ActivityInfo

Best Practices for use of evidence

For M&E professionals and Program Managers
Presented by the ActivityInfo Team

Software for Monitoring & Evaluation

- Track activities, outcomes
- Beneficiary management
- Surveys
- Work offline/online

ActivityInfo
Evidence based decision making

Webinar #1: Quality use of evidence

Webinar #2: Best practices for use of evidence

Incentive for this webinar series:

- The fundamental key is to raise awareness upon evidence and the quality of evidence
- Raise awareness on the available tools and best practices that enable us to use evidence
- There exist significant improvements towards evidence based decision making, but there is room for improvement.
Today’s session objective

- Pathway from data collection to data use and learning and how this is associated with the project life implementation cycle?
  - What is the role of MEAL system design in evidence based decision making?
- The importance of planning for data use: the enabling factor at the project design and launch phase
  - How the MEAL plan (or PMP), the learning questions development and the establishment of Feedback, Complaint, Response, Mechanism (FCRM), the stakeholders communication plan and the evaluation planning contributes to this end?
- Project implementation: best practices and tools that improve evidence-based adaptive management, project decision-making and learning
  - The importance of data interpretation workshops and projects review meetings
  - The importance of a data analysis plan and light monitoring techniques
  - The importance of technology
Presentation outline

Overview

● Quality and use of evidence: key messages
● The project life implementation cycle and the pathway from data collection to data use and learning
● The importance of planning for data use: best practices and tools
● Project implementation: best practices and tools
● QandA
Quality and use of evidence: Key messages
Quality and use of evidence

Key messages

- The failure to **generate and use evidence** makes humanitarian and development action **less effective, less ethical and less accountable**.

- The **quality of evidence reflects** the extent to which information that relates to a specific proposition **can be trusted**, and **thus used**.

- Both the **data**, and the **methods** used to analyze this data, should be **measured** against specific quality criteria.

- Mitigation of threats to quality **does not guarantee** the use of evidence.

- Evidence has to be **accessible** when the decision is being made!!!
Quality and use of evidence

Key messages: five guiding principles for evidence-based decision making

- Use robust methodologies for analysis and collection
- Increased collaboration internally in an organization and externally
- Ensure that investments in evidence match the importance of the questions addressed
- Thinking of the longer term
- Include the knowledge of people affected
The project life implementation cycle and the pathway from data collection to data use and learning
The project life implementation cycle and the pathway from data collection to data use and learning

Project life implementation cycle

Phase one
Needs assessment and analysis
Encourage learning after

Phase two
Strategic planning
Use learning from phase one

Phase three
Resource Mobilization

Phase four
Implementation and monitoring
Encourage learning during

Phase five
Operational peer review and evaluation
Encourage learning after

Source: https://www.humanitarianresponse.info/en/programme-cycle/space
The project life implementation cycle and the pathway from data collection to data use and learning

Pathway from data collection to ACTION

**Step 1**
- **Quantitative data:** Data cleaning and calculations as per data analysis and MEAL plan
- **Qualitative data:** Data cleaning, cleaning, coding as per data analysis plan

**Step 2**
- **Quantitative data analysis and visualization**
- **Qualitative data analysis**

**Step 3**
- **Data Interpretation**
  - Bring quantitative and qualitative data together
  - Validate findings
  - Attach meaning
  - Draw conclusions

**Step 4**
- **Action:** problem solving, adaptive management, reporting and documenting lessons learnt

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**GENERATE EVIDENCE**

**USE EVIDENCE**

**LEARNING**
The project life implementation cycle and the pathway from data collection to data use and learning

How everything fits in together?

The MEAL system design needs to start at strategic planning phase

The MEAL system enables the exercise of guiding principles

The pathway from data collection to Action is enabled by the MEAL planning

**a well established MEAL system is the “heart” of evidence based decision making**

**Learning is the enabling “vehicle” to increase efficiency and accountability**
The importance of planning for data use
The importance of planning for data use

When do we start to plan?

