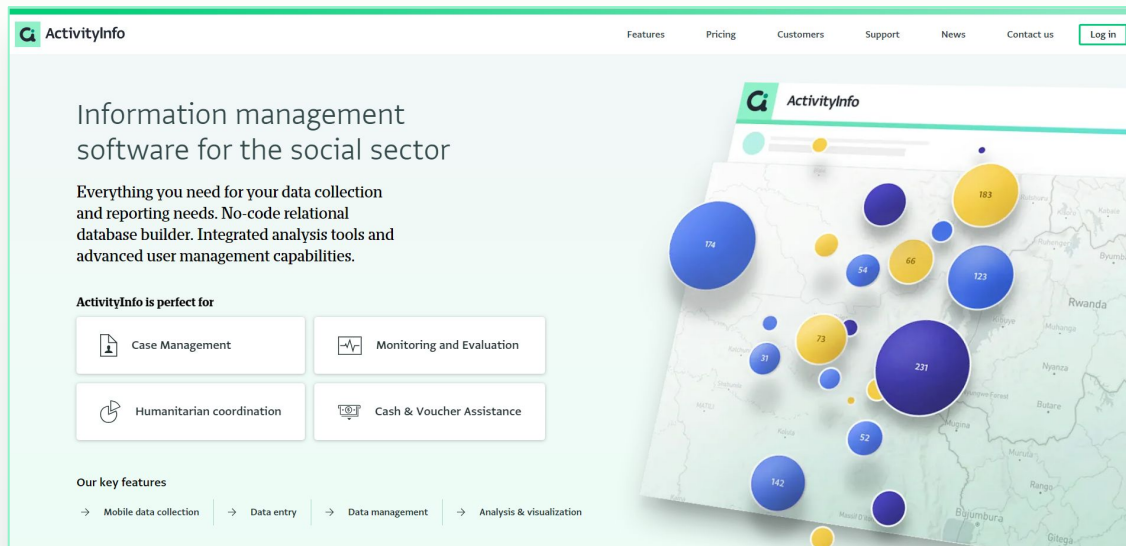**ActivityInfo**

From data to results: data utilization for M&E systems

Starting shortly, please wait!

Presented by the ActivityInfo Team

All in one information management software for humanitarian and development operations.

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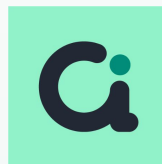- Beneficiary management
- Surveys
- Work offline/online

BeDataDriven Mission

Provide the UN and NGOs with a standard, easy-to-use and comprehensive data management platform so that as many organizations as possible can become data-driven to achieve better outcomes for rights holders worldwide.

BeDataDriven pursues this mission by building and helping organizations implement ActivityInfo.

ActivityInfo
An end-to-end solution for M&E data management

Data collection

Easily collect the data you need from anywhere

Data management

Organize your information according to your workflow

Data analysis

Generate actionable insights in real-time
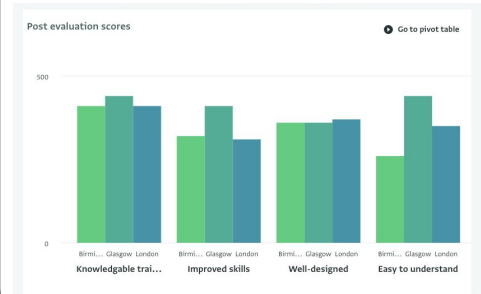
....built on a relational data model

ActivityInfo is your **integrated** solution for managing your data across the data lifecycle.

8. INTERPRETATION
1. GENERATION
2. COLLECTION
3. PROCESSING
4. STORAGE
5. MANAGEMENT
6. ANALYSIS
7. VISUALIZATION

ActivityInfo Users

Meet your instructor

Eliza Avgeropoulou
Senior Monitoring and Evaluation Implementation
Specialist
BeDataDriven

Outline

- Introduction
    - The evolving role of data in Monitoring and Evaluation
    - Common challenges in data use
- How to address the challenges? Building quality from the ground up
    - An M&E system that leads to data collection of high quality
    - Bridging the gap between data and action
- QandAs

Introduction

The nature of our work

Organize

Define

Complex reality

Simple use

Emergent

Non - linear

Adaptive

Complex Systems

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The evolving role of data in Monitoring and Evaluation

