dmoc

DIAGNOSTIC AND MONITORING
OF ORGANIZATIONAL COACHING

MANUAL FOR **ASSESSORS**

USAID FROM THE AMERICAN PEOPLE

amea

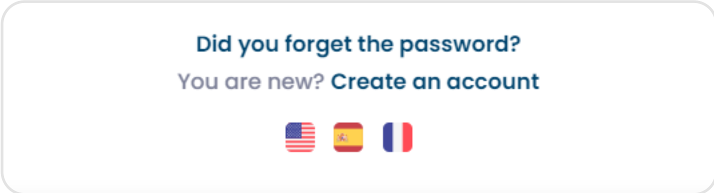
NCBA CLUSA
National Cooperative Business Association • CLUSA International

Content

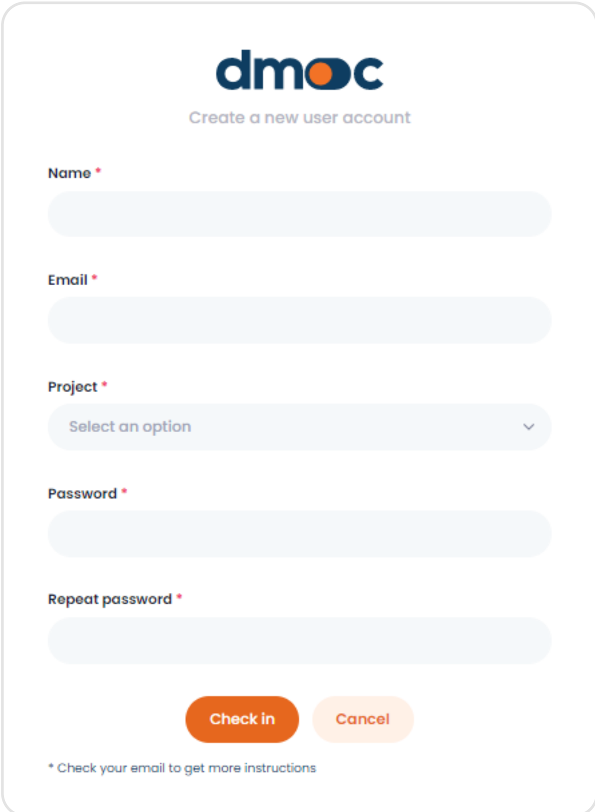
Content

1 Creating a user account

To create a new user account enter the web address **dmoc.businessschool.coop** and click on the "Create an Account" link



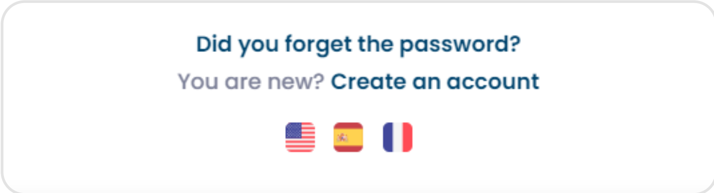
Next, the form for creating a new user account will be displayed, as indicated in the following image:



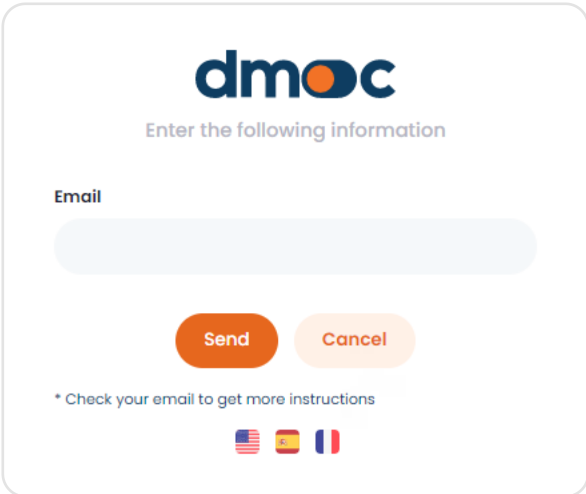
Enter the data requested: Name, Email, Project, Password (greater than 8 characters). After pressing the "register" button, check your email where you will get more information. **It is necessary for an "administrator" to activate their account and/or assign a role to be able to use it.**

2 Password recovery

Enter the web address **dmoc.businessschool.coop** and click on the link “Forgot password?”.

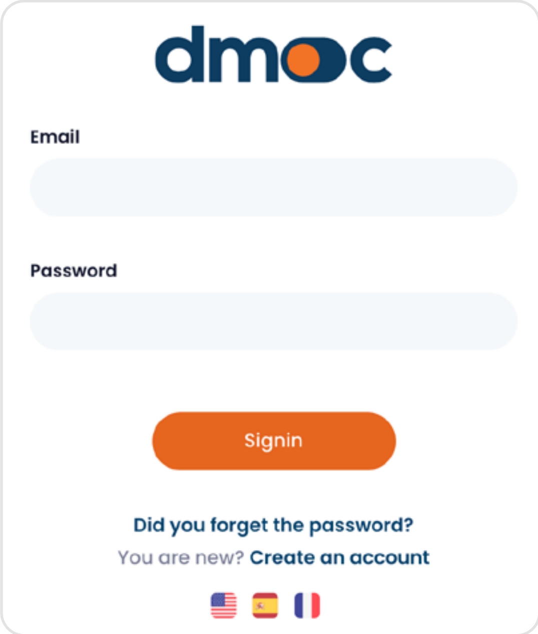


Next, the form for recovering a user account will be displayed, as indicated in the following image:

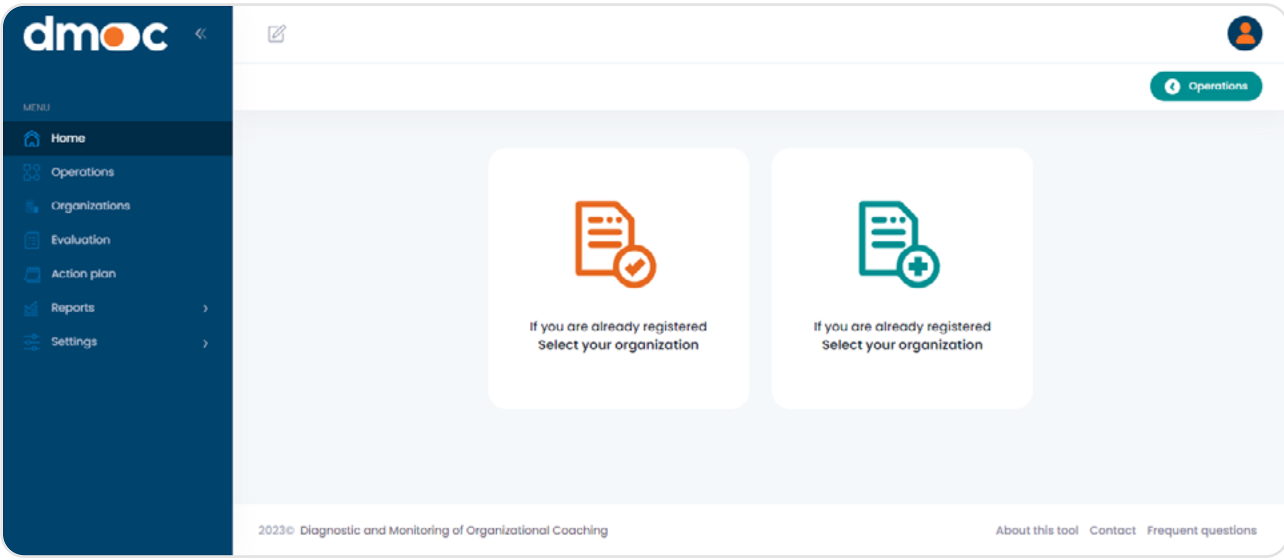


3 Login to the application

To access the application enter the web address **dmoc.businessschool.coop** with the username and password. It is necessary to have your account activated. This operation is done by an administrator. Then the following form will be displayed:



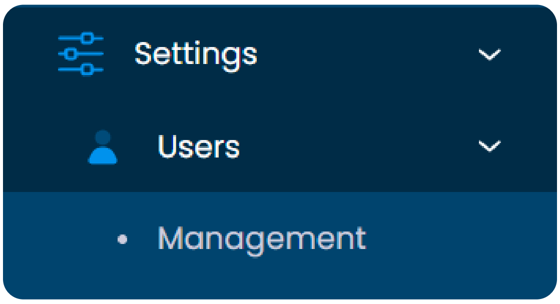
After pressing "enter" the following screen will be displayed where you can choose or create a new organization (topic to be seen later) on which you want to work:



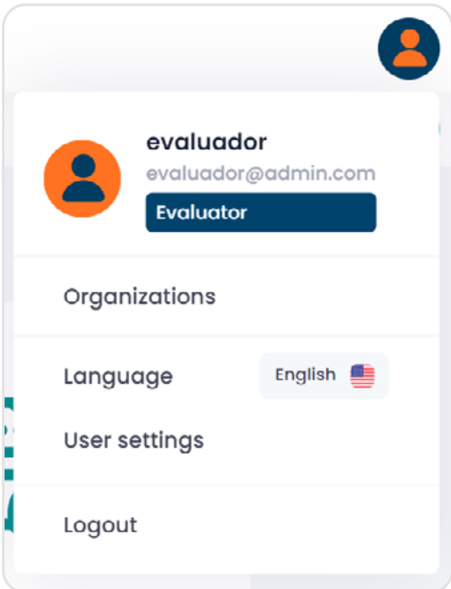
4 Managing your user account

4.1. Modify your user data

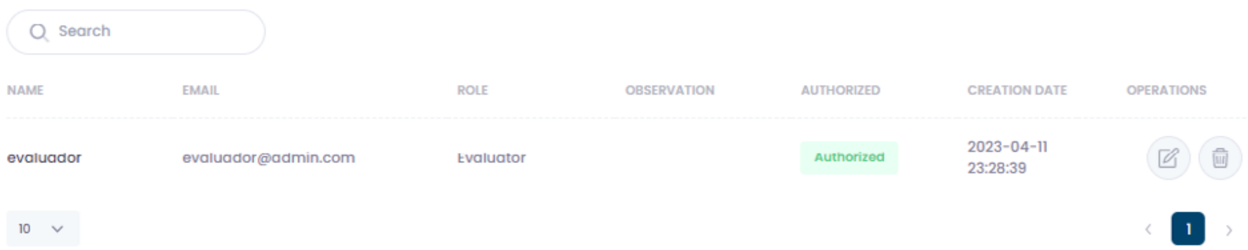
Access to modify your personal data email through the main menu, section of “Configuration / Users / Management”



It is also possible to quickly access through the icon on the upper right side of the application where the quick options for the user are located:



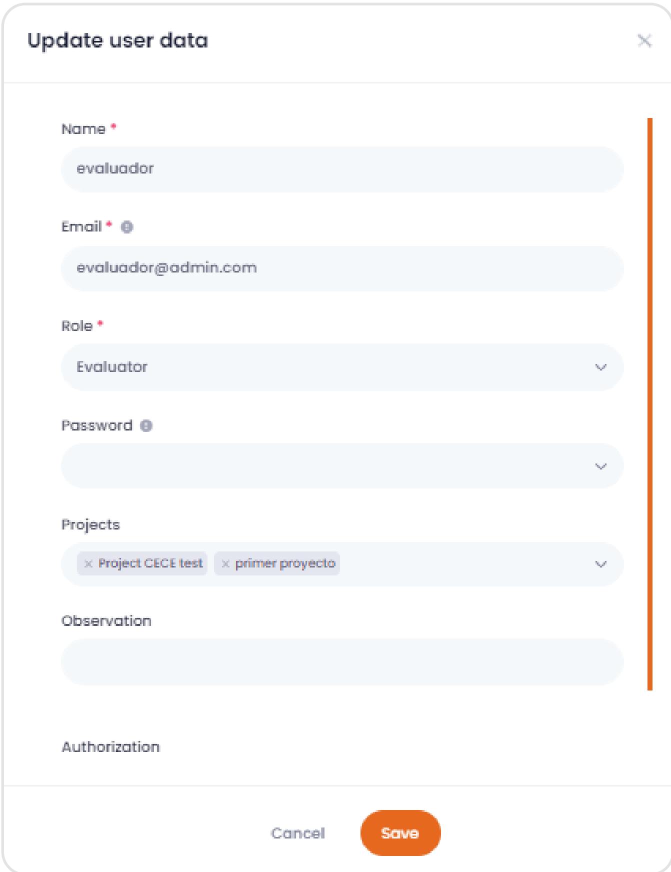
When accessing via the “User Settings” option in the menu in the upper right corner, or via the “Users” option in the main menu, a list will be displayed with the user name:



4 Managing your user account

To modify the user data press the next button: 

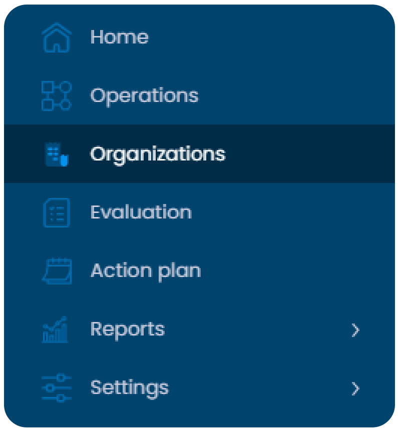
Then, the following form will be displayed where you can make the modifications that you think are necessary. **Password modification is optional: if you do not want to change the password, leave that field empty. An assessor user cannot change the project(s) to which he/she has been assigned by an administrator.**



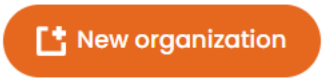
5 Organizations Management

5.1. Creating a new organization

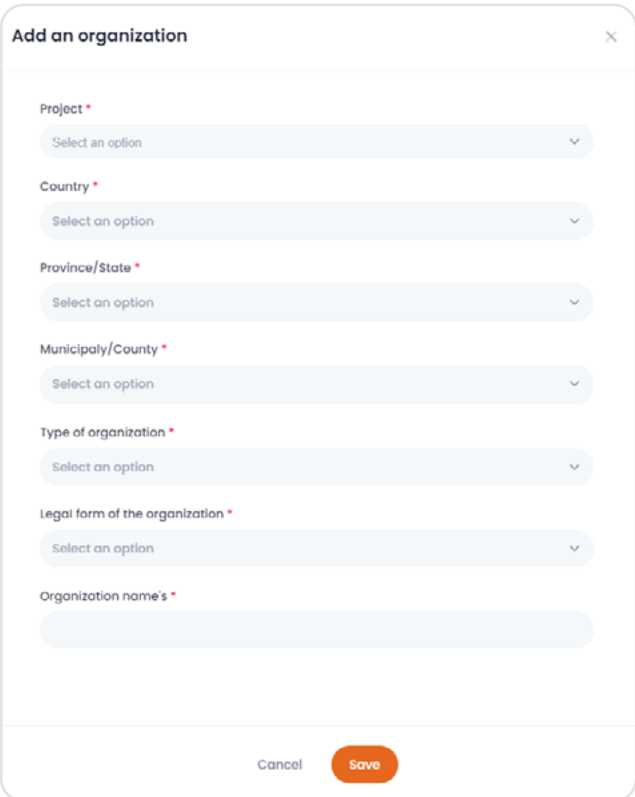
An assessor user can create one or more organizations, which will be automatically assigned to this user. To do this and to be able to manage them, enter through the main menu on the left side to “Settings / Organizations / Management” where you can create and edit the information related to the organizations as indicated below:

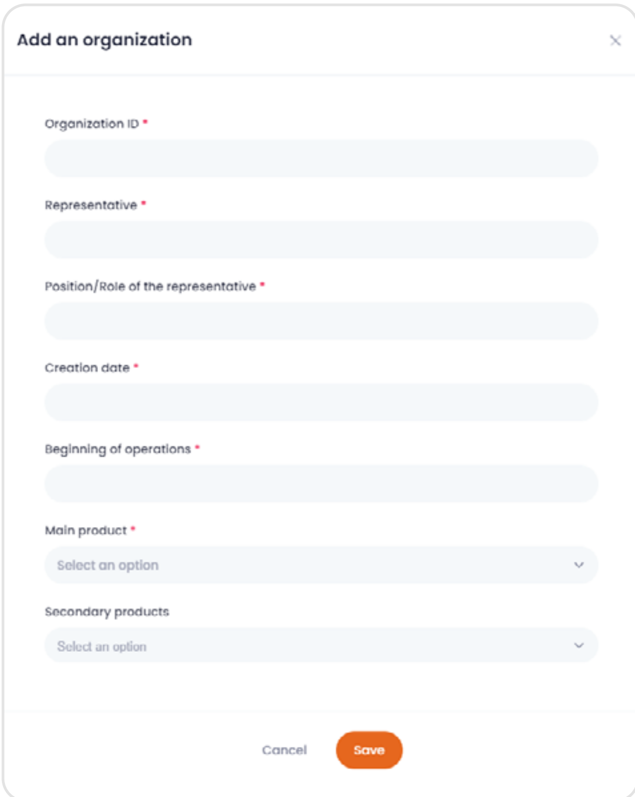


To create a new organization press “New Organization”:



Then fill in the details of the form that will appear as in the following image:





It is important that the project is selected correctly in the project field, which should be one of the projects assigned to your user (as it appears in your user information). If in doubt, ask your administrator.

