

# Participatory Organizational Evaluation Tool (POET)

Download at <http://www.undp.org/csopp/poet.zip>

## What is POET?

POET is an acronym that stands for Participatory Organizational Evaluation Tool. It's also two concepts rolled into one: a tool, and a process. As an organizational capacity assessment tool, CSOs (Civil Society Organizations) and their partners use POET to measure and profile organizational capacities and consensus levels in seven critical areas, and assess, over time, the impact of these activities on organizational capacity (benchmarking). As an organizational development process, CSOs and their partners use POET to build capacity by bringing staff together in cross-functional, cross-hierarchical groups for open exchange; to identify divergent viewpoints to foster growth; to create consensus around future organizational capacity development activities; and, to select, implement and track organizational change and development strategies

POET was developed in 1998 by Beryl Levinger of Education Development Center and Evan Bloom of Pact with assistance from the United Nations Development Programme and numerous CSO colleagues. Based on a methodology called PROSE (Participatory, Results-Oriented Self-Evaluation), POET focuses on the needs of a very specific user population, Southern CSOs and their partners.

## What is PROSE, the methodology behind POET?

PROSE stands for Participatory, Results-Oriented, Self-Evaluation, a new methodology for assessing and enhancing organizational capacities. PROSE is designed for use by service organizations, schools, and government units committed to dramatically improving their ability to promote significant, positive, and lasting change. PROSE is suitable for assessing capacity and catalyzing organizational change in relation to such concerns as: practices related to exceeding customer expectations, organizational effectiveness in achieving mission, community participation, equity, decentralization, and managerial effectiveness.

The following steps outline the PROSE methodology:

- Critical organizational capacities are identified in relation to a potential user population
- Items are created to measure the critical capacities
- Facilitators are trained
- The tool is applied
- Scores are tabulated
- Scores are reported
- Capacity-building efforts are launched

Using the PROSE methodology, POET is designed to:

- Promote organizational learning and capacity-building among CSOs
- Assist CSOs in strengthening their local partners
- Enable UNDP to track the impact of its support to CSOs
- Facilitate communication and information-sharing about capacity-building within the CSO community

## **The Role of the Cohort in PROSE**

A cohort is composed of organizations that want to improve performance, want to engage in deep organizational learning, and are open to change. Although most cohorts are comprised of organizations in related fields, what's most important is that cohort members agree, a priori, in general terms what issues they intend to focus on (e.g., quality of customer service; operational efficiency; the quality of linkages and partnerships with other institutions). Additionally, the cohort concept enables PROSE users to benchmark their organization's performance against a wider group of like entities in order to accelerate progress toward goal achievement. A cohort data manager and member organizations may choose to employ internet technologies to maintain anonymity, report results or facilitate communication among cohort members in different geographical areas. Cohort creation is intended to foster a network of innovative organizations that can lend support to one another as they pursue their individual change efforts.

## **Using PROSE without a Cohort**

PROSE may be used to address the needs of a cohort, but it is also designed to assess and enhance the capacity building of a single organization. Organizations that are not part of a cohort will not be able to study their scores in comparison with peer organizations for benchmarking purposes. However, individual organizations can still engage in the analysis of absolute and relative scores generated through the PROSE methodology and utilize companion tools.

## **How POET works**

This POET Manual is designed for three different types of users; a CSO as part of a cohort, a cohort administrator, or an independent CSO. The manual makes reference to three distinct entities:

- The POET Assessment Team - the participants in the POET session and review of the results
- Scoring Team - the team charged with tabulating POET results
- (In the case of a cohort) Cohort Data Manager - The entity responsible for tabulating the cohort's score sheets, and reporting the individual CSO and cohort results.

An CSO wishing to apply POET either independently or as a member of a cohort, would:

- Establish a cross-functional, cross-hierarchical organizational capacity assessment team.

- Select a facilitator trained in POET's methodology.

During a POET capacity-assessment session, team members alternate between group discussion and individual reflection as follows:

- The facilitator leads the assessment team through a set of two to four discussion questions about "critical incidents."
- Team members reflect independently on the discussion by responding anonymously to statements that can be answered using Likert-type scales ("strongly agree-strongly disagree").
- This sequence of group discussion and individual reflection is repeated until the group completes all 100 POET questions which usually takes five to six hours.

After the POET capacity-assessment session:

- Results are scored and profiled using a variety of reporting formats and POET companion tools.
- Additional capacity- and consensus-building work is planned based on POET results.

## **How POET is unique**

POET was designed as a robust, easy-to-use assessment process that efficiently and effectively assists CSOs and their CSO partners in achieving meaningful, lasting change. POET differs from other organizational capacity assessment tools in several ways. It:

- uses a "critical incident" technique to focus group discussion on common data which bolsters reliability and validity.
- includes a consensus dimension that measures diversity of opinion among team members to enrich organizational analysis and encourage capacity-building through the analysis of divergent viewpoints.
- offers companion tools that help participants to apply their POET results to the design of change initiatives that are firmly rooted in organizational realities.
- employs advanced statistical techniques to ensure construct validity and reliability.
- is easy to administer (relatively little facilitator training is necessary for effective results)
- models of sound organizational learning processes that serve as a springboard for capacity building (i.e., POET is simultaneously a tool for measuring and building capacity)

In addition, when used with a cohort of peer organizations, POET:

- enables users to benchmark individual organizational results against a cohort of peer organizations.
- uses the Internet where appropriate to foster communication among CSOs concerning POET findings and results as well as capacity -building efforts within the CSO community

## What POET measures

POET produces two kinds of measures, a capacity score, which indicates how an organization perceives its strengths and weaknesses with respect to the capacity areas, and a consensus score, which indicates the degree to which assessment team members agree on their assessment of organizational capacity. These two scores reflect the key concept underlying POET: meaningful organizational development occurs at the intersection of two processes--identifying perceived organizational strengths and weaknesses and exploring differences of opinion regarding these perceptions.

The seven capacity areas measured by POET are:

Capacity Area	Focus
Human Resource Management	staff development, recruitment, compensation (salary and benefits), personnel evaluation, and grievance and conflict resolution
Financial Resource Management	budgeting, forecasting, fundraising, and cash management
Equitable Participation	field-based program practices related to project access and project benefit
Sustainability of Program Benefits	the impact of environmental, economic, political, institutional, and cultural factors
Partnering	collaboration with other CSOS, donors policy makers, and private sector entities
Organizational Learning	teamwork, information-sharing and capacity for generating information that leads to improvement of current practice
Strategic Management/ Governance	board practices; planning practices; and, commitment to goals, mission and philosophy