Actionable Insights

Transparency

Localization

Data

Data-Driven Decisions

Participatory approaches

Data governance
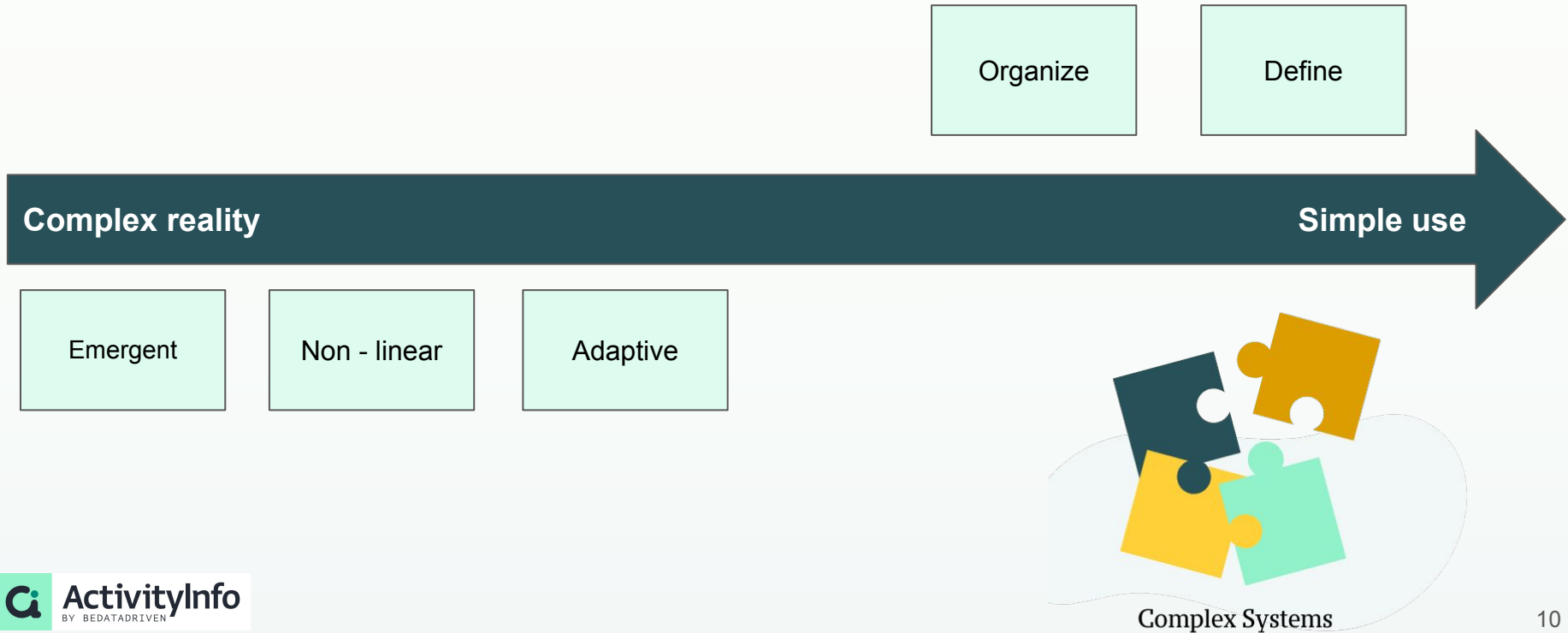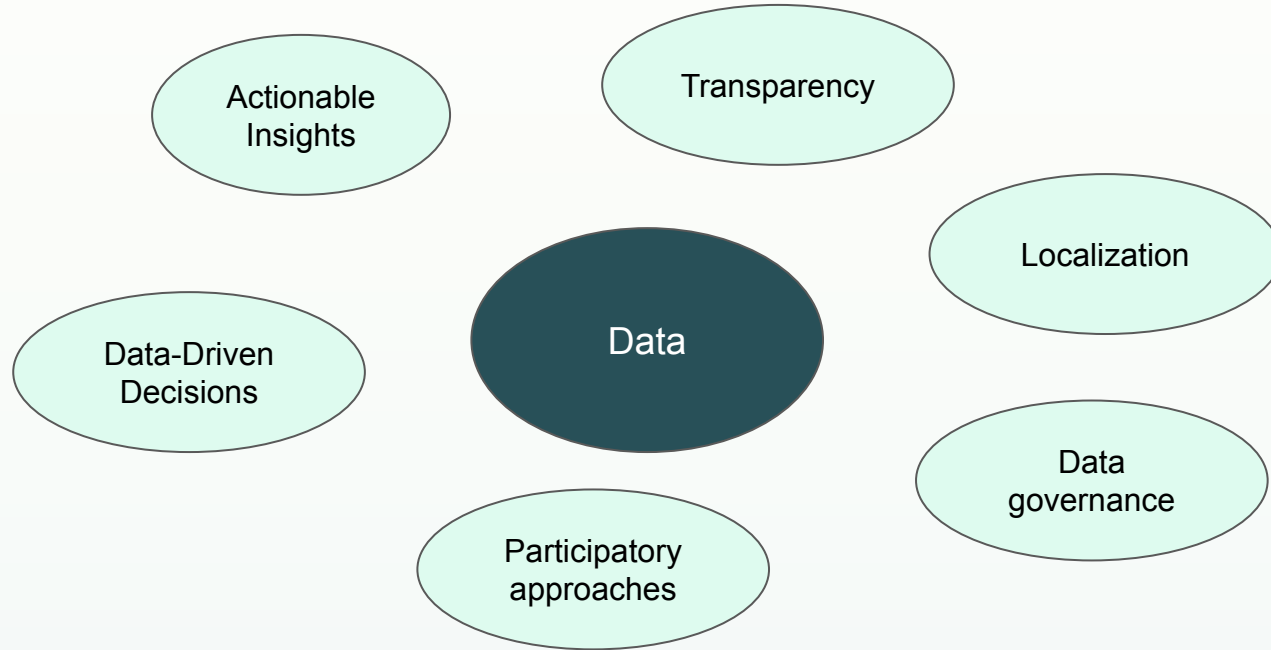
Data helps us to understand a complex reality **and technology** serves as a mean to an end