5 Organizations Management

The following describes all the fields that are required:

Projects

They represent the different projects that are developed according to their characteristics, scope or field.

Country

It's the country where the organization is located.

Province/state/region

Represents the province, state, region or other similar of the country where the organization is located.

Municipality/county

Represents the municipality, county or similar that is part of the province, state or region where the organization is located.

Type of organization

It represents a type of organization (primary or secondary cooperative integration organizations or others).

Legal form of the Organization

It represents a legal form that will be assigned to an organization (joint stock company, association, grassroots cooperative or others).

Name of the organization

Name of the organization, legal and/or representative name.

Organization ID

The organization's legal registration number, may be the same as the organization's tax registration.

Representative

Name of the organization's main representative.

Representative's position

Name of the role or position of the organization's representative.

Start of operations

Foundation date related to the start of an organization's operations.

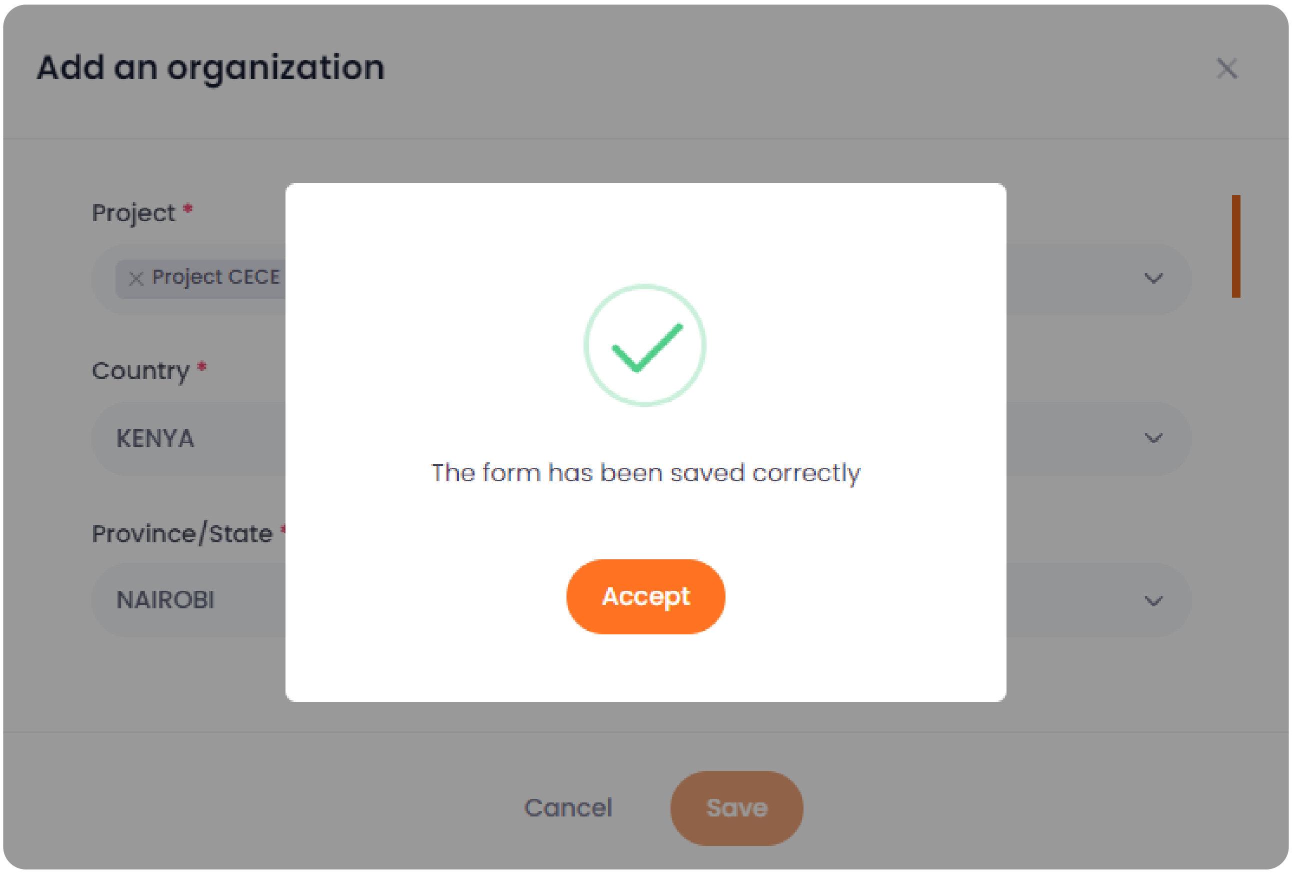
Main product

The main product or service developed by the organization.

Secondary products

If you have more than one product or service, you can optionally select this field.

After saving the form you will see an approval message:



5.2. Updating an organization's data

To update or edit the data of an existing organization, you must be in the "Organizations" menu option where the list of organizations appears. Click on edit to the right of the name of the organization whose data you want to update, and a form similar to the one that appears to add a new organization will appear. If you want to assign this organization to another project, you must add this one in the Projects field.

5.3. Deleting an organization

To **delete an organization** it is necessary that it not have any assessment, then press the following button:

6 Assessment management

An organization may have none, one or several assessments. Generally, an organization is evaluated with the same assessment template with a certain frequency (usually annual), in order to monitor its development and co-draft a corresponding action plan (together with the organization).

6.1. What you should know before starting an assessment

The assessment should be participatory and inclusive of different members of the organizations. Therefore, it is important to plan the meeting well in advance, to: 1) ensure the presence of key members for their knowledge and different points of view or perspectives, and 2) ensure that they are collecting and have quantitative information available required for the assessment.

The assessment should be carried out in a workshop format where not only the top managers (president, administrator or manager), but the largest number of members in the organization's governing bodies participate. In addition to the board of directors or Administrators council, and management, it is vitally important that the members of the supervisory, auditing or internal control board participate. You can invite as many members of the organization as you consider. It should only be borne in mind that the answers to the qualitative questions of the assessment questionnaire should be selected in such a way as to represent the consensus of the workshop participants, so, usually, a group of more than 15-20 people can delay the assessment process.

To facilitate the completion of the questions, they are subdivided into dimensions. A dimension is a logical subset of the assessment questionnaire questions that groups related questions by subdividing them. Each dimension consists of qualitative and quantitative questions.

The assessment process has several steps:

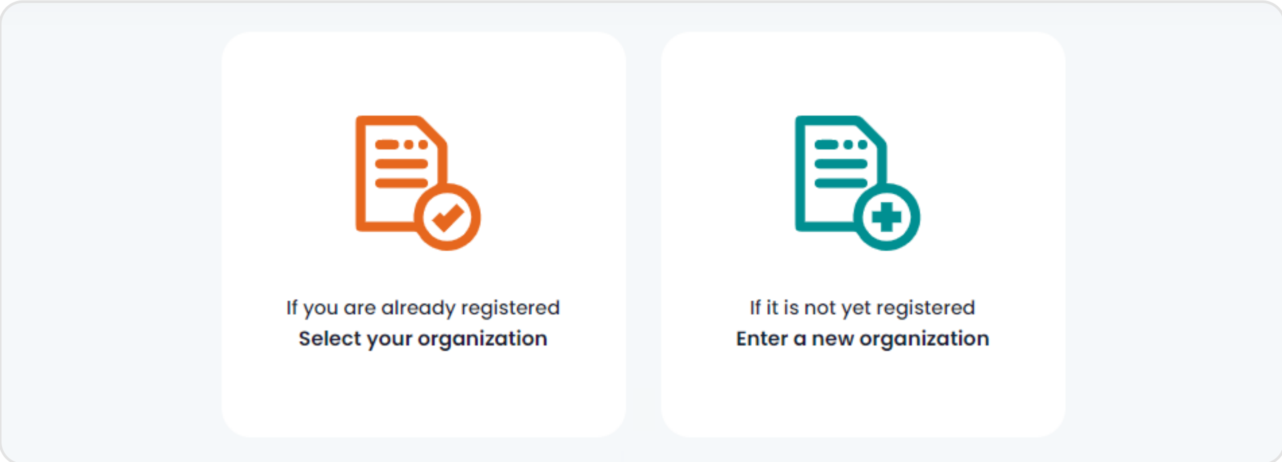
1. Select an organization to be evaluated. If it has not been created or registered, the organization must be entered or added. In addition, if the organization has been created by another user, it must have been assigned to its assessor user by an administrator user.
2. Before creating a new assessment, please make sure that this assessment has not already been created by reviewing the list of assessments of those organization, as explained below.

3. If you are going to take the assessment in a location without internet, you should *before going to that location while you have internet access*, add or start the assessment and download or export it so that you can fill it offline, as explained below. Even if you are going to take the assessment at an internet location, it is advisable that you create it in advance and let the organization know the information that you will need to collect in order to fill in the fields with quantitative information.
4. The assessment must be carried out in a participatory and inclusive way, as explained above. The time it takes to complete the assessment will depend on the time it takes for the members of the organization participating in the assessment workshop to reach a consensus on the answers to the qualitative questions of the assessment. Assessment templates should be designed to take no more than 4-6 hours.
5. At the end of each dimension, the quantitative data should be used to triangulate the answers to the qualitative questions of the evaluation, because the quantitative information should be checked and not contradict the answers to the qualitative questions. In case of contradiction, the interviewees should be noted and the qualitative or quantitative answers should be corrected, as appropriate.
6. The assessment can be paused at any time. Even if all the qualitative and quantitative questions of all dimensions have not been answered, you can see the results and even create an action plan for the development of your skills and improvements in your performance.
7. After the assessment is completed, the results should be shared with the organization to then move on to the development ofthe action plan, as explained below.

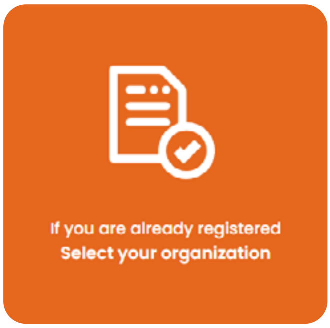
6.2. Selection of the organization to be evaluated

Go to the main screen or home of the application using the main menu:

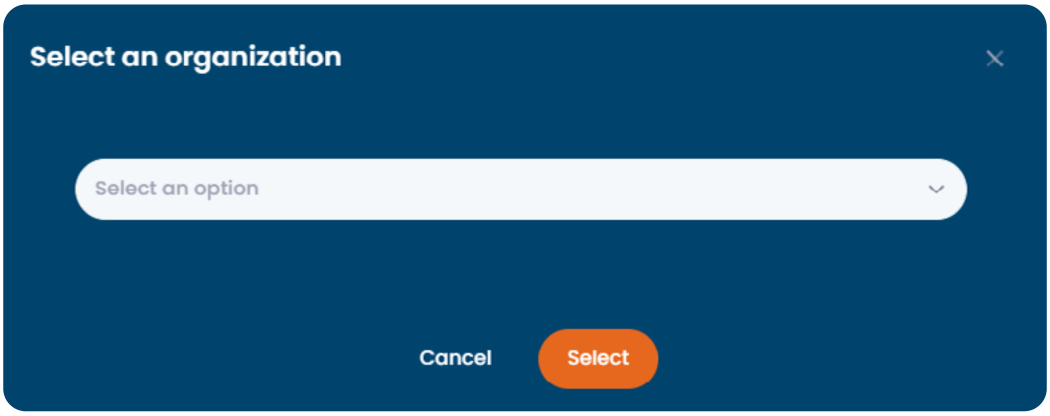
Then the following two options will be displayed:



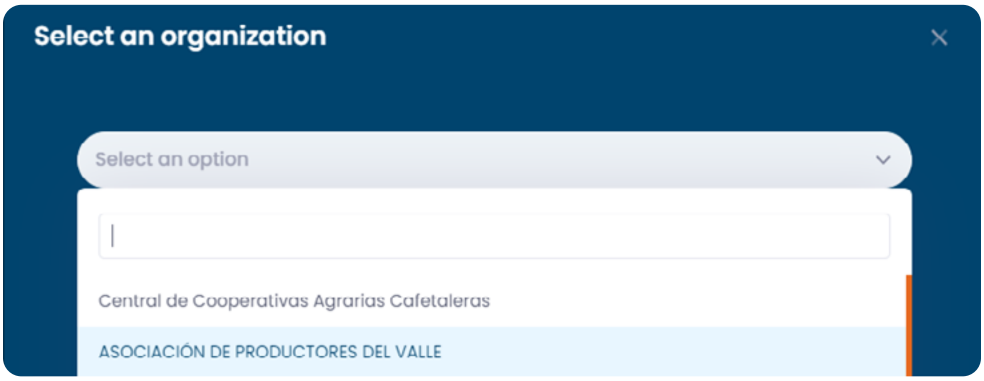
You have two options to choose from, in case you have previously created an organization or have been assigned one, press the green button:



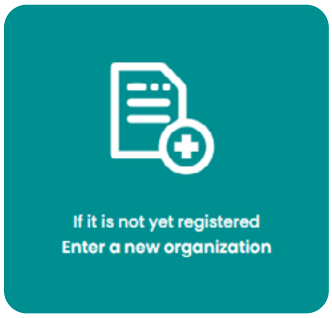
This option will provide a form to choose the organization that you want to evaluate.