- **Before implementation**
  - **Strategic planning**
    - Proposal development and logic models development
  - **Day 0 of implementation**
    - **Plan MEAL system**
      - Collaborate with key stakeholders to validate strategic planning components and develop MEAL plan, preliminary learning questions, FCRM planning, evaluation planning
  - **Later during implementation**
    - **Design and launch**
      - Design; Digitalize systems in place, data flow map, data collection forms, learning plan, MEAL calendar, stakeholder communication plan
      - Launch: Orientation and training
    - **Implement and use**
      - Implement the MEAL system. Collect and use the data via frequent project review meetings. Produce learning for current project and encourage cross project learning

Use learning for future projects internally and externally. Revise system as you go.
The importance of planning for data use

The MEAL enabling tools for evidence-based decision making

<table>
<thead>
<tr>
<th>Project life cycle phase</th>
<th>MEAL system design tools</th>
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<tbody>
<tr>
<td>Strategic planning</td>
<td>Logic Models Design:</td>
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<td></td>
<td>- Theory of Change</td>
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<td>- Results Framework</td>
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<td>- Logical Framework</td>
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The importance of planning for data use

Strategic planning: the importance of logic models

Theory of change
- long term change
- pathways of change

Results Framework
- project hierarchy
- causal logic of the model

Logical Framework
- indicators
- means of verification
- assumptions

source: https://www.pm4ngos.org/meal-dpro-guide/
The importance of planning for data use

Theory change: Best practices

- Consider the assessment data.
- Use a tested conceptual framework.
- Include relevant stakeholders with programming team to play the core role.
- Treat ToC as living document.
- Consider blind spots and prevailing myths. The importance of bias!
The importance of planning for data use

Results Framework: Best practices

- Crucial to acknowledge the role of programming teams to identify the components that are direct responsibility of the team.
- Builds upon the assessment data.
- Crucial to consider needs prioritization.
- Crucial to consider appropriateness of the intervention – affects the relevance of data collected.
- Crucial to balance out resources; financial and capacity.

This is the starting point where we consider the type of information we need
The importance of planning for data use

LogFrame: Best practices

- Indicators: start thinking early in the process the type of information that you need.
- Avoid nice to know information: How many indicators?
- SMART indicators only – direct or indirect.
- Consider light monitoring techniques.
- Identify opportunities to use secondary data sources.
- Consider Measurement methods early enough. Balance out available resources.

Now it is time to think on how you plan to use information. This will affect: type of indicators, data collection modality and frequency under the MEAL plan.
The importance of planning for data use

LogFrame: Best practices

source: https://www.crs.org/our-work-overs eas/research-publications/propack-i -crs-project-package
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The MEAL enabling tools for evidence-based decision making

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<tr>
<td>During early implementation</td>
<td>- MEAL plan (or PMP)</td>
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<td>- Learning questions development</td>
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<td>- Feedback Complaint and Response Mechanism</td>
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<td>- Stakeholder communication plan</td>
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<td>- Evaluation planning</td>
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The importance of planning for data use

During early implementation: MEAL plan

<table>
<thead>
<tr>
<th>OBJECTIVES STATEMENTS</th>
<th>INDICATORS</th>
<th>DATA COLLECTION</th>
<th>MEANS OF ANALYSIS</th>
<th>USE OF INFORMATION</th>
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<td>METHOD</td>
<td>FREQUENCY</td>
<td>PERSON RESPONSIBLE</td>
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<td>STRATEGIC OBJECTIVE 1</td>
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<td>STRATEGIC OBJECTIVE 2</td>
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<td>INTERMEDIATE RESULT 1.1</td>
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<td>INTERMEDIATE RESULT 2.1</td>
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<tr>
<td>OUTPUT 1.1.1</td>
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<td>OUTPUT 1.1.2</td>
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<tr>
<td>KEY ASSUMPTIONS</td>
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<td>ASSUMPTION 1</td>
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<td>ASSUMPTION 2</td>
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source
https://mealdprostarter.org/performancemanagementplan/
The importance of planning for data use

During early implementation: MEAL plan (or PMP)

- Establish clear target and baseline.
- Consider the relevant disaggregation – needs assessment as information source.
- Balance out resources in the data use and consider the data flow.
- Complete the MEAL plan related information – this will guarantee that indicators are SMART.
The importance of planning for data use

During early implementation: Learning questions

- Consider how we can best use information included already in MEAL plan. There is not always the need for additional data collection.
- Discussions focused on the reflection on action planning based on pre-established learning question can be included as part of the project activities.