The starting point

M&E system design	Information management system design

Real time data collection

Data transformation

Data analysis

Real time data Use

✓ Level of implementation: Project, country, region, global
✓ Policies and procedures in place: data collection, use, analysis, storage
✓ Capacity building approach across all levels of implementation
✓ Integration with existing systems

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Starting point

✓ Policies at organizational level ✓ Team structure across all levels ✓ Organizational capacity building	**Project design**	✓ M&E planning documents translated into information management system - Data model ✓ Capacity building tailored to needs ✓ Policies turn into specific procedures
	Project Implementation	✓ M&E and IMS maintenance and monitoring ✓ Refresher training

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The role of information management system

Data collection

Data organization

People

Technology

Information management

Data use

Processes

Data processing

Data governance
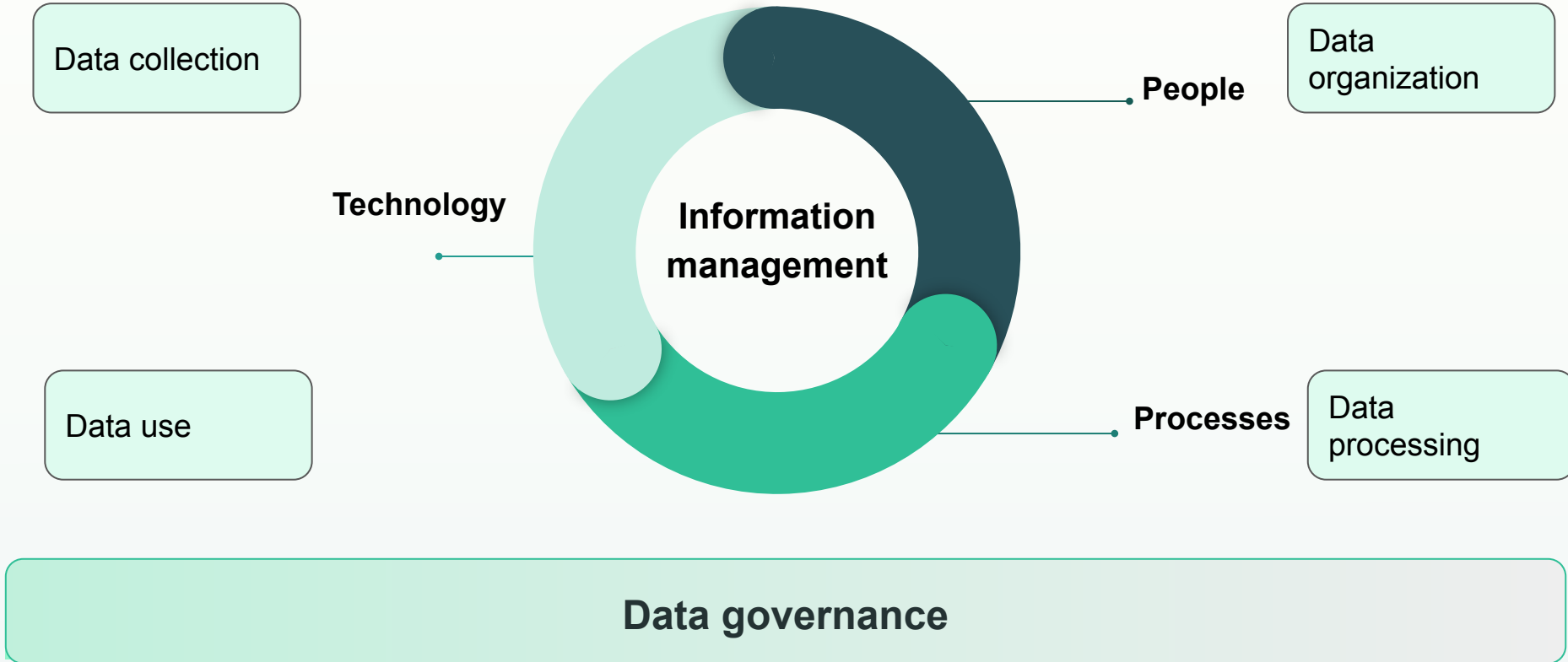
From M&E system to IMS design

