ActivityInfo

HEARTLAND ALLIANCE INTERNATIONAL

Case Study

Serving varying stakeholder needs with a new centralized MIS approach:

From case management and country projects monitoring to strategic progress measurement and improved HQ collaboration, Heartland Alliance International systematizes data management to improve data quality and timeliness

GLOBAL LEVEL M&E

DEVELOPMENT PROGRAMMES

SYRIAN CRISIS RESPONSE PLAN

CHILDREN'S RIGHTS

DISASTER RISK MANAGEMENT & COVID-19 RESPONSE

HUMANITARIAN RESPONSE PLAN

LEBANON CRISIS RESPONSE PLAN

WASH CLUSTER

DISTRIBUTIONS MONITORING

PROTECTION & NFI CLUSTERS

PROTECTION CASE TRACKING & CASE MANAGEMENT

RAPID RESPONSE MECHANISM

REFUGEE & MIGRANT RESPONSE PLAN

EBOLA RESPONSE MONITORING

COUNTRY PROGRAMME MONITORING

BUDGET TRANSPARENCY

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CYCLONE PREPAREDNESS & RESPONSE

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Introduction

Heartland Alliance International is an organization that implements programs in Latin America and the Caribbean, the Middle East and North Africa, Sub-Saharan Africa, and in Chicago at the Marjorie Kovler Center. The organization's technical areas include mental health and psychosocial support, gender equity, access to justice and stigma-free HIV prevention, care and treatment.

In 2022, Heartland Alliance International set the objective to systematize and centralize information across the whole organization via a common, comprehensive system. From country project teams to MEL teams and the Headquarters (HQ), there was the need to improve how information was tracked and how progress was monitored.

Until then, information management was carried out in a decentralized manner in each country, using independent data collection systems such as Kobo Toolbox and CommCare. These systems provided users with access to forms, but lacked a comprehensive platform for efficient management of the data collected.

Decentralization created challenges, as key information was stored with an individual administrator, such as the country manager or a MEAL colleague. This made it difficult to access information in cases of staff turnover or prolonged absences. At headquarters, information related to goals and progress was managed using separate Excel spreadsheets or Access databases. This fragmentation prevented the Headquarters team from effectively showing the progress of the different countries and their projects, as well as progress in each area of the MEL and in the organization as a whole. The lack of a comprehensive platform limited the ability to holistically visualize and analyze essential information for strategic decision making.

"This is when ActivityInfo entered the picture, as a reliable, user-friendly, dynamic and simple system. With it, the country, MEL and HQ team can systematize and centralize all the data. Anyone who has access to the different databases can view information in real time via their computer or mobile device, can check and revise the information online or offline", says Mr. Rangel.

ActivityInfo was selected because its relational database model allows users to create various structures using forms. This has simplified the centralization and management of data in different contexts, including case management and humanitarian aid. The system's visually friendly interface has facilitated its adoption throughout the organization. As a result, internal analysis tools and the ability to integrate with other software have simplified reporting.

This approach has made it possible for various stakeholders to easily visualize the organization's progress towards established objectives.

The choice of ActivityInfo has proven to be crucial not only in terms of operational efficiency, but also in improving transparency and communication within the organization and with external stakeholders.

Thanks to the new system implemented, Heartland Alliance International has managed to avoid dependence on a specific person, since interested parties can directly access the platform to view information. Now, national project users tasked with entering case management data can get a comprehensive view of the work they are carrying out, in contrast to the past where they only had access to the forms they completed.

This change has led to a significant increase in user engagement and comfort with the data and the system itself. Currently, the organization is in the process of structuring and standardizing all processes related to information management in the databases built in ActivityInfo, across the whole organization and they are always exploring ways to make the most out of the platform.

In this Case Study, we will look at various ways Heartland Alliance International leverages ActivityInfo to bring together data from the country, MEL and the HQ team to improve collaboration and progress monitoring for the whole organization.