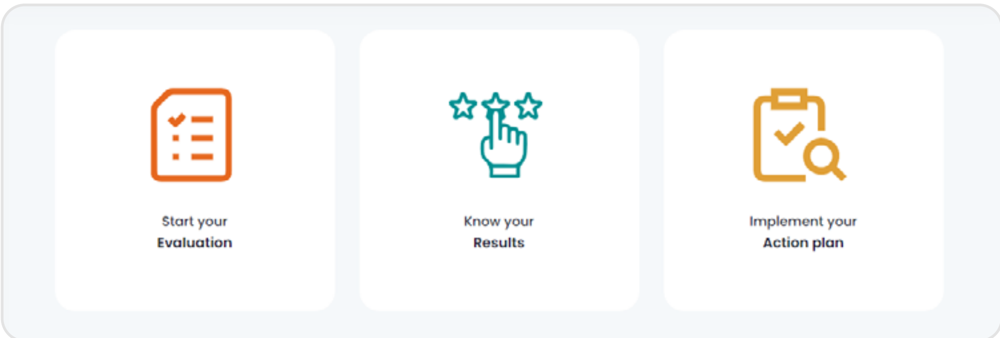
6 Assessment management



In the event that you do not find the organization you need to assess, you can create a new organization by pressing the blue button:

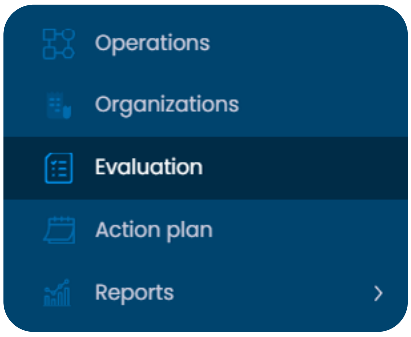


Next, you will be presented with a form for the creation of a new organization, fill out the form and when you are finished after pressing “accept” you will be redirected to the next screen where three buttons will appear:



6.3. List of assessments

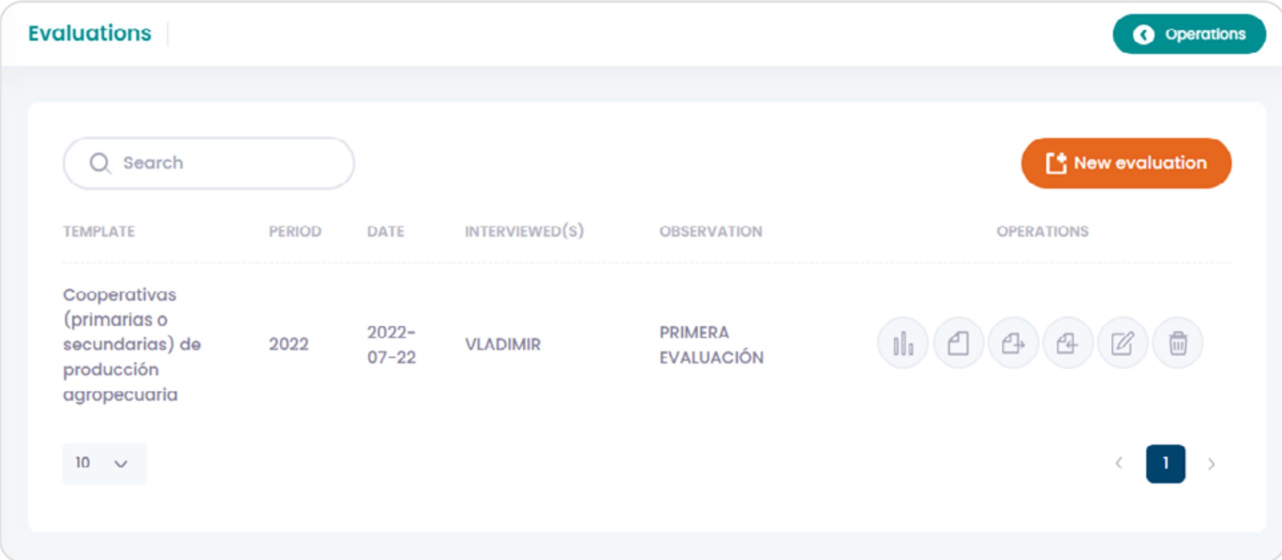
Before creating an assessment, please make sure that the assessment does not already exist. To access all the assessments of an organization it is first necessary to select an organization and then select “Assessment” on the left side menu of the application:



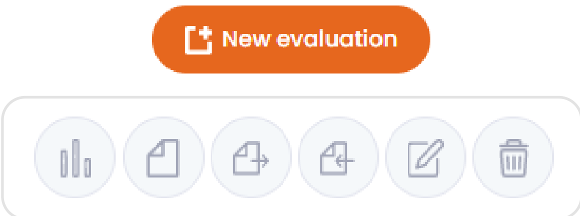
6 Assessment management

This menu, in addition to having direct access to the assessment, also contains access to the start of the application, general operations, action plan, reports and configuration.

After clicking on the main menu the link “Assessment” will take you to the assessment management and you will access the following screen:



Here it is possible to create a new assessment, access the assessment by dimensions, the action plan, download the files to do an offline assessment, upload the offline content to synchronize, edit general data on the assessment or delete it using the buttons.

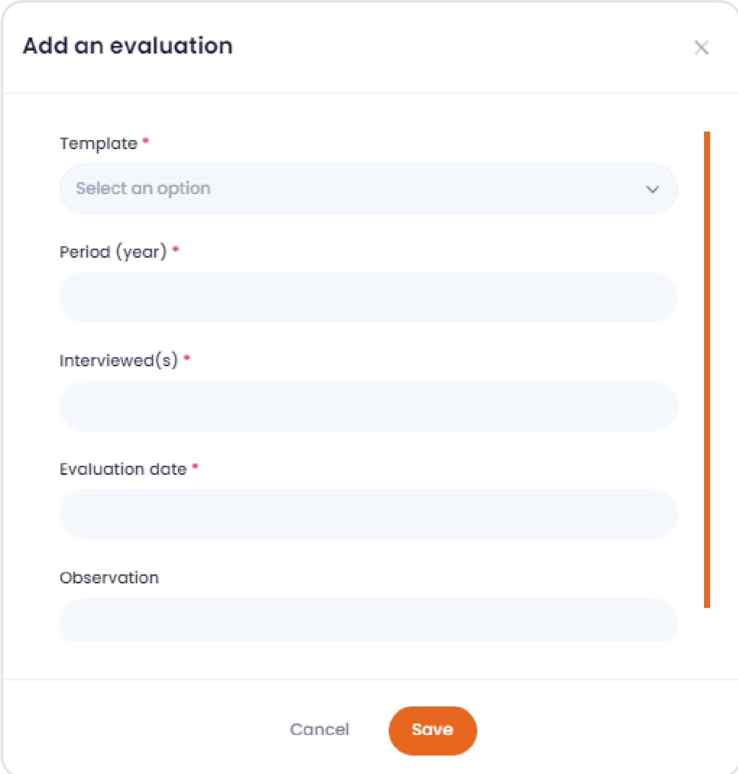


6.4. Do an assessment

To start the assessment process press the blue button “Start your assessment”:

6 Assessment management

A form to add a new assessment to the organization will be submitted immediately afterwards. It is possible to assess one or more organization.



The following describes all the fields that are required:

Template

The chosen template is the name of a questionnaire containing qualitative questions (including their answers and actions), quantitative questions and services offered to its members according to the type of organization. This is the questionnaire that will be answered or filled out later when the evaluation is carried out.

If you have concerns about which template to use, please check with your administrator.

Period (year)

It is the period or year that you want to assess.

Interviewee(s)

It is the name or names of the people who will be interviewed to fill out the assessment questionnaire.

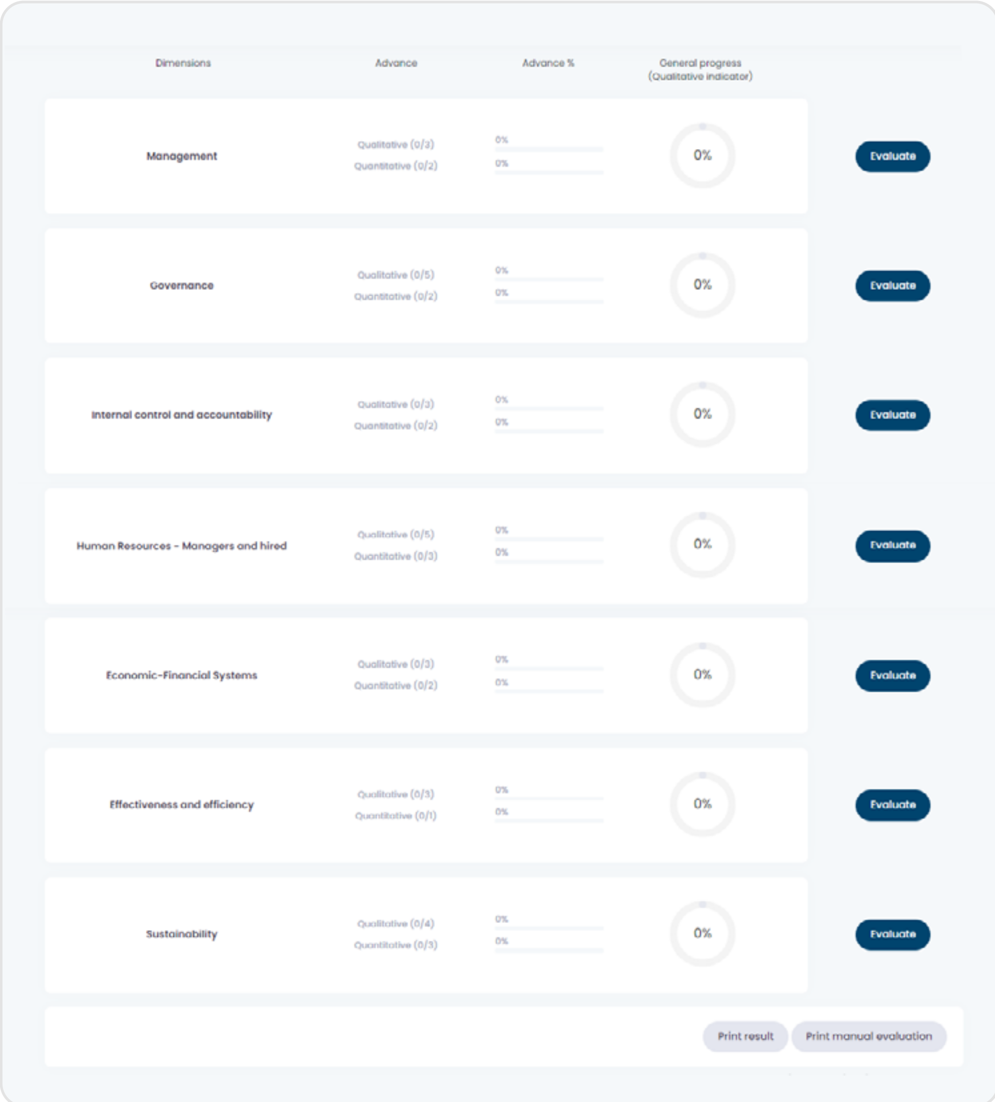
Evaluation Date

Represents the date on which the assessment is made.

Observation

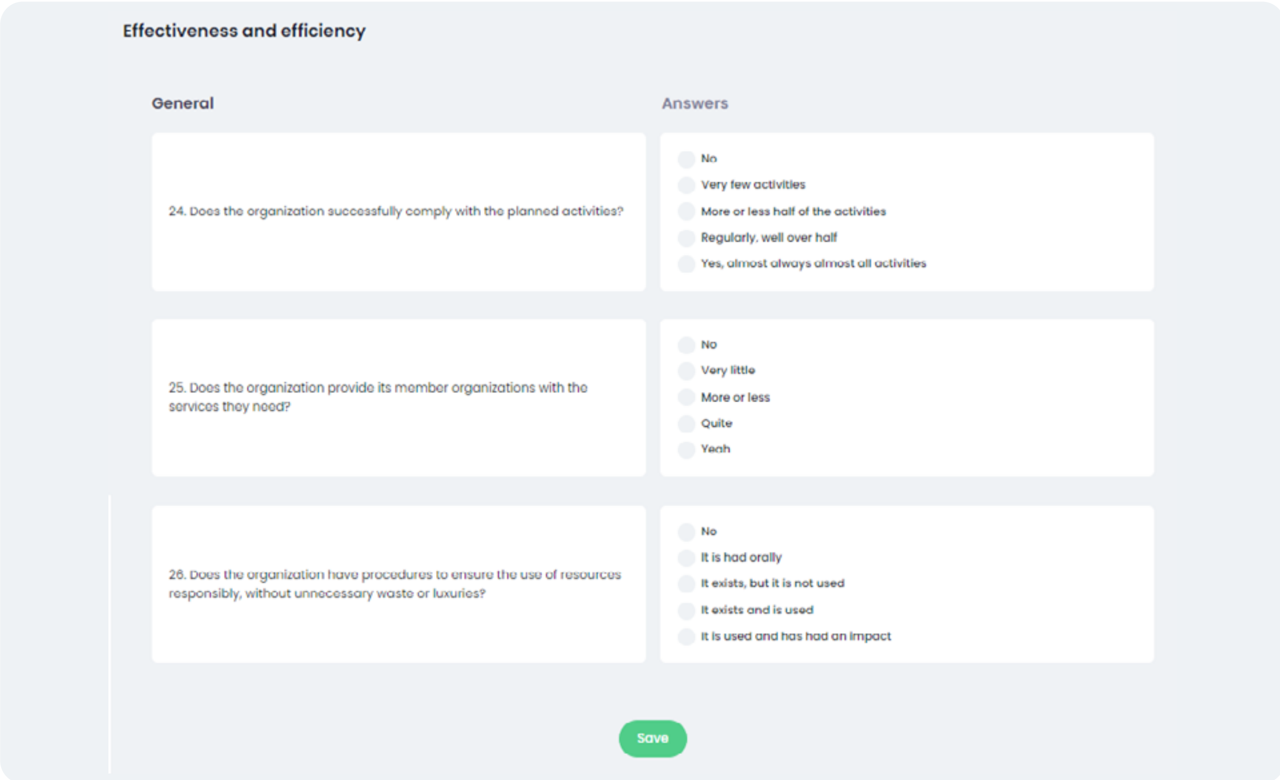
In this field you can add any comments you see fit.

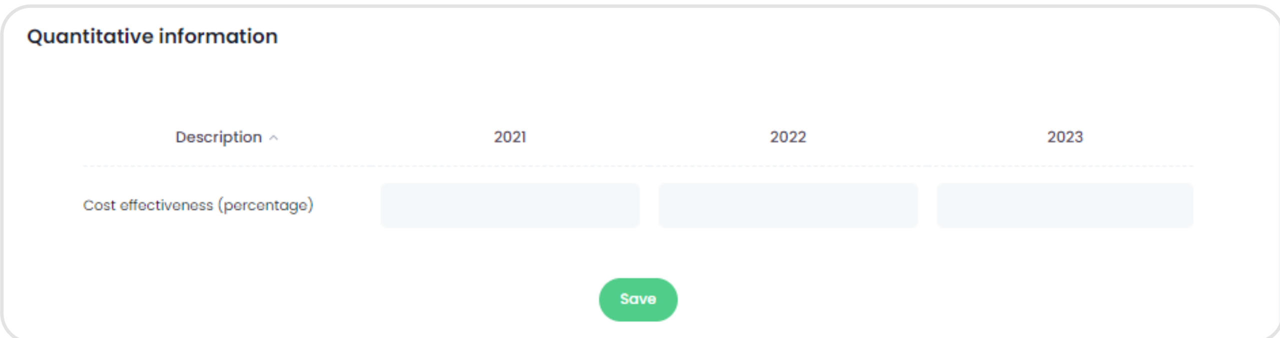
When you save the form, you will be redirected to a new screen where the list of dimensions to be assessed is displayed. This list of dimensions, and your questions, will depend on the template that was selected when creating or adding the assessment. The dimensions of an assessnebt template for first or second grade/level cooperatives that carry out productive activities are shown in the case below. There are other templates for other types of organizations such as higher-level cooperatives that mainly have representative purposes.