M&E system design	Information management system design	Data Use

Project logic	M&E plan

Data use planning	Responsibilities

System Choice	Data Model

Reports design	Data quality

Organizational policies	Country/project procedures

Capacity building

A well thought out system creates incentives for use

Common challenges

People

Process

Tools

Reliability

Lack of knowledge:
- to establish the M&E system
- To establish an Information management system

- on how to create, maintain and implement policies and procedures

- **Lack of appropriate tools or tools do not match needs**

Compliance

- **Lack of knowledge** of field staff on how to perform data collection

- **Lack of** data collection and analysis **processes**

- Data captured in **non compliant way**

Actionable

- Lack on how data analysis and use can be performed
- Absence of ability to **take action** based on data analysis
- Lack of documented processes

- **Lack of access** to data

Lack of motive to use the system

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How can we address the challenges?
Building quality from the ground up

Case study

- The Republic of Serenia,has become a primary destination for refugees and asylum seekers fleeing conflict, and political instability in neighboring nations.
- Over the past six months, Serenia has experienced an unprecedented influx of displaced populations.

Organizational profile

- Global Headquarters: Global IT and M&E staff
- Regional Offices: in 4 different locations. Regional M&E and IM staff responsible for country offices
- Country Offices: In over 30 countries worldwide
- Staff: Over 5,000 employees, including both international and local staff

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18

Case study

Program

In collaboration with UN, we implement a cash plus project focused on the following key outcomes:

- Refugees, asylum seekers, and vulnerable host community members are able to meet their basic needs via unconditional cash transfers
- Refugees, asylum seekers, and vulnerable host community members use information in order to navigate the host country

People

Overcoming challenges

People	Reliability	Compliance	Actionable

People

✓ Regional M&E staff and IM staf

✓ In country M&E staff and IM staff

✓ In country manager and supervisor

✓ Partners' manager, supervisors and M&E staff

✓ Partner's field data collectors

Reliability

Regional level:
- Technical skills
- Ability to support in country staff while understanding the context
- Ability to provide organizational resources
- Ability to understand the implementation of policies

In country staff:
- Technical skills
- Ability to understand and implements organizational policies and procedures
- Ability to create resources, procedures at country level
- Ability to capacitate staff

Partners' staff
- Ability to understand and implement partner organization and main organization policies and procedures
- Ability to supervise
- Ability to capacitate staff

Capacity building

People

- ✓ Regional M&E staff and IM staf

- ✓ In country M&E staff and IM staff
- ✓ In country manager and supervisor

- ✓ Partners' manager, supervisors and M&E staff
- ✓ Partner's field data collectors

Capacity building approach

Training of Trainers:
- Policies and procedures
- M&E system implementation
- Information management system implementation
- Library and resources

Training of field staff:
- Policies and procedures
- M&E system implementation
- Information management system implementation
- Library and resources

Design

Implementation

Use

22

Capacity building

Prior to training

Understand the audience preferences and needs:
- Conduct mini surveys, or assessments to identify existing knowledge and what is preferred training modality

During training

- Tailor the training content to align with the responsibilities of the staff members.
- Break down the training content into manageable chunks or modules. Present information in a logical and sequential manner
- Provide hands-on exercises and interactive activities to actively engage participants in the learning process.
- Use clear and concise language in your presentations. Avoid jargon and technical terms whenever possible.

