your organization, you must spell your organization name exactly as it is recorded in the CSP.



Step 3: On the event details page, click on the box to select the attendance file, or drag and drop the file, then click “Upload.”



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