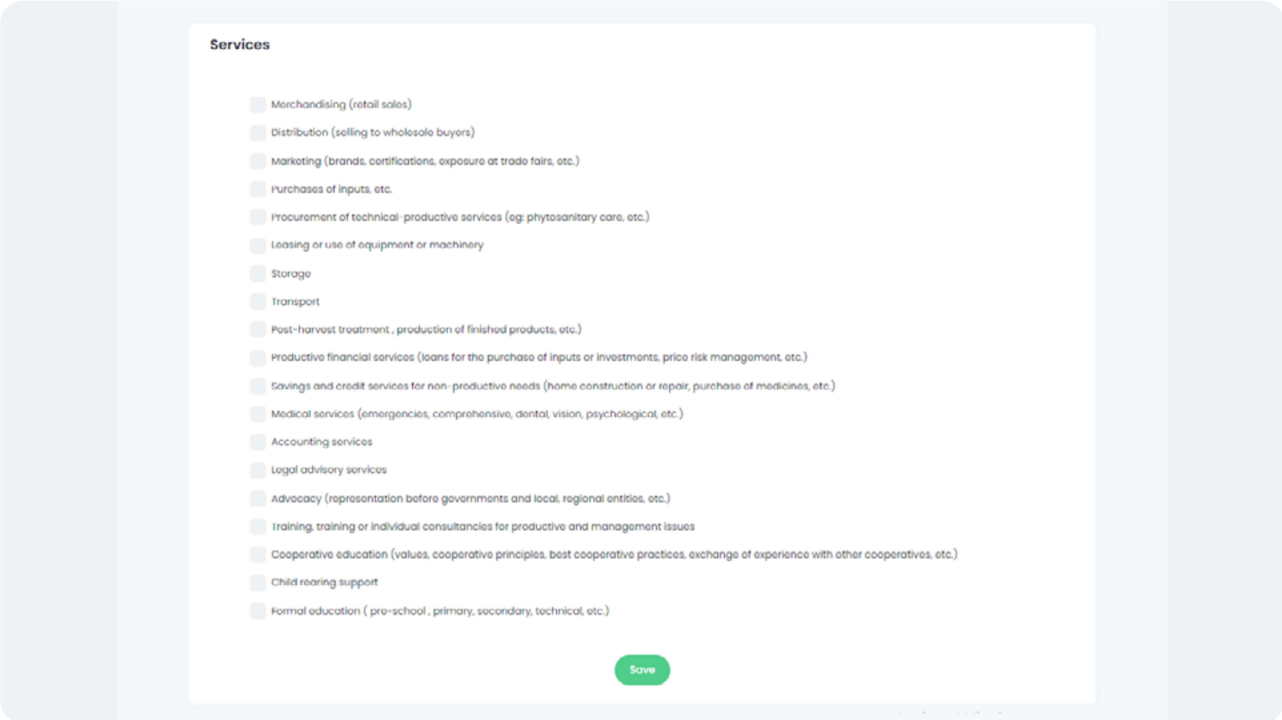
6 Assessment management

By pressing "Assess" for each dimension, you will be able to access the questionnaire related to this dimension, the following screen will be presented:

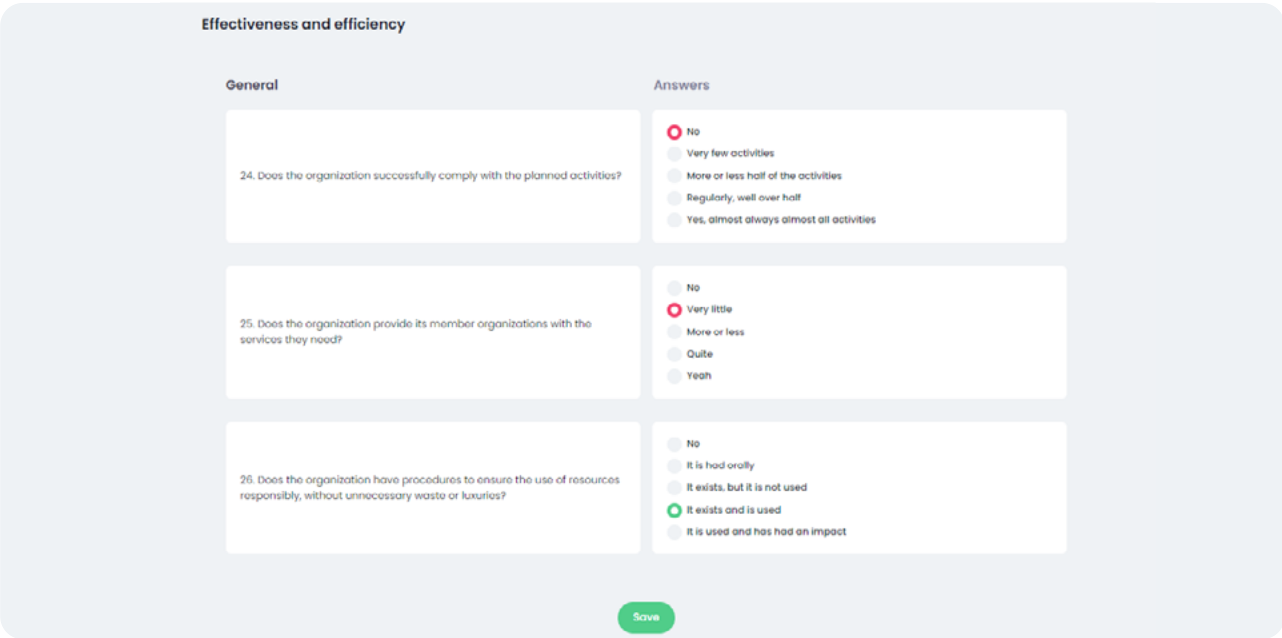


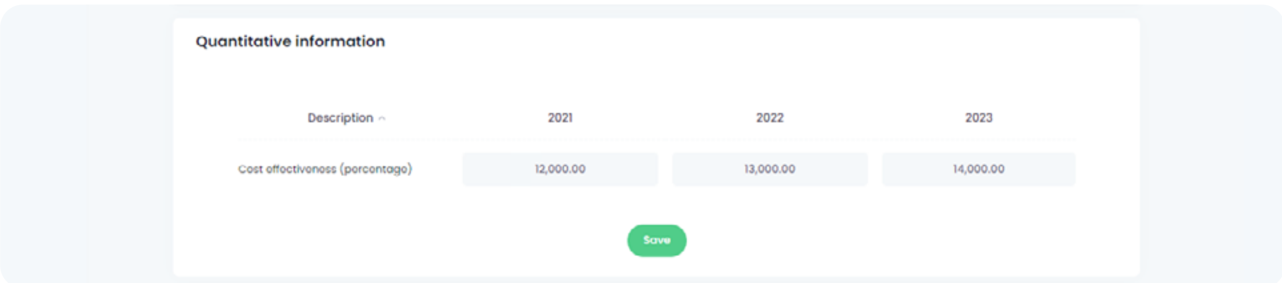


6 Assessment management

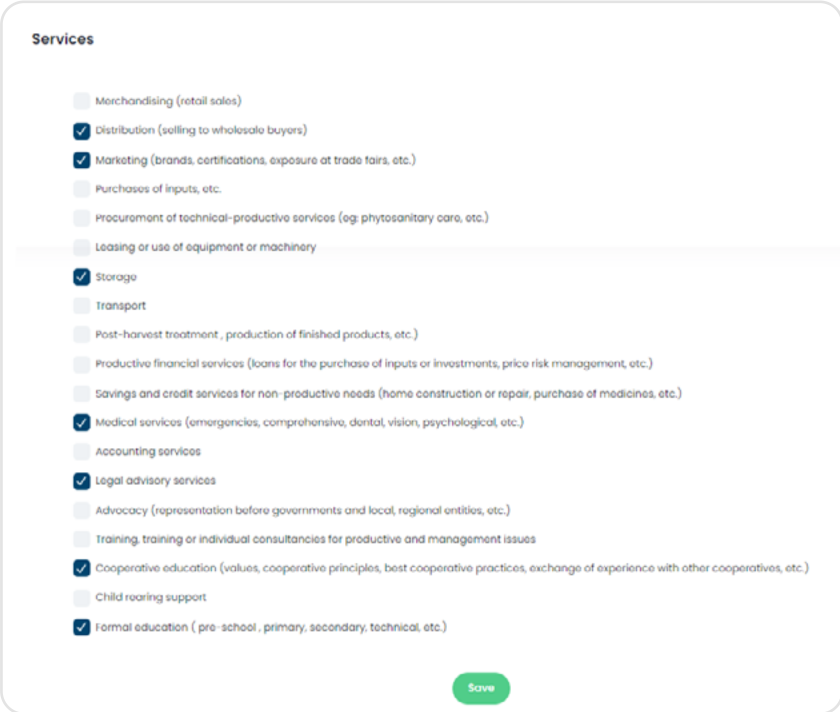


As the questions of one dimension are answered, the green “Save” must be pressed in each section of the form.

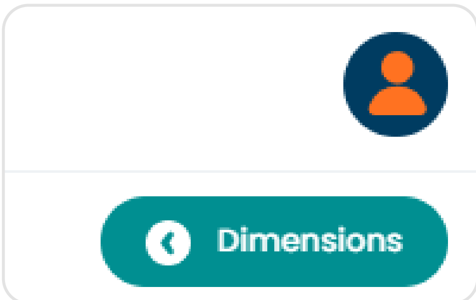




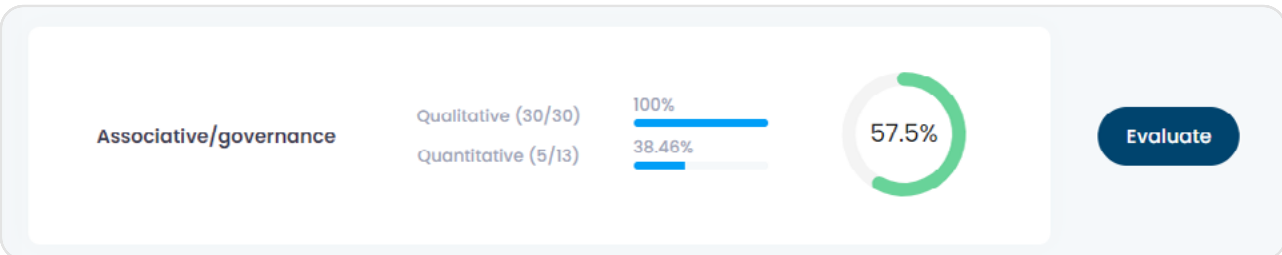
6 Assessment management



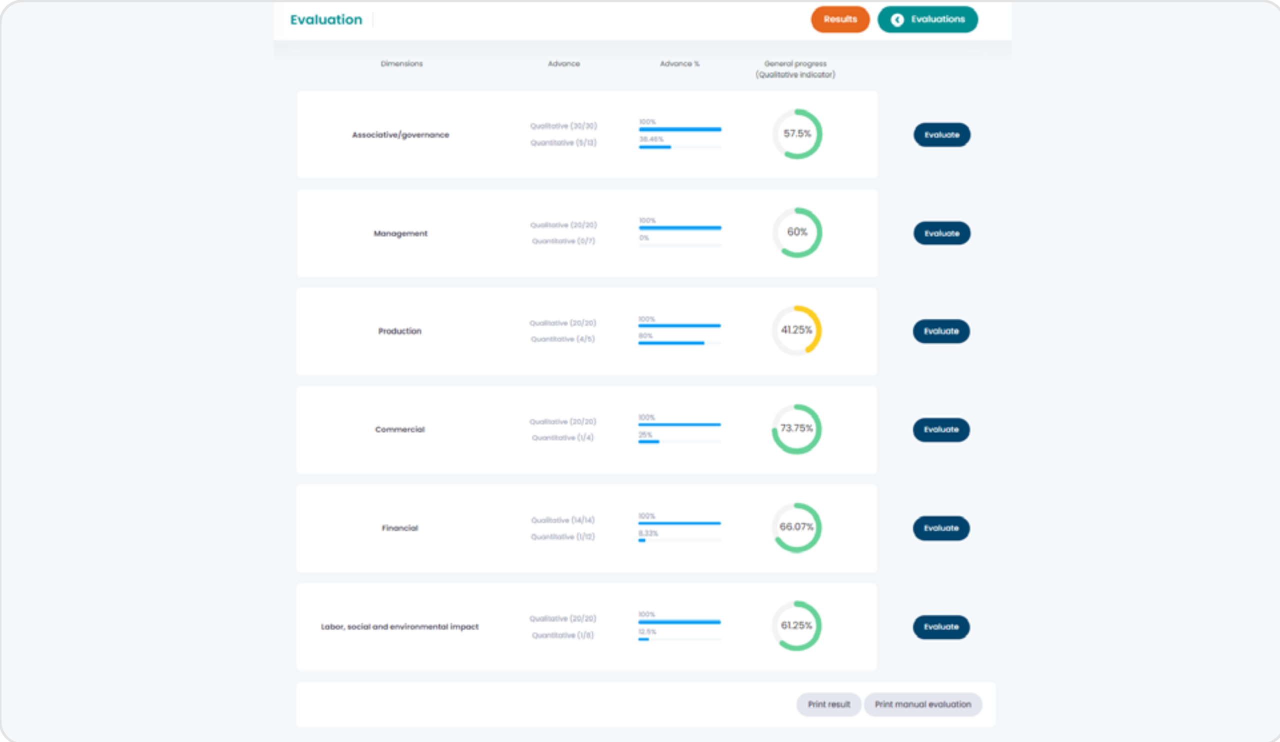
To re-assess the other dimensions, press “Dimensions” located at the top right of the application.



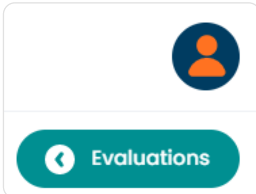
When you return, you will be able to visualize the progress of filling out the questionnaire for each dimension, as well as the result in percentage derived from the assessment according to the scores that were assigned to the answers of the qualitative questions.

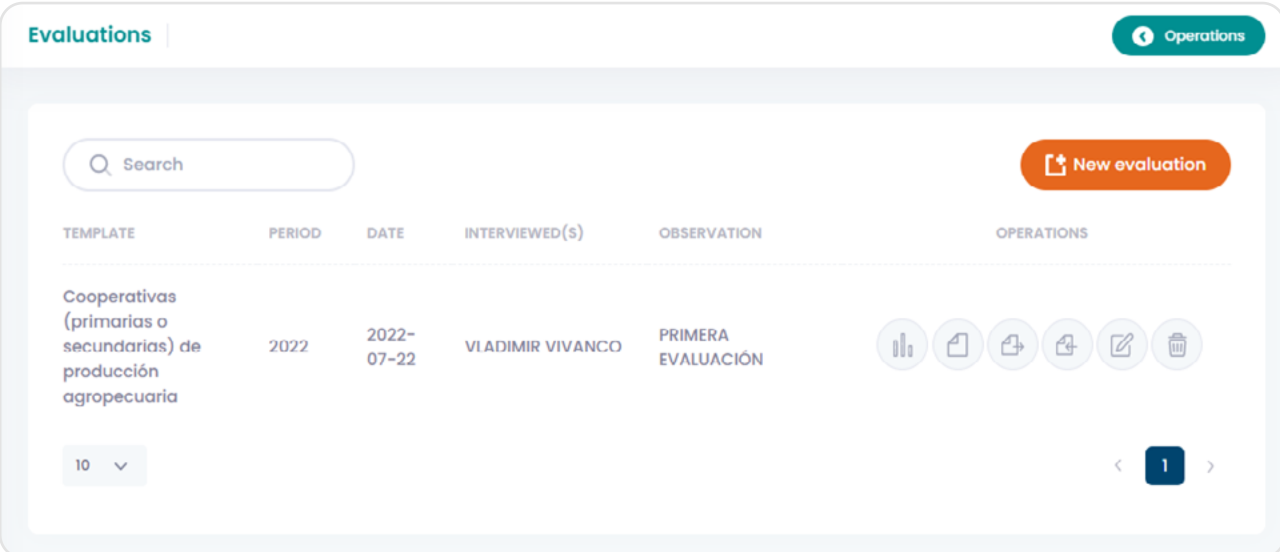


6 Assessment management

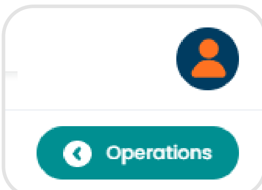


Once the assessment is completed, you must return using "Assessments" located at the top right of the application to return to the assessments section:





Optionally, you can return once more to the assessment operations by pressing the "Operations" button also located at the top right of the application:



6.5. Print the answers to the assessment questions

Access the assessment where the dimensions to be assessed are shown using the button

Then press “print result” Print result

The information that appears can be printed to share with the assessed organization.