Following training

- Feedback and Evaluation: Regularly seek feedback from participants.
- Recognize that training is an ongoing process. Offer refresher courses, advanced training

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Process

Overcoming challenges

Process	Reliability	Compliance	Actionable

Process

✓ Regional **policies** on M&E system design, data collection, access and use

✓ In country, **procedures** on M&E system design, IMS implementation

✓ Partner **procedures** on IMS implementation.

Regional policies in M&E minimum standards, data privacy and access, data collection and quality, data analysis and quality, IMS system minimum standards

Turn into

Country procedures in:
- Steps, roles and timing of M&E system and IMS design
- Data collection procedures and roles within IMS
- Data quality procedures
- Data analysis and use procedures

Turn into - LOCALIZATION

Partners:
- Update and complementation in internal policies and procedures
- Incentive and localization

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Data quality

Validity	Reliability	Integrity	Actionable
Does the data clearly and adequately represent the intended result? Would an expert third party agree that the indicator is a valid measure for the stated result?	Are the indicator definition and data collection and analysis processes clear and are these consistently applied over time?	Do the data collection, analysis and reporting processes have clear mechanisms in place to reduce manipulation?	Is the data sufficient, timely and current (recent) to influence management decision-making?

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The core concepts in implementation

M&E system design	Information management system design

- ✓ Identification of data needs
- ✓ Identification of analysis
- ✓ Identification of reports
- ✓ Roles and responsibilities

- ✓ Identify data collection forms
- ✓ Identify unique identifiers of each form
- ✓ Identify relationships across forms
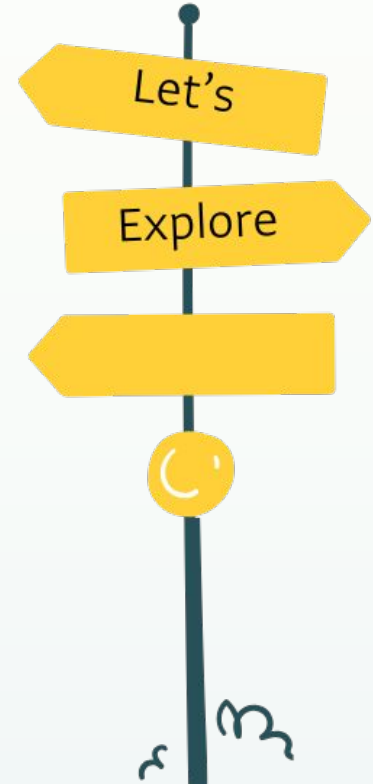- ✓ Identify the reports needed

M&E plan is the key

Data model is the key
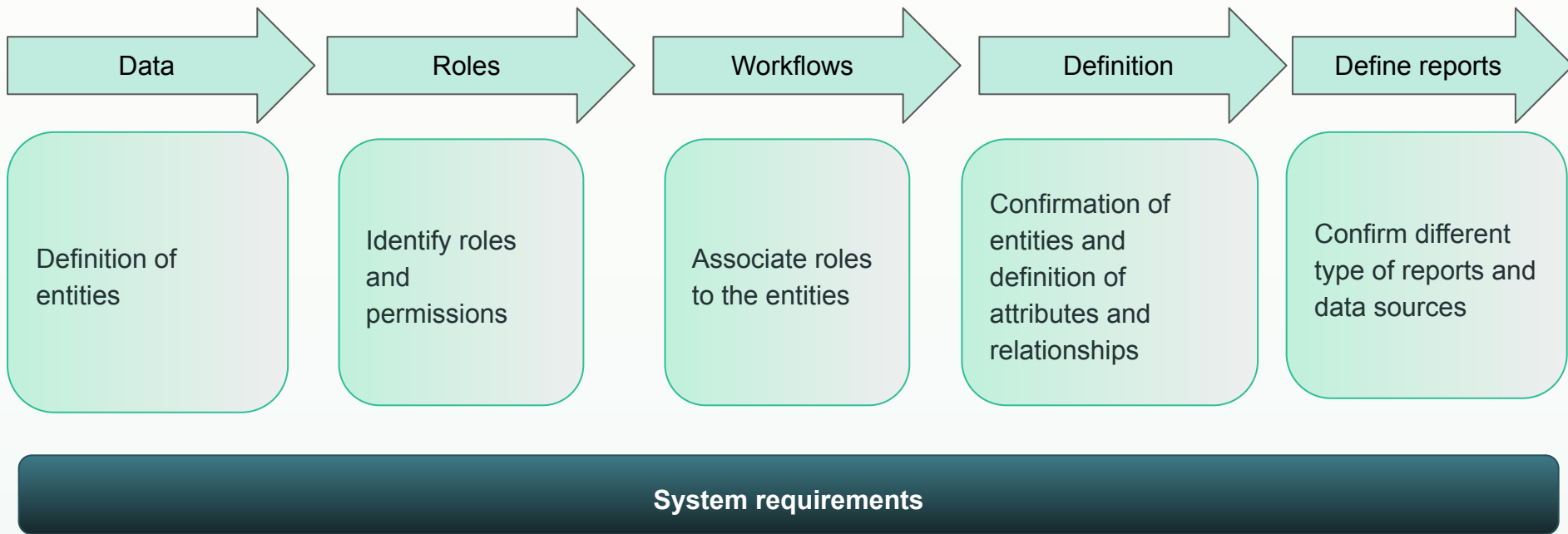
From M&E system to IMS