Important for adaptive management and organization learning
The importance of planning for data use

During early implementation: Feedback Complaint and Response Mechanism (FCRM)

source: https://www.pm4ngos.org/meal-dpr-o-guide/
The importance of planning for data use

During early implementation: Feedback Complaint and Response Mechanism (FCRM)

- This complements the data collection needed on top of MEAL and learning plan.
- Do not forget the participatory assessment prior to FCRM.
- Do not forget that also these data play an important role in adaptive management: analyze, visualize and interpret!
The importance of planning for data use

During early implementation: Stakeholder communication plan

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Information needs</th>
<th>Frequency</th>
<th>Means of communication</th>
<th>Materials needed</th>
<th>Responsible</th>
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During early implementation: Stakeholder communication plan

04 Stakeholder communication plan

- Consider all stakeholders and their information needs.
- This will support the MEAL plan data use.
- Don’t assume that a single communication method will work for all stakeholders.
The importance of planning for data use

Evaluation planning: Best practices

All projects should include some sort of evaluation activity. Projects that do not include a formal evaluation should, at minimum, plan for an after action review.

- Evaluations are associated with a large cost, thus planning early is the key to incorporate them in the process.
- The type of evaluation you do and the timing of your evaluation(s) will be dictated by your information needs and the related evaluation questions you identify.
- The MEAL plan can support in reducing evaluation data collection costs.
The importance of planning for data use

Key messages

- MEAL plan design process is the core of planning for data use.
- Include key stakeholders – programming teams have a key role in the design phase!
- Think realistically: always consider resources (time and budget).
- Tools mentioned: Logic models, MEAL plan, learning questions, stakeholders communication plan, FCRM, evaluation planning.
Project implementation: best practices and tools
Project implementation: best practices and tools

Tools and processes which enable evidence based decision making during implementation

- Data interpretation meetings
- Project review meetings
- Data analysis plan
- Light monitoring
- Use of technology
Importance of data interpretation meetings

● A great opportunity to address bias by triangulation of stakeholders’ perspectives.
● Key questions for data interpretation meetings:
  ○ What do data tell us?
  ○ What factors explain the findings?
  ○ What factors affect difference across comparison groups?
  ○ What information do we miss to conclude regarding the topic of interest?
Importance of project review meetings

- Crucial for adaptive management.
- A project review meeting broadly addresses the following topics:
  - What has worked well in the project.
  - What has not worked well and how to improve - action planning.
  - What has and hasn’t worked well in the MEAL system in place – action planning.
- Consider frequency and modality:
  - Incorporate meeting into already established project meetings and consider when a focused project review meeting is needed.
  - Incorporate project meeting into MEAL plan and MEAL calendar.
**Formal monitoring**: Tracking progress against project activities and indicators.

**Light monitoring**
Provides timely feedback on new activities and checks for early signs that progress is being made and that assumptions are holding true while there is still ample time to make adjustments if necessary.

**Rigorous monitoring**
Collects representative data for evidence-based project management, reporting and learning, not just at midterm but throughout project implementation.

Importance of data analysis plan

Data analysis plan describes the data collection process. Key components are:
- the sampling frame and methodology
- data collection timing and mode
- data analysis methods and quality checks
- roles and responsibilities

Key to quality of data collection and analysis

- Builds upon the MEAL plan.
- Crucial for extra data collection activities, especially for evaluation activities.
- Facilitates data analysis and generation of quality of evidence.
Project implementation: best practices and tools

The use of technology

Use of technology

- Real time data
- Easier data analysis
- Easier data sharing with relevant stakeholders

which is the most common threat to this pathway?

The existence of parallel systems!!!
What is a “parallel system”?
**ActivityInfo Case study**
Multi-partner reporting with UNOCHA Iraq: from standardized forms to an innovative dynamic dashboard (Dashboard 2020)

“The most important thing for us as in OCHA Iraq is that ActivityInfo is suitable for partner-based reporting. If you look at other tools, they are all for high-level reporting. They start from the cluster that is reporting. The cluster needs to collect data from the partners, then compile it and then put it in the system. In ActivityInfo it starts from the partner. So that is why we insist on using ActivityInfo, because we are getting the data in real-time. (....)”, UNOCHA Iraq Information Management Officer

Importance of using one integrated system for data collection

Multi-partner reporting with UNOCHA Iraq: from standardized forms to an innovative dynamic dashboard
Key messages

- Bring the relevant stakeholders in one common room! Reflection upon information gathered is a core component of the process of data use!
- Incorporate light techniques when you have limited time.
- Data analysis plan can improve quality of data collection and analysis.
- Use technology to your advantage.
Time for Q&A!
Thank you!