Central de Cooperativas Agrarias Cafetaleras Cocla

Evaluation - Date: 2022-07-22 - type: Cooperativas (primarias o secundarias) de producción agropecuaria - Period: 2022 - Interviewed(s): VLADIMIR VIVANCO - Observation: PRIMERA EVALUACIÓN

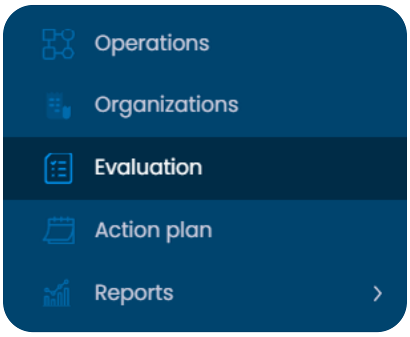
Associative/governance

Qualitative evaluation

Question	Answer
Internal norms and associate rights	
1. Does the organization deliver or make accessible (published on a wall and/or web page) an annual copy of the cooperative's bylaws to members, and does it provide training on these and other internal regulations so that all members know their rights and duties?	No (0 pts.)
2. Does the organization hold, at least once a year, a general assembly where the financial results of the previous year are analyzed in detail (results of production, collection, sales and, above all, comparative evolution of the costs of the last 3 years and the projection for beginning year)?	Yes, and partners understand and ask (3 pts.)
3. Do all associates have the same right to participate and vote in the General Assembly ("one person, one vote"), regardless of position or responsibility, contributed capital, seniority or other criteria?	Yes, totally (4 pts.)

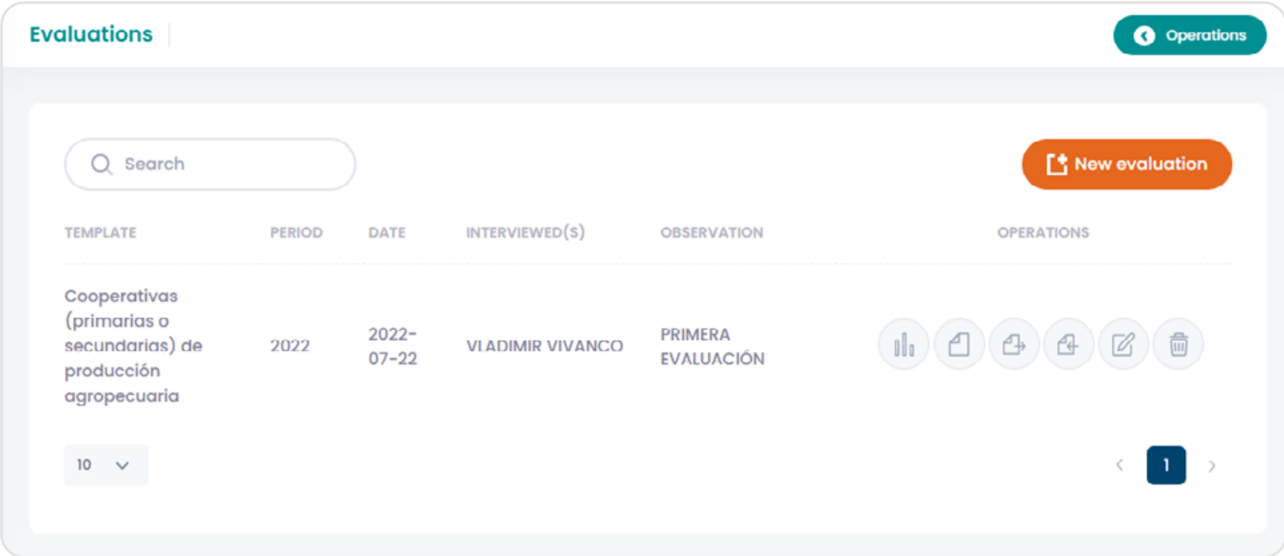
6.6. Conducting an offline assessment

To develop an offline assessment, it is necessary to previously create an online assessment following the instructions previously exposed in the “Assess someone” section or you can access it on the left menu as shown in the image.

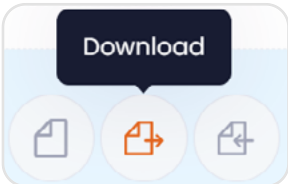


6 Assessment management

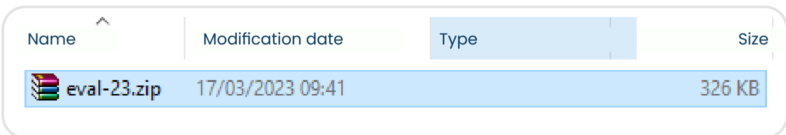
Then you will need to create or choose an assessment from the list of assessments available in this section:



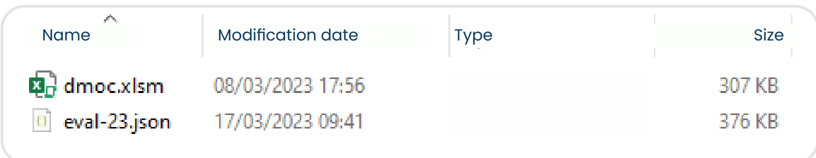
Then press the download button to get a package with the necessary information for offline work:



You will get a single compressed file:

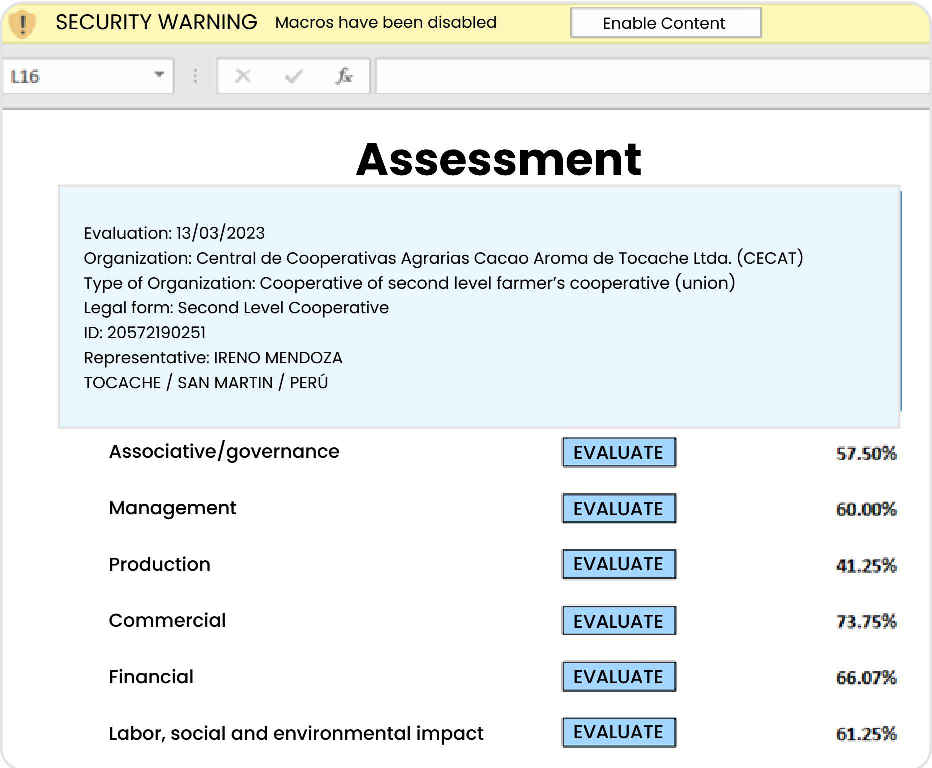


Unzip the downloaded (zip) file to get two separate files:

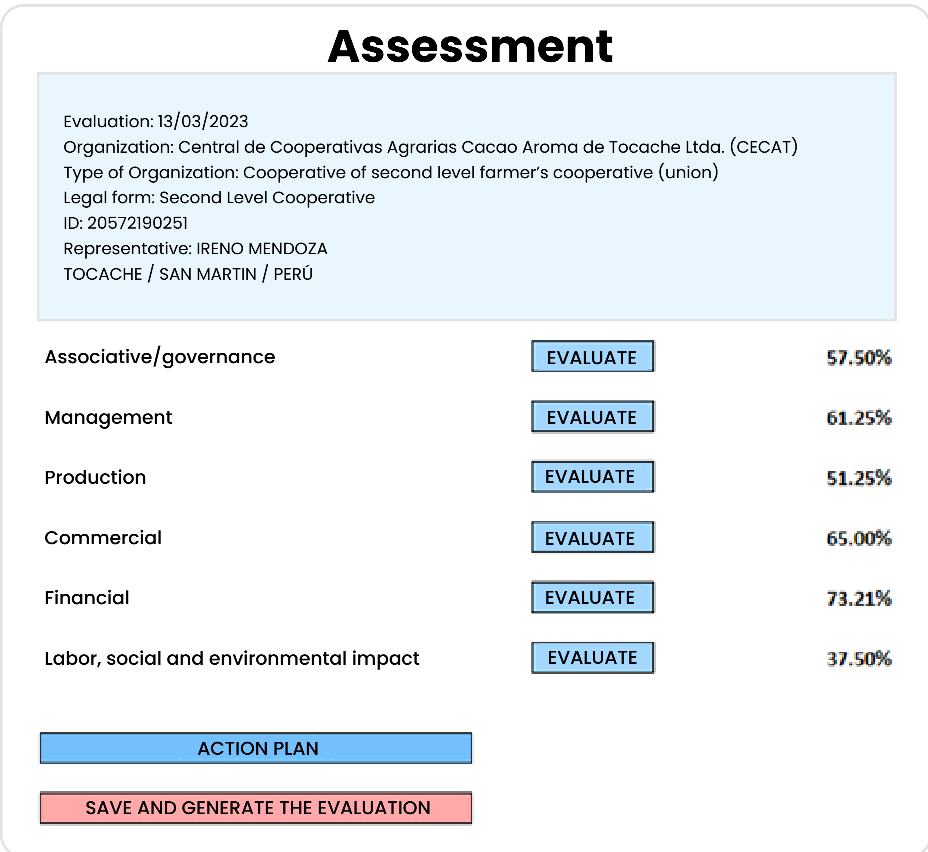


Open only the “dmoc.xlsm” file, this file works with Microsoft Excel 2010 software or higher with macros enabled. It is also necessary that the files “dmoc-xlsm” and “eval-xx.json” are located in the same folder without any additional files.

6 Assessment management



In the event that a message is displayed at the top of the Excel macro in yellow, accept it, close the file and reopen it.

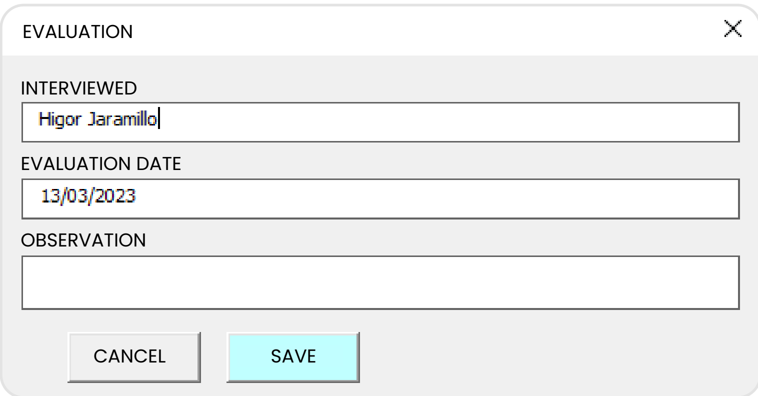


6 Assessment management

The operation of the macro is similar to the online operations to develop an assessment and develop the action plan.

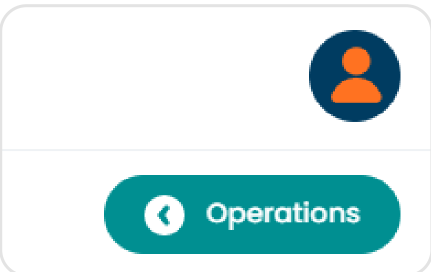
If you want to update the general information of the assessment such as the date, the person responsible or add some information, you must double-click on the section where this information is presented.

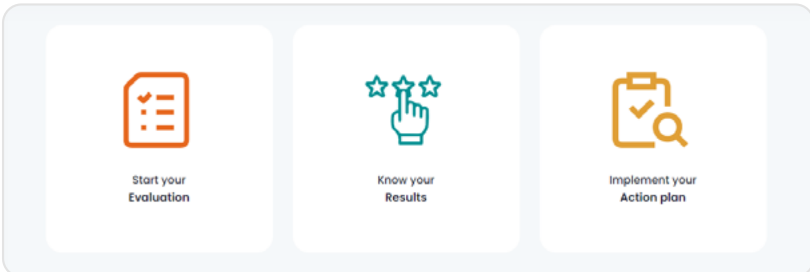
Evaluation: 13/03/2023
Organization: Central de Cooperativas Agrarias Cacao Aroma de Tocache Ltda. (CECAT)
Type of Organization: Cooperative of second level farmer's cooperative (union)
Legal form: Second Level Cooperative
ID: 20572190251
Representative: IRENO MENDOZA
TOCACHE / SAN MARTIN / PERÚ



6.7. Results of an assessment

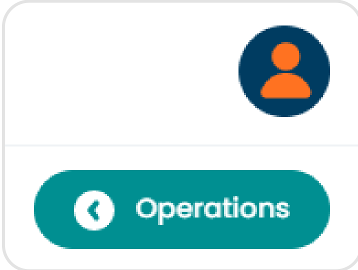
To see the Results of the assessment, you must press "Operations" also located at the top right of the application, obtaining the following screen with "Know your Results":



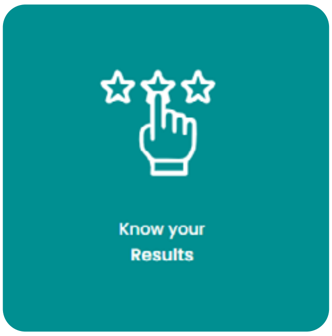


Assessment management

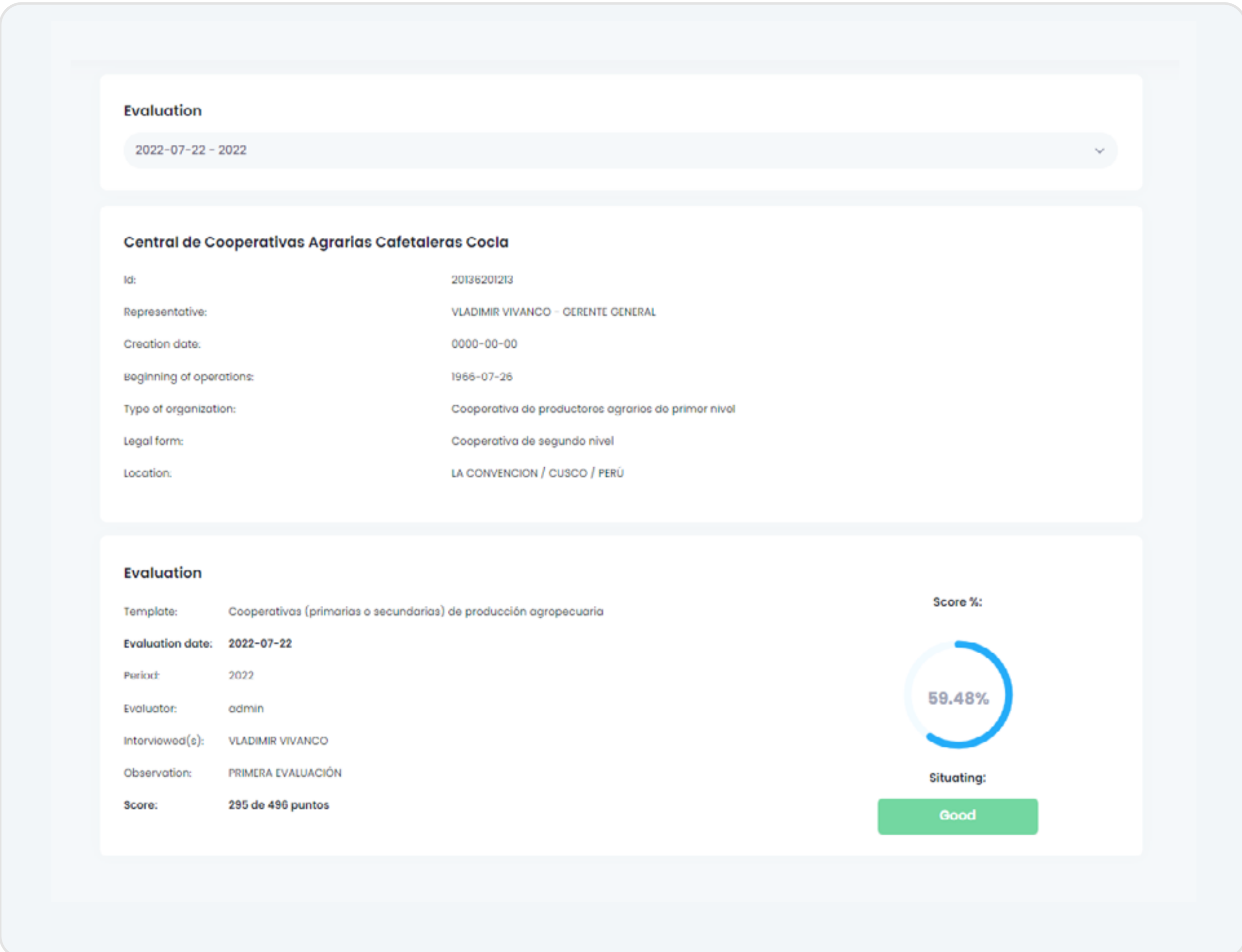
To find out the results of the assessment, return to the main operations by pressing "Operations" located at the top right of the application.