ELEMENTS	OBJECTIVE STATEMENT	Indicator	Target	Definition	Data Collection							
					Method	Sample method	Baseline	Data collection modality	Person who collects the data	Frequency of Data Collection	Respondents	
GOAL	Refugees, asylum seekers, and vulnerable host community members achieve self-reliance, contributing positively to their host communities while living with dignity and security.	Target population reported improve self-reliance INDEX	80%	Self-reliance: this will be specified by FGDs	Annual Survey based on self reliance index questionnare and on the community definition by the FGDs. We will compare household who based on the vulnerability assessment it was close to the limit. (Does / Non Doers analysis)	Stratisfied random sampling per governorate	No	ActivityInfo mobile application in the relevant form	Data collectors partner organization	Survey: Annualy FGDs: At the beginning of project implementation	HoH	D
STRATEGIC OBJECTIVE 1	Target population meet their basic needs	target population whose basic needs are met with cash or in cash contribution during the past 4 weeks	80%	Basic needs: Food, clothes/shoes, hygiene items, health costs, trasporation	PDM	Random sample per governorate based on monthly payment lists	No	ActivityInfo mobile application in the relevant form	Data collectors partner organization	monthly	HoH	
		Number of individuals use cash	500000	Used: withdraw cash from ATM or make direct payments via POS	Extract from financial provider	does not apply	No	Financial provider system extracts are imported via script into ActivityInfo	Data management team internally	monthly	does not apply	
		percentage of target population s use cash	80%	Received: succesfull payment by the financial provider	Extract from financial provider	does not apply	No	Financial provider system extracts are imported via script into ActivityInfo	Data management team internally	monthly	does not apply	
Intermediate Result 1.1	Target population use cash or in kind assistant to meet their household's essential needs	percentage of target population who reports access to adequate housing, healthcare, and education.	80%	adequate: based on ECHO indicator and shpere standards of the "adeuqate interpretation"	PDM	Random sample per governorate based on monthly payment lists	No	ActivityInfo mobile application in the relevant form	Data collectors partner organization	monthly	HoH	
		Total amount of cash assistance provided	3b	defined	Extract from financial provider	does not apply	No	Financial provider system extracts are imported via script into ActivityInfo	Data management team internally	monthly	does not apply	
	Cash or in-kind assistance distributed to	Total number of recipients						Financial provider system extracts are imported via script into	Data management			

Towards the data model

Let's explore how can we proceed in an engaging way by using the <u>following board</u>