Case management for country projects: improved data quality and control thanks to a comprehensive overview

Heartland Alliance International is working in several countries such as the Dominican Republic, Colombia, DRC, and MENA countries. In every country, there can be multiple ongoing projects for which there are specific objectives, activities and indicators to monitor.

To support project oversight at the national level, Headquarters works closely with each country's Monitoring, Evaluation and Learning (MEL) teams to establish a system that addresses donor-approved Logical Framework indicators.

In the case of Colombia, the system has been specifically designed to allow the country team, made up of approximately 138 users, to efficiently track individual beneficiaries of each service provided.

This system includes forms intended to collect detailed information about each participant, sector and service received. At the same time, the teams are immersed in the process of developing internal dashboards for the analysis of this information.

These dashboards are designed to showcase the progress of each project, and their primary goal is to keep all stakeholders engaged, including project managers and technical teams.

This system's comprehensive approach supports not only detailed data collection but also its strategic analysis for more informed decision making and effective collaboration.

Using a system such as a ActivityInfo, engages users more in comparison to the past. With previous tools, users adding data didn't have a way to visualize what was happening with the information they collected.

"What happened before with other systems is that users would have access to the data collection tool but they wouldn't know what happened with the information they collected in the different forms. There was a lot of dependence on one individual user, the administrator of the system. With ActivityInfo, users become administrators of their data.

At the same time, ActivityInfo allows us to add restrictions to these users so they can only work with their data, serving data confidentiality and sensitivity requirements. This is something that was very complicated with other tools", explains Mr. Rangel.

The ability for project teams to manage their information directly in the system has resulted in a significant increase in data quality and control. Obtaining real-time information not only simplifies data verification, but also allows the organization to deliver high-quality, reliable data to donors more efficiently. This direct approach to internal data management ensures greater integrity in the information collected.

Additionally, the possibility of working with the data in ActivityInfo through mobile devices or tablets, even in remote areas without an Internet connection, has been essential for those teams that operate in interventions in areas that are difficult to access.

This flexibility facilitates the work of teams in the field, allowing them to keep information updated and thus contributing to the effectiveness of their operations, even in environments with limited connectivity.

"With the previous software or other information systems, because everything was centralized in one person, that person became too loaded and then we would find inconsistencies in the data. Data wouldn't be corrected or cleaned on time inside the system and as a result what we reported could include some errors.

Now with this system, we address the issue of data cleaning and data quality and this helps us with data verification. This is a big achievement because we get information in real time and at the same time we provide reliable and quality information to the donors" adds Mr. Rangel.

In terms of structure, each country database is organized with folders that correspond to individual projects. Within each project folder are specific forms designed to address the particular needs of that project.

For example, the Colombia database features four different folders, each dedicated to a specific project. Each project folder houses forms such as Logical Framework, Case Management, surveys and other forms related to baseline data.

The Logical Framework form is used to provide the project with a comprehensive view of all data linked to the project's objectives, intermediate results, activities and indicators. On the other hand, the Case Management form allows colleagues to enter information about individual participants.

Thanks to the use of subforms, an overview can be obtained of all sectors in which a participant receives support, such as agriculture, protection, food assistance, accommodation, among others. Additionally, satisfaction surveys related to each participant are included in the same context.

This integration makes it easy for the project team to quickly and easily view a participant's history, behavior, and total services received in each sector, providing a complete perspective throughout the case management process.

Dashboards are already in use for the MEL and HQ databases and the team is structuring a dashboard for each country project to facilitate the visualization of the data collected for them.

The dashboard currently under design will be showing the objective, progress, regional target, progress percentage and disaggregated information using gender and age.

# Measuring projects' progress: from three days to three hours

Heartland Alliance International has implemented another integrated system in ActivityInfo dedicated to Monitoring, Evaluation and Learning (MEL). This system is called "Project Indicator Monitoring and Evaluation" (PRIME) and serves as a centralized database in which all countries must report the progress of their projects.