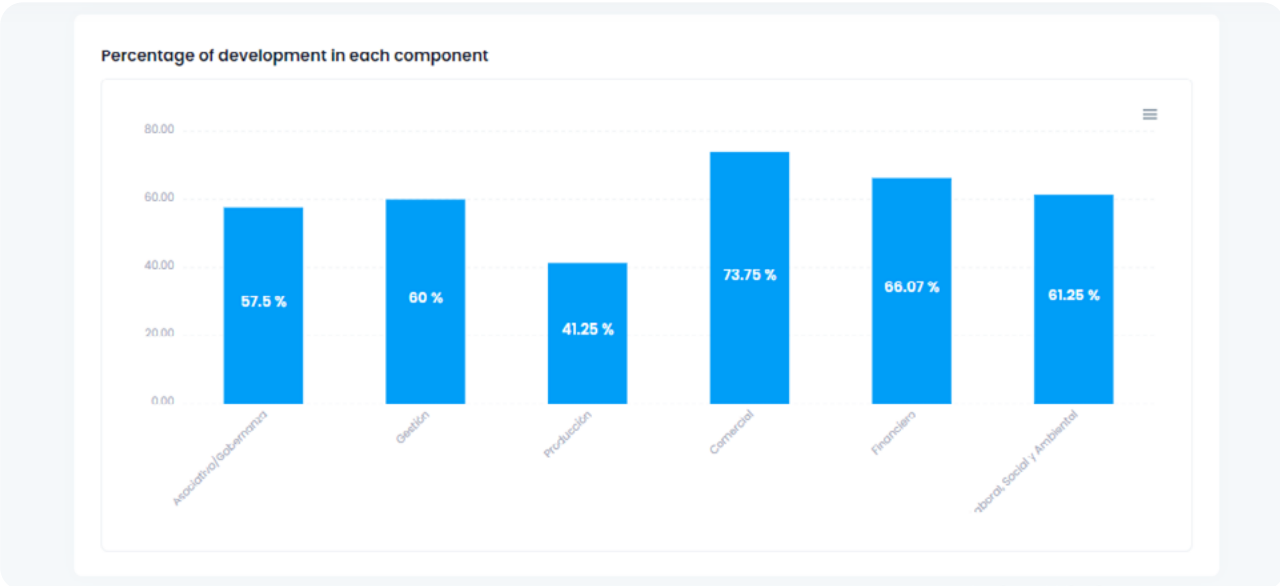
Then press the green "Results".



The results of the assessment and the action plan are summarized in this section:



6 Assessment management



Advance : 0.00 %

7 Management of action plans

7.1. What you need to know before developing an action plan

An action plan is a list of actions derived from the answers given to the qualitative questions, each with a responsible party and milestones that must be completed by responsible parties.

A single action plan is generated from an assessment, consequently, there is only one action plan for each assessment.

Action plans should be co-developed with the people who participated in the assessment, ideally on the same day or the day after the assessment.

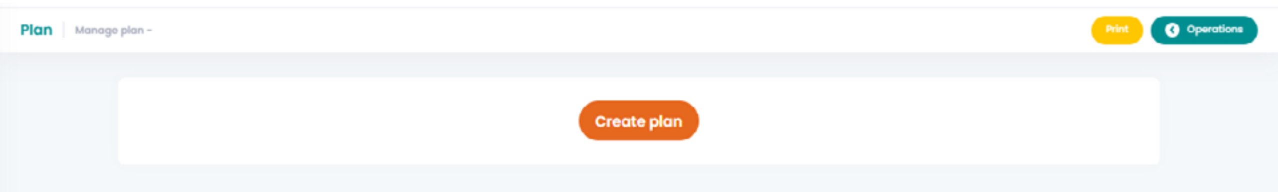
When generating or creating an action plan, general actions will appear that are automatically generated from the answers of the qualitative questions, according to the assessment template. As we will see, you can disable these actions, and also add additional or non-automatically generated actions.

If the assessment has been carried out offline, the corresponding work plan can also be carried out offline, as explained above.

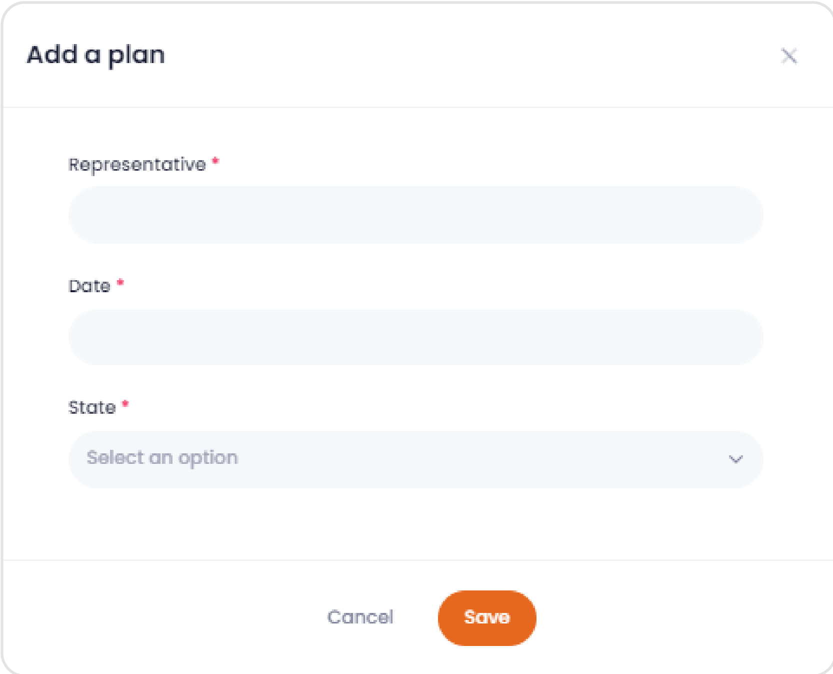
7.2. Creating a new plan

To start the co-drafting of the action plan or work, press “Action Plan”:

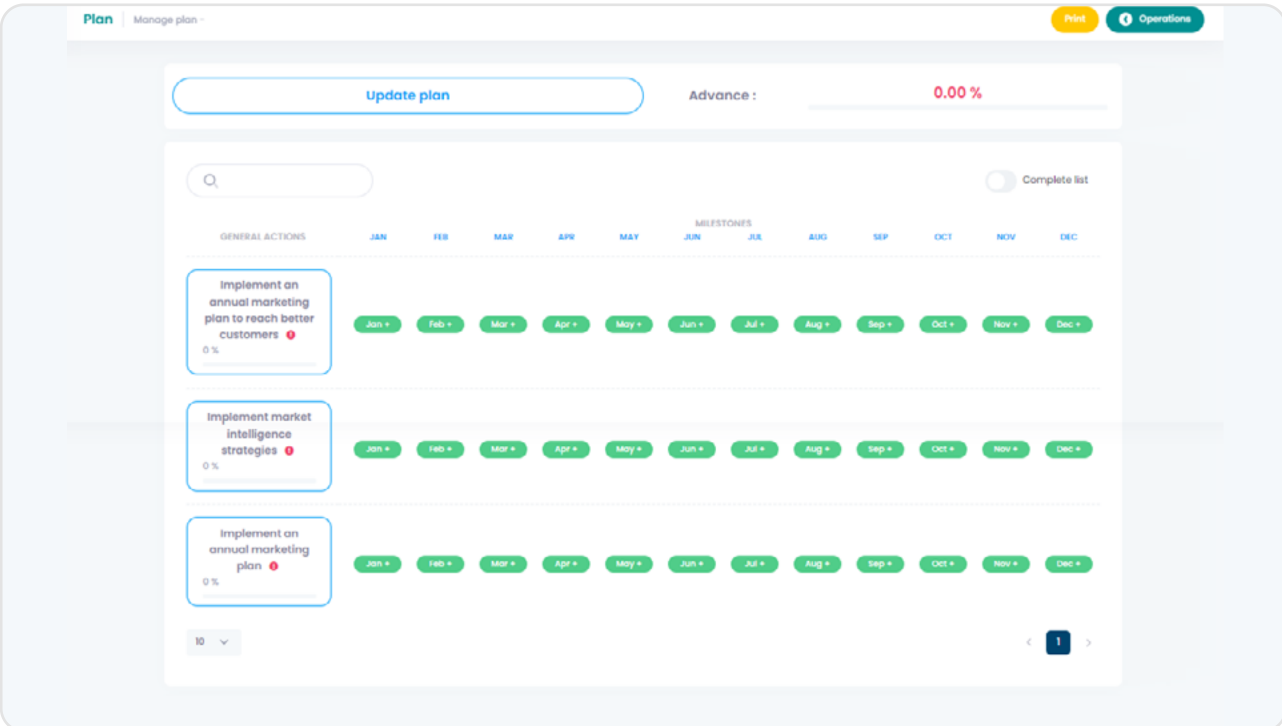
Then, you will be redirected to a new view where you can create a plan by pressing “Create Plan”. The creation of a plan requires the completion of the assessment development. If the assessment has been partially carried out, you can update the plan again to reorganize the resulting actions.



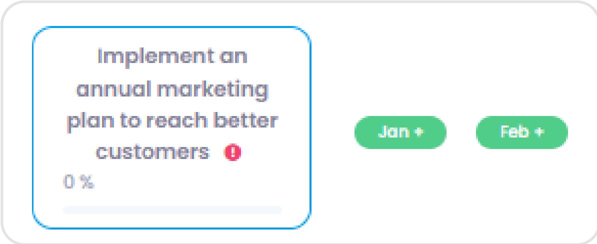
7 Management of action plans



After the creation of the plan you will be redirected to the following view:



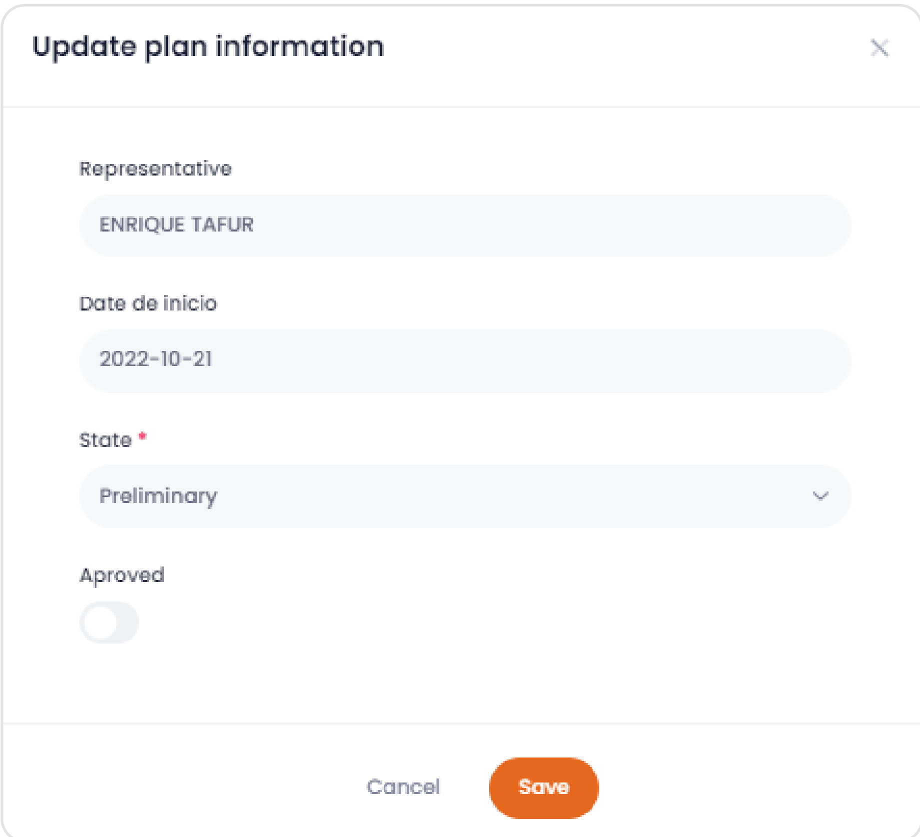
General actions will be shown in this view. A general action is visible because of the answer given to a qualitative question. The tool will show the most relevant actions for implementation purposes.



7.3. Updating information on an existing plan

It is possible to update the general information of the plan by pressing "Update Plan"

Then the following form will be submitted:



By updating the general information of the plan, it is possible to modify the information entered through the form and also update the general actions in the event that the assessment has been modified and the answers to the qualitative questions changed.

7.4. Indicate the status of an action plan

To indicate that the action plan has already been finalized by the organization, you must select the options of the state, "preliminary" or "final". The "preliminary" status means that changes may be made to the general information, actions, milestones or assessment that will cause an update of the general actions. The "final" status means that it has already been finalized and approved by the organization, so no further changes will be made, except for the modification of the actions progress percentage or the status of the milestones. This information will be used as an indicator to determine the number of plans in "preliminary" or "final" status.

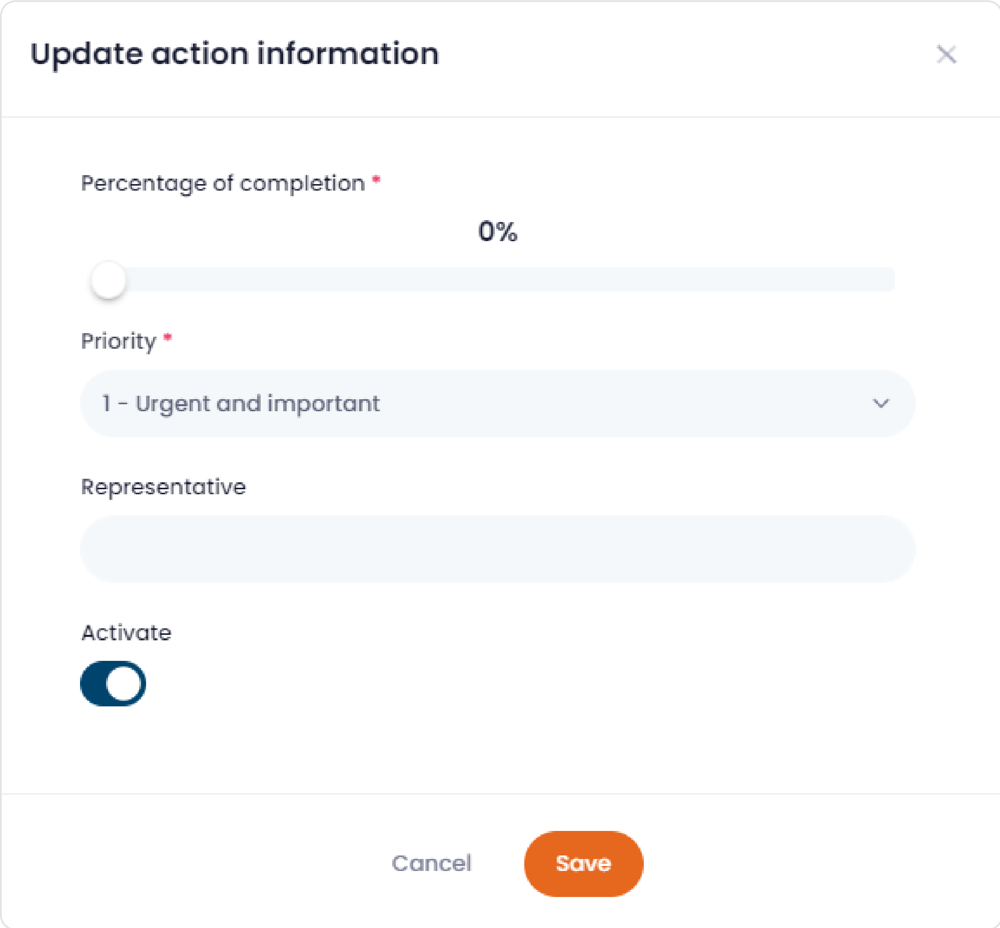
7.5. Information update of the general actions of the plan

By updating the general information of the plan as explained above, the general actions are also updated, in case the assessment has been modified and the answers to the qualitative questions changed. This behavior is useful when it has not been possible to complete the assessment completely and the plan needs to be developed in parallel.