Data model steps

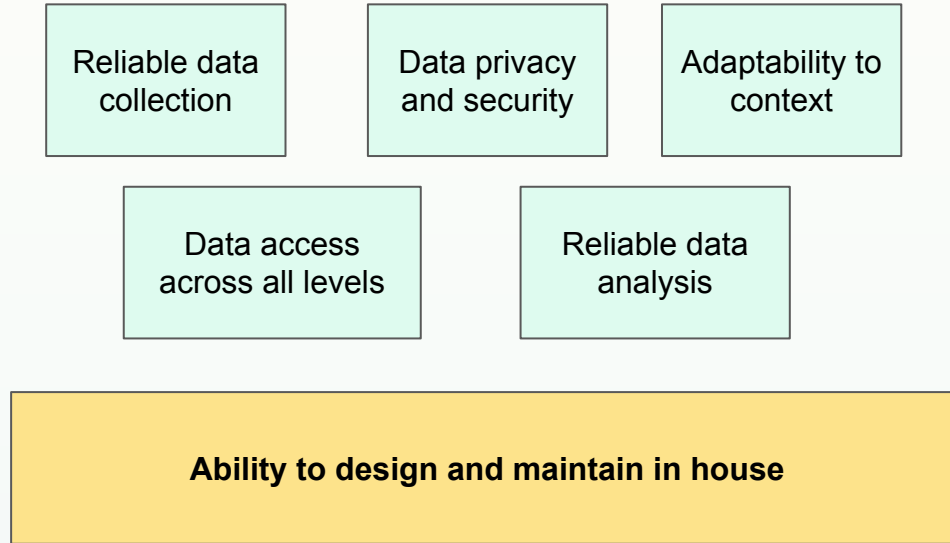| Data	Roles	Workflows	Definition	Define reports
Definition of entities	Identify roles and permissions	Associate roles to the entities	Confirmation of entities and definition of attributes and relationships	Confirm different type of reports and data sources

System requirements

Why do we need a data model?

- Security
- Organization
- Data Integration
- Scalability
- Documentation
- Communication

Simplify →

Monitor, Evaluate and Learn

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Tools

What do we need from a tool?

Reliable data collection

Data privacy and security

Adaptability to context

Data access across all levels

Reliable data analysis

Ability to design and maintain in house

Data quality

Quality

Do the data collection, analysis and reporting processes have clear mechanisms in place to reduce manipulation?

Have I reduced data redundancy?

Have I designed clear roles and responsibilities?

- **Process** that supports
  - Frequent data review by different levels within the organization
  - Periodic monitoring and review of the system
  - Monitoring and reporting of data security incidents
- **Tool** that supports:
  - Data validation
    - Skip logic
    - Validation logic
    - Calculations to reduce data collection
  - Data review and duplication
  - Clear roles and responsibilities
  - Monitoring
    - Detailed users actions

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Data quality: example

Data quality

I am working at the HQ and I wish to design an information management system maintained in house and I have a minimum coding experience. I am very interested in enforcing the best practices that you mentioned, how can I do that?

Beneficiary Registration ⌄ Expand

SECTION HEADER
General Information

TEXT
Date of registration
READ-ONLY
FORMULA: TEXT(NOW())   🚫 HIDDEN

MONTH
Month and year   REQUIRED

USER
Name of data collector

REFERENCE
Governorates per partner

CALCULATED
BENE Main ID   UNIQUE
FORMULA: CONCAT(CX2KHG5M6JDS8I43B, CBOFU5EM6JD9G3O3O.GOVERNORATES.GOV_CODE,
CBOFU5EM6JD9G3O3O.@PARENT.P_CODE)

Adaptability and localization is key

- Different modality of data collection adapted to users' needs
- Adaptation and scale up of forms for other projects within the country or in other countries
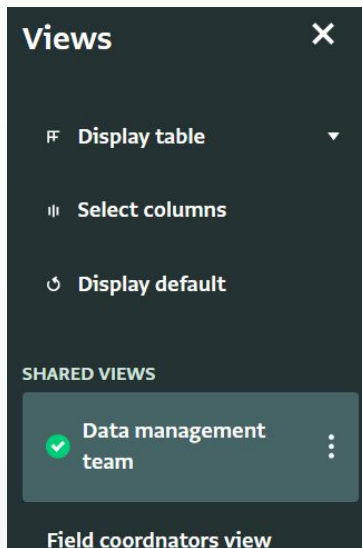- Translation in local languages

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Data access promotes use

- Ability for field staff to access the data perform live changes
- Ability to create different views to accommodate different roles data needs
- Ability to provide view only access to secondary analysis data to external stakeholders
- Ability to integrate data with multiple systems