Through the data reported in PRIME, the organization has developed Dashboards that allow monitoring the progress of projects in each country on a monthly basis, generating considerable time savings compared to previous processes.

This centralized and efficient approach to data collection and analysis contributes significantly to more effective oversight and informed decision making at the organizational level.

"For us, doing the monitoring at the global level, we can see the progress of each project, month by month. We can visualize what has been achieved for every indicator, what was the target and the percentage of the progress to it.

These metrics help us understand and monitor what activities have been completed or are in progress and which activities need more attention. This way, we get the information about the performance of the project without the need to consult directly with the project managers in every country", describes Mr. Rangel.
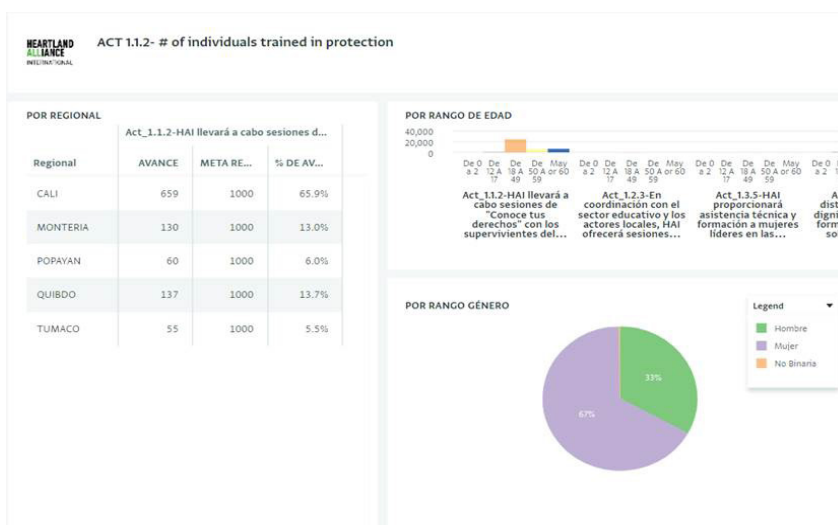
Project dashboard: Activity progress in relation to established goal - MEL Country level

Sometimes, the HQ needs very specific or consolidated information about a project or a sector urgently. In the past, getting that information was time consuming and error-prone and could take up to three days. Today, using the ActivityInfo database, the HQ team can get this information in less than three hours.

"In the past, it took a lot of time because we had to consult with every country, wait for the countries to look into their databases in Excel or other systems, update the information and send it to us. When we received the information, we had to consolidate it and create a report.

Now, we go directly to the system and we get all the information we need and make the reports. It would take two to three days to get and consolidate all the data and now in three hours we have the information we need", adds Mr. Rangel.

Project dashboard: Total project progress results - MEL HQ level

Measuring progress towards the strategic plan and improved collaboration at the HQ

Another way Heartland Alliance International leveraged the platform is via the creation of a database for measuring progress towards the strategic plan, a requirement needed at the HQ level.

The database includes folders with forms for the Strategic Plan of the organization, a Feedback, Complaint and Response Mechanism for various trainings performed, and forms to support the collaboration between stakeholders where meeting notes and other useful stakeholder information are being collected.

"When a team member wishes to know something about a meeting that took place with a donor or another stakeholder, they can enter in the form and view what kind of agreements were made, when, and other information", explains Mr. Rangel.

As for the Strategic Plan, the database includes a form to help track various types of information related to business development for the organization (e.g. number of approved projects, budgets, execution timelines, and results) as well as various other forms.

Last but not least, with the use of a Dashboard, the HQ team monitors the results for key indicators in relation to the strategic plan and shares key insights with teams from different strategic areas. This way they get an overview of information related to proposals' performance for each trimester, how projects are doing at a global level, new areas for interventions and more.

Transitioning to a new system

Currently, new country projects start their work directly in their own databases in ActivityInfo. However, for older projects, the organization faced the challenge of migrating information from the systems previously used in each country to the system integrated into ActivityInfo.