7.6. Edit a general action

By pressing the box containing the general action you can update the main data:

7 Management of action plans



The following describes all the fields that are required:

Progress percentage

Refers to the implementation percentage estimate of the general action, this estimate is proposed by the interviewee.

Priority

It is the estimation of the importance and urgency that is determined in the general action.

Responsible party

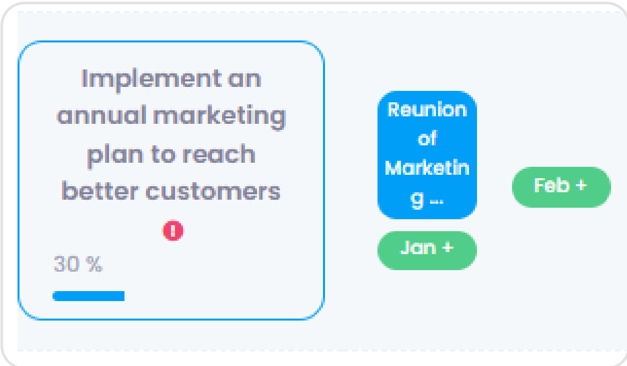
Person who will be in charge of implementing the general action.

Enable

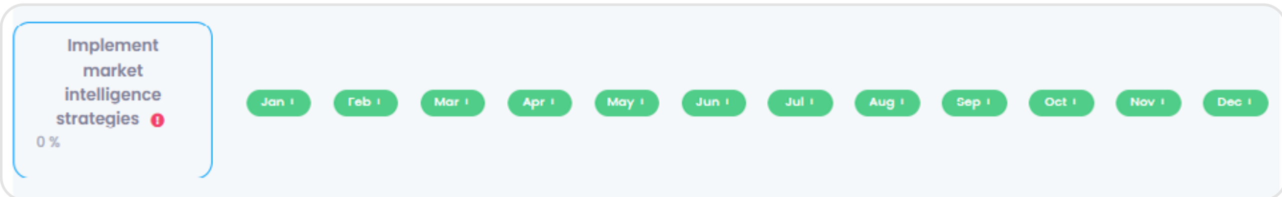
Allows the action to be visible to the assessor, when it is deactivated the general action remains hidden but not deleted, it is possible to re-activate it.

7.7. Add, update and complete a milestone

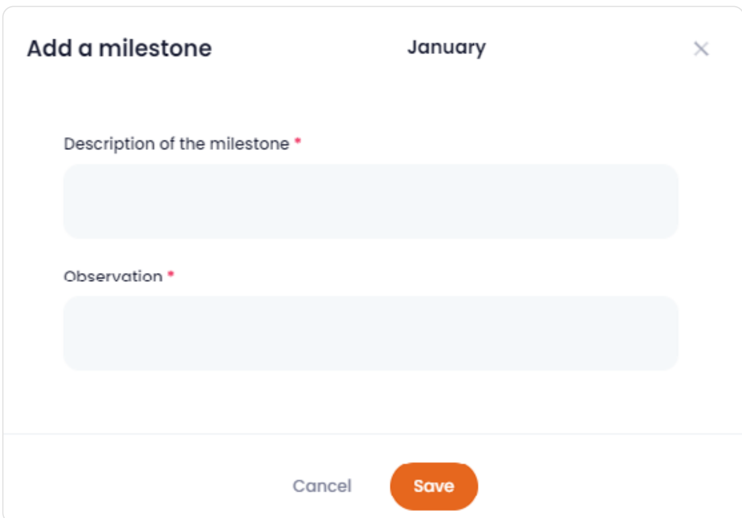
To determine deadlines for the implementation of the general actions proposed by the application, it is necessary to create milestones, these are more specific actions or concrete results that must be met in the month they are established.



To add a milestone you must press the green buttons that are located to the right of each general action, these are 12 buttons that represent one month from the creation date of the plan, considering the creation month and the following eleven months.

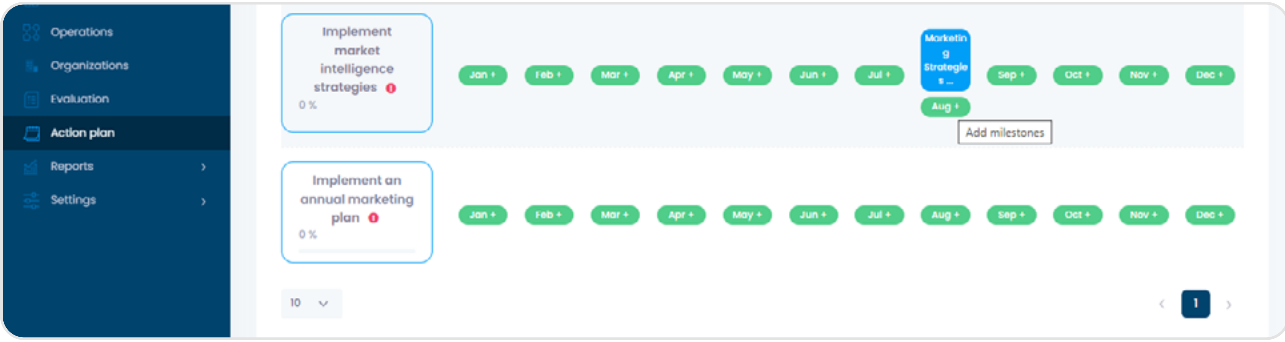


Each button displays a form that contains a field for the milestone description and another field for any observation.

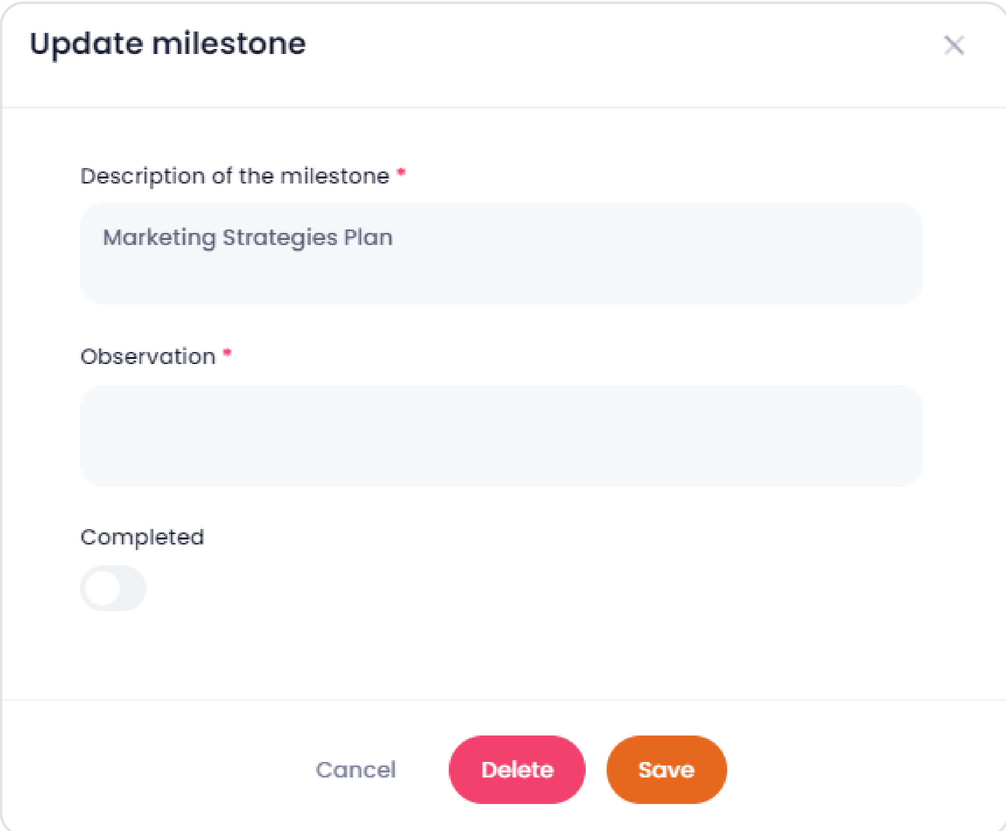


7 Management of action plans

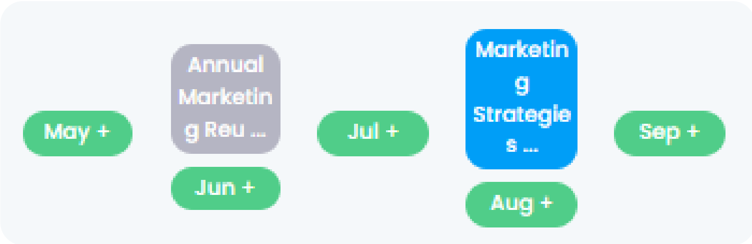
When saving the form a new milestone will be added which is represented on a button in an abbreviated form:



To edit a milestone press the blue button representing the milestone, then a form will be displayed as shown in the following image:

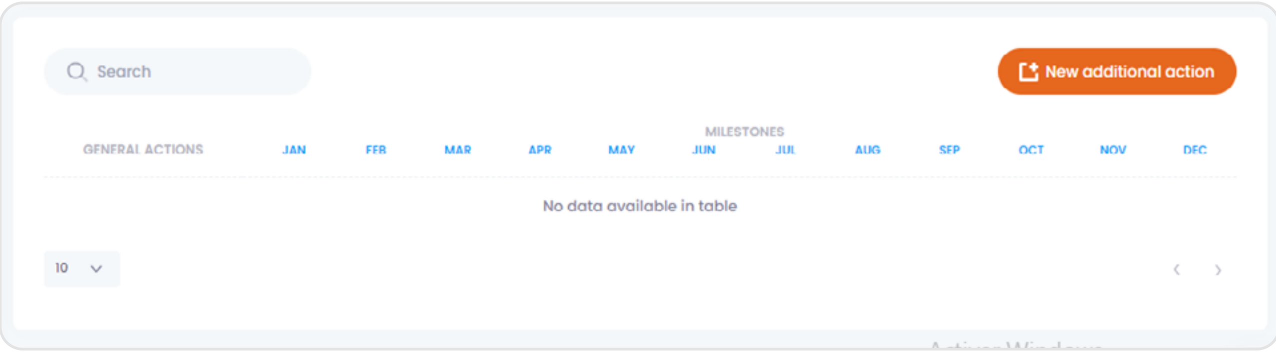


In addition to editing the description and the observation of the milestone you can also mark it as completed, this will cause the milestone to change color which will indicate that it has been fulfilled for implementation.

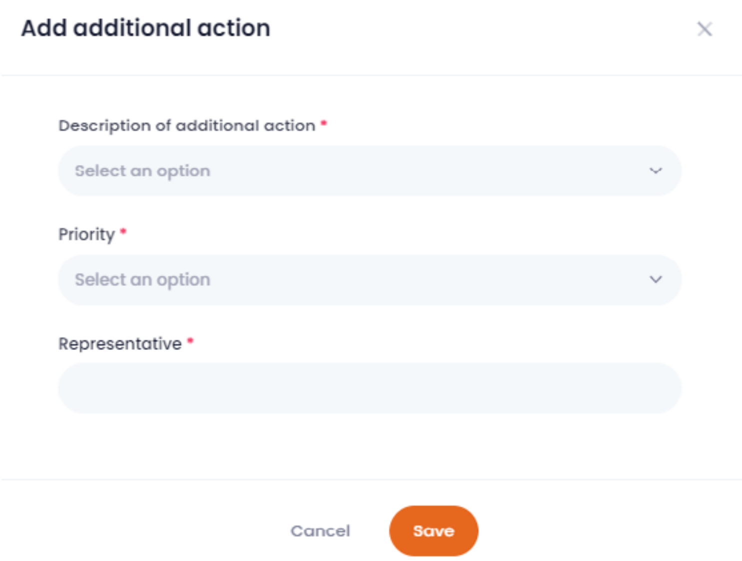


7.8. Additional actions

The additional actions are those actions that were not included in the corresponding assessment template and therefore do not automatically appear among the "general" ones. These are actions that are not shown in the general actions list. These may respond to some particularity of the organization on which it is necessary to carry out an improvement action. Thus, an additional action can be generated from a very obvious need but that is not considered in the assessment.

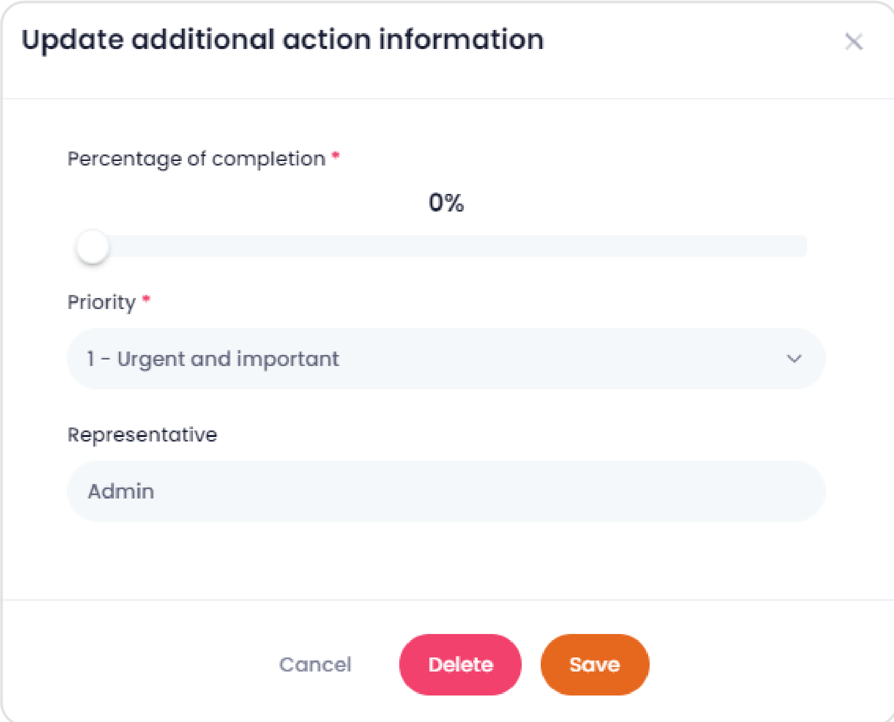


To create a new additional action press "New Additional Action", then the following form will be displayed:

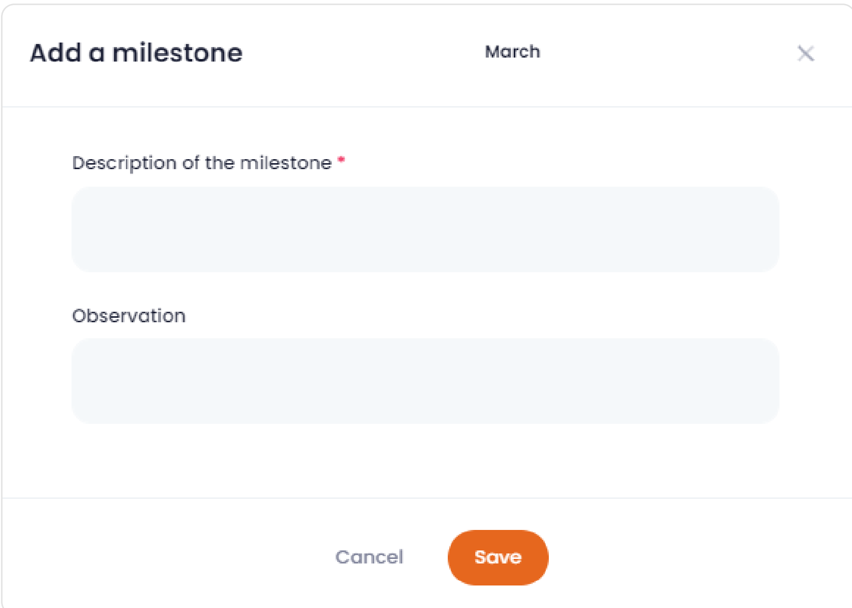


7 Management of action plans

By pressing save you will be able to create a new additional action, as in the general actions, the additional actions can be edited and even deleted, you just have to press the box containing the name of the additional action of which the following form will show.