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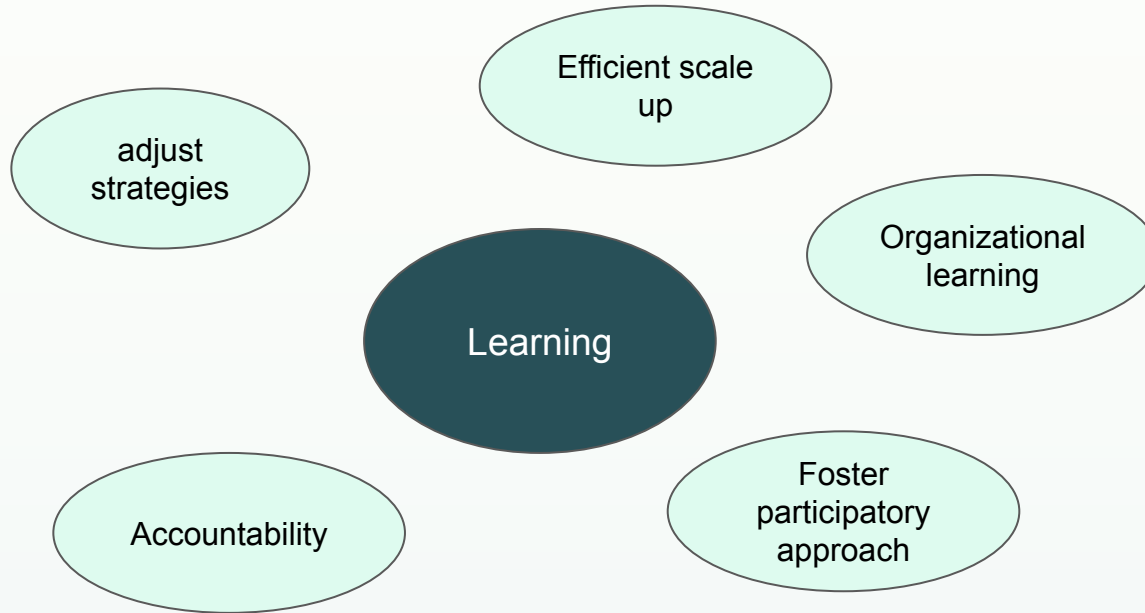BY BEDATADRIVEN

Data access: example

Data access

I am the field data manager of the partner and I want to know which registration records is approved.
What can I do?

Views ✕

FF **Display table** ▾

ılı **Select columns**

↻ **Display default**

SHARED VIEWS

✓ **Data management team** ⋮

Field coordnators view

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Bridging the gap between data and action

The importance of learning

adjust strategies

Efficient scale up

Organizational learning

Learning

Accountability

Foster participatory approach

Learning and adaptive management

- Which the main learning questions?
- Why do I want to learn?
- How do I learn? From which data sources?
- How do I use efficiently the learning outcome?

- Learning plan
- Reflection session (or after action review) scheduled periodically within the project or broader team led by the program manager
- Feedback loops
- Real time monitoring

Learning and adaptive management

Learning plan

Learning questions:
- Build upon the M&E plan
- In aims to respond more in depth question during project implementation
- Analyse in a different way existing data

Example:
- What practices target population use in order to navigate into a X specific service into the host country?

Learning and adaptive management

Reflection

Main questions:
- What has worked well?
- What has not worked well and why?
- What can we do in order to address the challenge? When? Who will take the lead?

Leads to a detailed action planning

Incorporated into the M&E plan and project activities

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Learning and adaptive management

Mechanism in place in order to identify:
- Complaints
- Recommendations
- Any requests (information and service)

Sensitive information with a different categorization can also be part of the mechanism. Target any relevant stakeholder

Creation of SoPs for classification and implementation Can be part of any reflection event

Embedded in one integrated tools as the rest of program data

00 Country level feedback

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Learning and adaptive management

Real time monitoring

- Real time use of monitoring data
- Embedded into the M&E plan: Lower levels
- Light monitoring techniques (existing data or qualitative methods)

Available reports across different levels of the team in order to be able to identify patterns.

Capacity building on how this information is used and interpreted is crucial.

01 Complete Monitoring Report

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Key messages

- M&E system and IMS are interconnected. The M&E system drives the design for the IMS.

- The M&E plan acts as the key document of the M&E system which in turns leads to the starting point of the IMS design - the data model.

- The capacity building is a key to both systems design and implementation.

- Data quality policies and procedures create a well functioned system.

- Thinking early in any project start up, creates well designed system, thus providing incentive for use.

Questions?

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LinkedIn group: https://www.linkedin.com/groups/5098257/

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