With the support of ActivityInfo's Customer Success team, the organization was able to complete the data migration in a timely manner. Subsequently, invitations were extended to users to access the different databases with specific permissions, thus ensuring that they would only access information related to their work responsibilities.

After implementing a redesign to ActivityInfo's user management system, the organization was able to quickly and autonomously apply permission parameters to users. In terms of user experience, the change was not perceived as drastic, as the organization maintained the structures of the previous forms.

The focus was on training users on how to use the system to follow the internal reporting process, based on the Data Management framework, and understand the user management approach in the system. This strategic approach has contributed to a smooth and effective transition to the comprehensive use of ActivityInfo throughout the organization.

"These trainings were very important for the users because there we explained the structure and how the system is visualized. We started with practical exercises and we performed tests so that users would start to get familiar with the system. We also generated a series of SOPs and this helps them a lot when creating a database.

It was important for them to understand that everything we gather is under the logic of the database structure for case management. This helped a lot. This is because before ActivityInfo, they would only see a form not a system.

Now, thanks to their access, they can see a system and have a panoramic view of everything they are doing. So they like this a lot and they say that they feel more comfortable because they can visualize what they are doing. This has been a great achievement because the system facilitates them", adds Mr. Rangel.

As for the design of new databases and forms, the process empowers each country's MEL team to create the structures necessary for their projects on their own. Each MEL team has access to a template of forms developed by the HQ and thanks to the training they received, they are able to adjust them and create new forms to match the needs of each project's logframe. Once the form structure is created, they share it with the HQ team, which makes sure to move it and implement it in the official project database.

This way, the HQ team ensures all forms are linked correctly and manages user permissions and invitations. Once the forms are added to the database, the country team is invited with the role of administrator and they are allowed to do any further changes, if needed, always in coordination with the HQ.

The next collaboration step is to enable users to do data analysis internally directly within the system so as to support them in following their interventions better and on their own.

Conclusion

Heartland Alliance International has leveraged ActivityInfo's relational database model to strengthen collaboration and project tracking across the organization.

The platform is used in a variety of ways, ranging from case management on national projects to monitoring organizational progress against the strategic plan, as well as detailed monitoring of individual national projects.

Anticipating the future, the organization aims to centralize all organizational information in ActivityInfo, seeking to maximize the full potential of this platform. This strategic approach demonstrates a clear commitment to operational efficiency and strengthening data-driven decision making across the organization.

"We have given the instruction for the project budgets that the only information system that can be applied for centralizing data is ActivityInfo. Through the system we will be able to generate all the reports that have to do with internal or donor requirements.

So all the people involved in data collection or data entry can have access to the system and systemize all the information we need", concludes Mr. Rangel.

What is ActivityInfo?

ActivityInfo is provided by BeDataDriven B.V., a private company based in The Hague in the Netherlands.

It is an information management platform used for monitoring & evaluation, humanitarian coordination and case management. For over a decade, the ActivityInfo team has been supporting humanitarian operations and development programmes worldwide with a secure, flexible and cost-effective solution for data collection, data management and analysis.

ActivityInfo is used to centralize and standardize data collection, monitor and display the impact of activities while maintaining complete control on data access and changes.

Non-technical colleagues can quickly start tracking key indicators from project outputs to strategic impact using a user-friendly database and form builder, an intuitive data collection interface and various reporting capabilities.

Using the ActivityInfo mobile app to collect data online or offline, they save time and avoid errors from moving data between tools. Then, built-in analysis tools or integrations with other software allow for rich insights within minutes.

ActivityInfo builds on the company's 14 years of research and practical experience developing information management systems for humanitarian and development projects.

Originally developed for UNICEF's emergency program in eastern DRC, ActivityInfo has evolved into a mature project and is now used daily by hunderds of organizations working in humanitarian relief, reconstruction, and development assistance worldwide.

Learn more about ActivityInfo: https://www.activityinfo.org/

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For a customized demo for your organization, never hesitate to contact us at: info@activityinfo.org