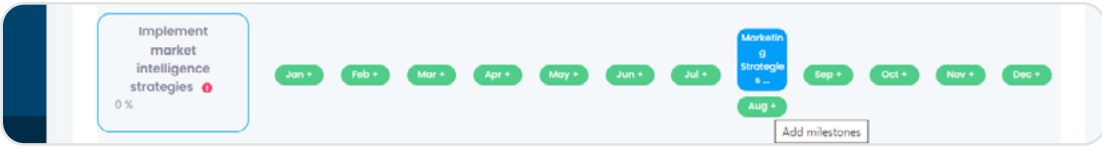


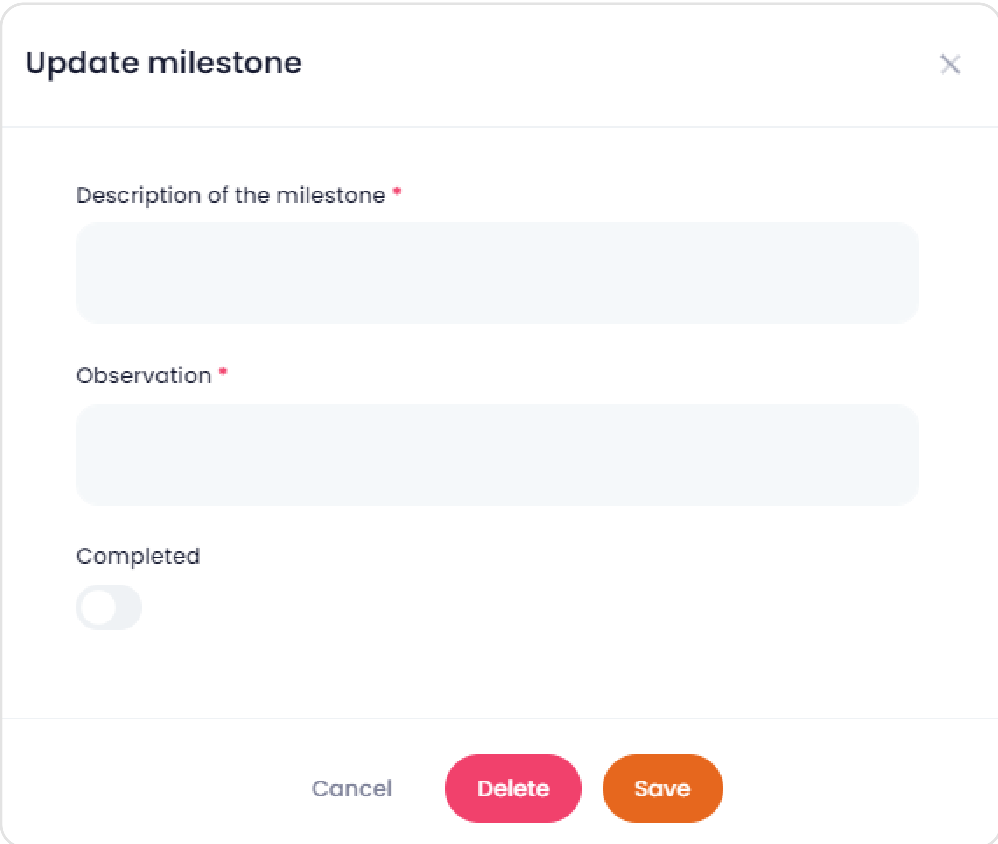
To add a new milestone to an additional action, similar steps are taken to create milestones in the general actions, just press the green buttons and complete the form that will allow adding a milestone.



7 Management of action plans

After finishing the creation of the milestones for the additional actions it is also possible to edit or delete them by just pressing the blue buttons that contain the abbreviated name of the milestone, additionally you can mark the milestone as completed.





7.9. Print an action plan

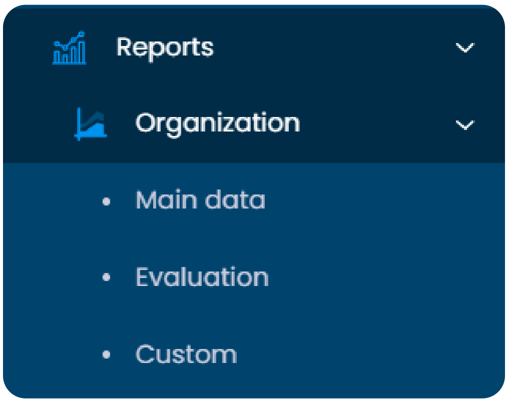
Whether or not the action plan has been finalized, you can print a report of all the general and additional actions entered using "Print" located at the top right of the application.

Print

The information that appears can be exported as a PDF to share with the assessed organization.

8 Organization Report

The main menu on the left side of the application shows the options of different reports types available:



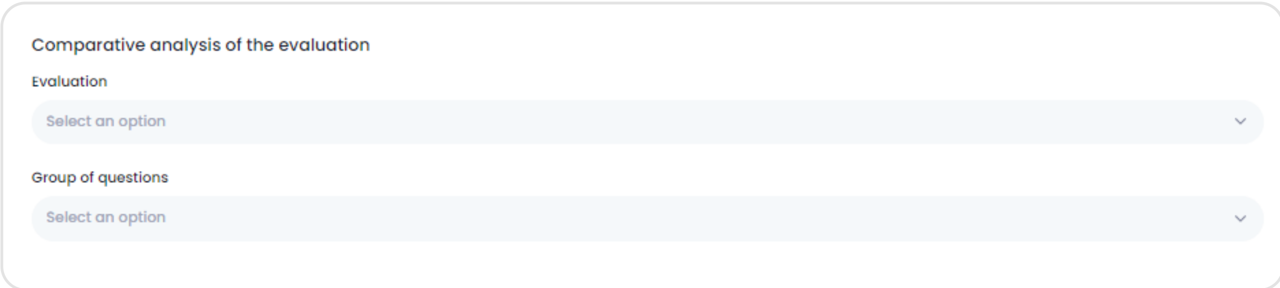
8.1. Report of the main data of the organization

8.2. Assessment report of the organization

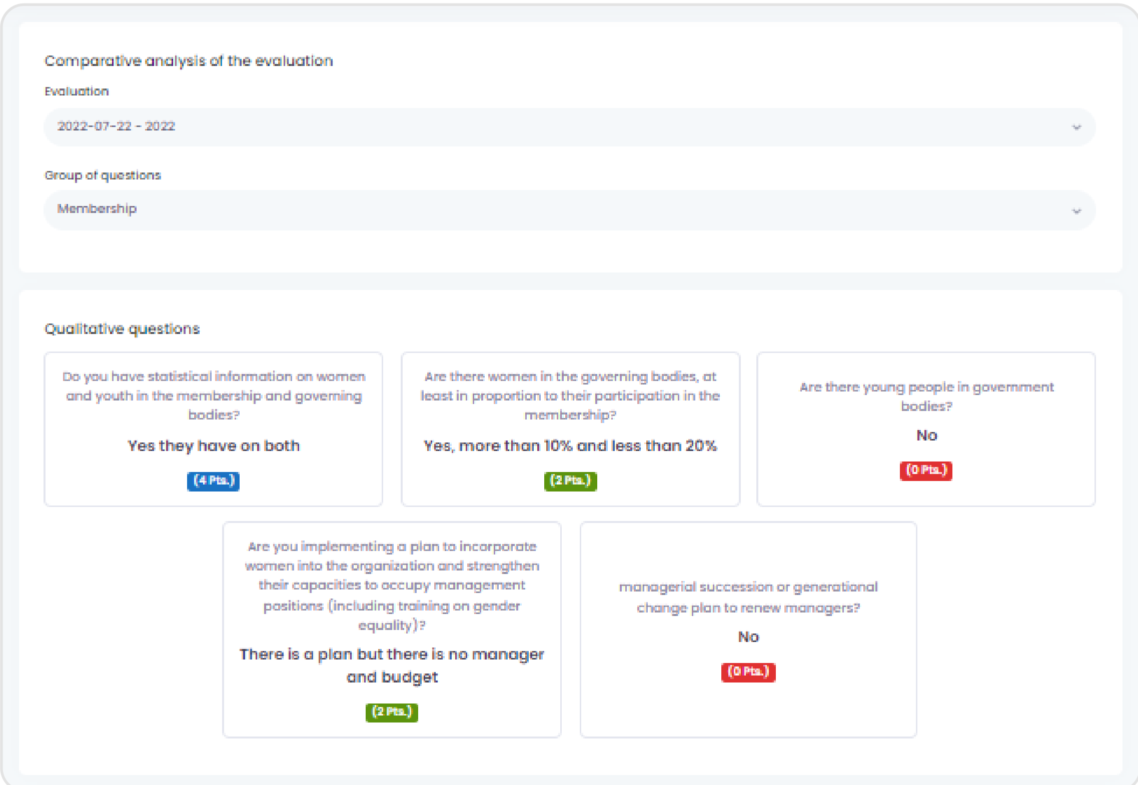
See above, which is the same as if you press "Results" of an assessment.

8.3. Personalized report of the organization

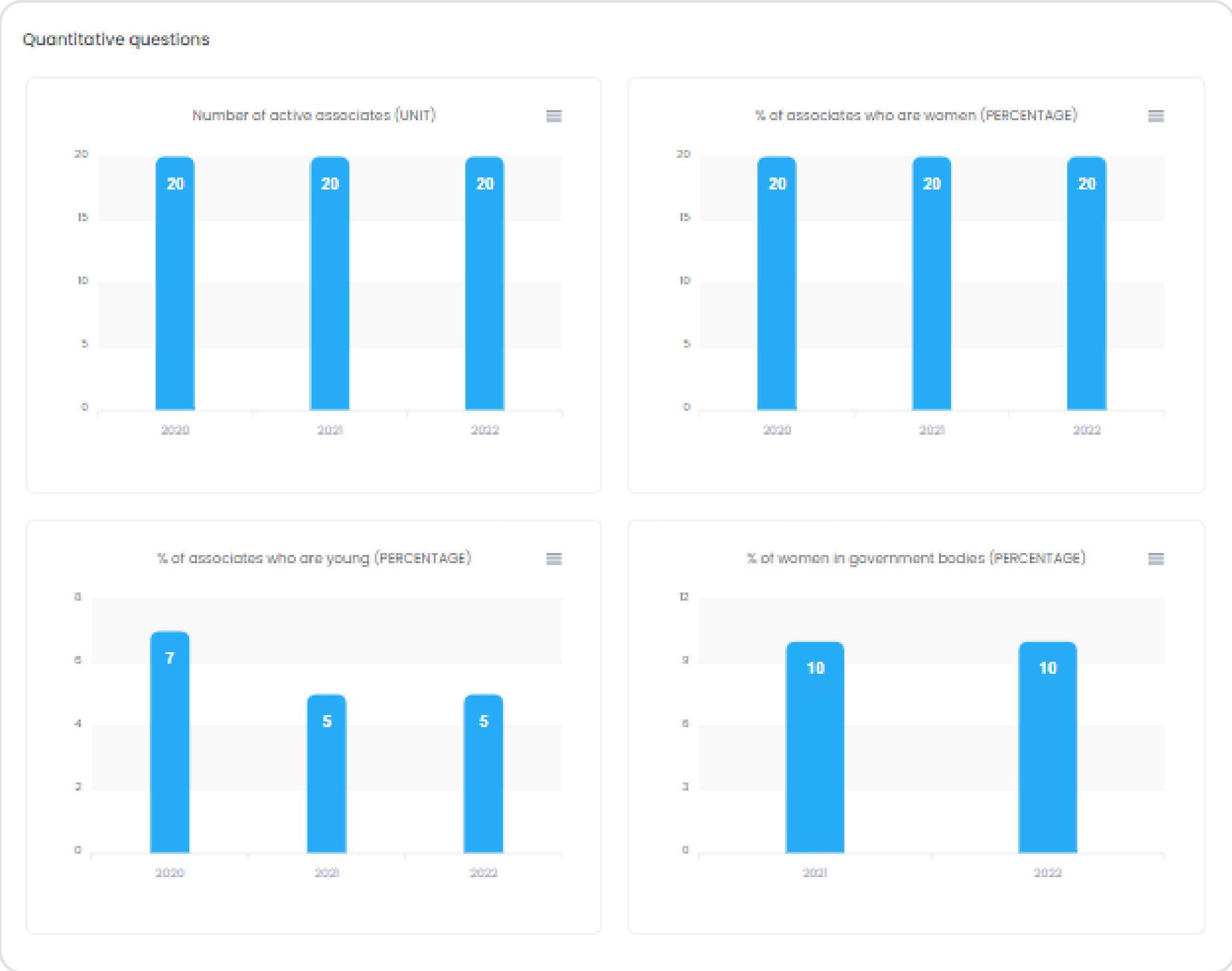
This report shows defined groups of qualitative questions related to qualitative questions that define a common theme. It is necessary to select the required assessment fields and name of the custom report group.



After selecting the data will allow to see the following screen:



8 Organization Report



10 Glossary of terms

10.1. Projects

They represent the different projects that are developed according to their characteristics, scope or field.

10.2. User

They are the people in charge of using the application according to the role they were assigned.

10.3. User management

Section where it is possible to create, modify or delete users, this section depends on the role assigned to the user it manages.

10.4. User roles

Are the set of permissions enabled or disabled for one or more users, which provides them with access to the different functions of the application. There are four types of users explained below: observer, assessor, administrator and super administrator.

10.5. Observer

User who has access only to see the organization's data to which they have been assigned, their assessments and corresponding work plans, as well as the reports corresponding to their organization.

10.6. Assessor

The User who has access to create a new organization, assess it, execute the action plan and have access to some reports corresponding to the organizations that they have created or have been assigned.

10.7. Administrator

They have access to the entire application, except for the creation of global parameters in the application (projects, location, templates, assessment measurement parameters, global parameters of the organizations), the administrator according to the project to which they belong, has control over the assessors belonging to the same project.

10.8. Super administrator

You have access to all the functions of the application without exception.

10.9. Organizations

This section shows the quantity of products according to the filters selected at the top of this section.

10.10. Dimensions

They group the levels of the qualitative and quantitative questions and services, they can have a variable weight associated with the qualitative questions that affects the final score of the assessments of the organizations.

10.11. Levels

It groups the qualitative questions, the levels are only used as a reference for grouping questions.

10.12. Actions

They group the levels of the qualitative and quantitative questions and services, they can have a variable weight associated with the qualitative questions that affects the final score of the assessments of the organizations.

10.13. Milestones

They are the tasks scheduled to finish in a defined month, at the time of being implemented they must be edited and set as completed.

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