



ActivityInfo

From cases to evidence

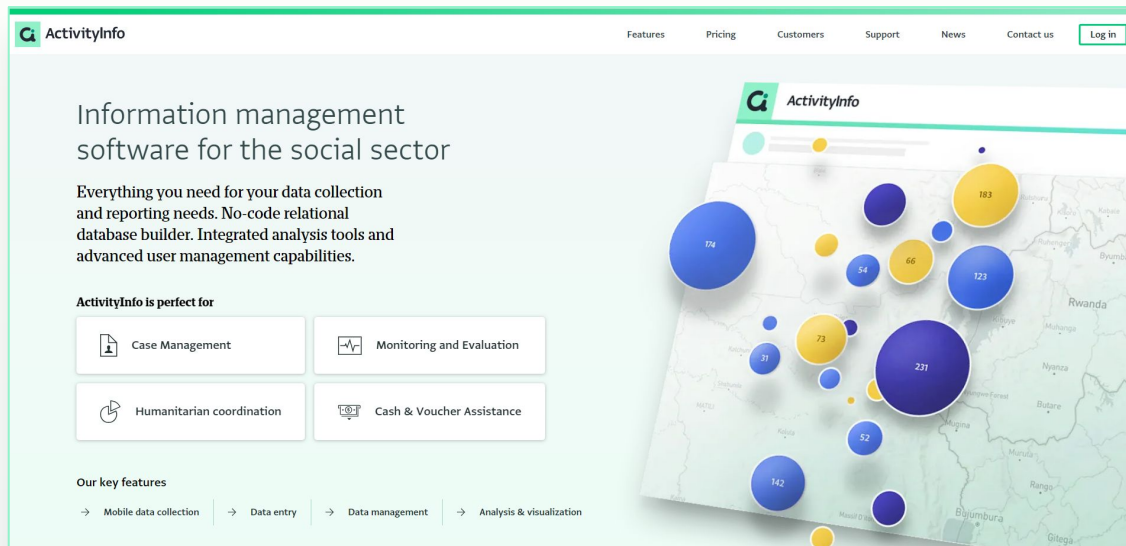
Linking case management system with MEAL

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

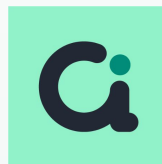


BeDataDriven Mission



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

ActivityInfo

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

Data collection

Easily collect the data you need from anywhere

The screenshot shows a mobile app interface for data collection. It features a form with several input fields, each with a dropdown menu and a 'Select' button. The fields are labeled: 'Division Name' (with 'Barisal' selected), 'District Name' (with 'Barguna' selected), 'Upazila Name' (with 'Amtali' selected), and 'Union Name' (with 'Chhanta Baji' selected). At the bottom, there are 'Previous' and 'Next' buttons. The app is running on a smartphone, and a tablet version of the same form is visible in the background.

Data management

Organize your information according to your workflow

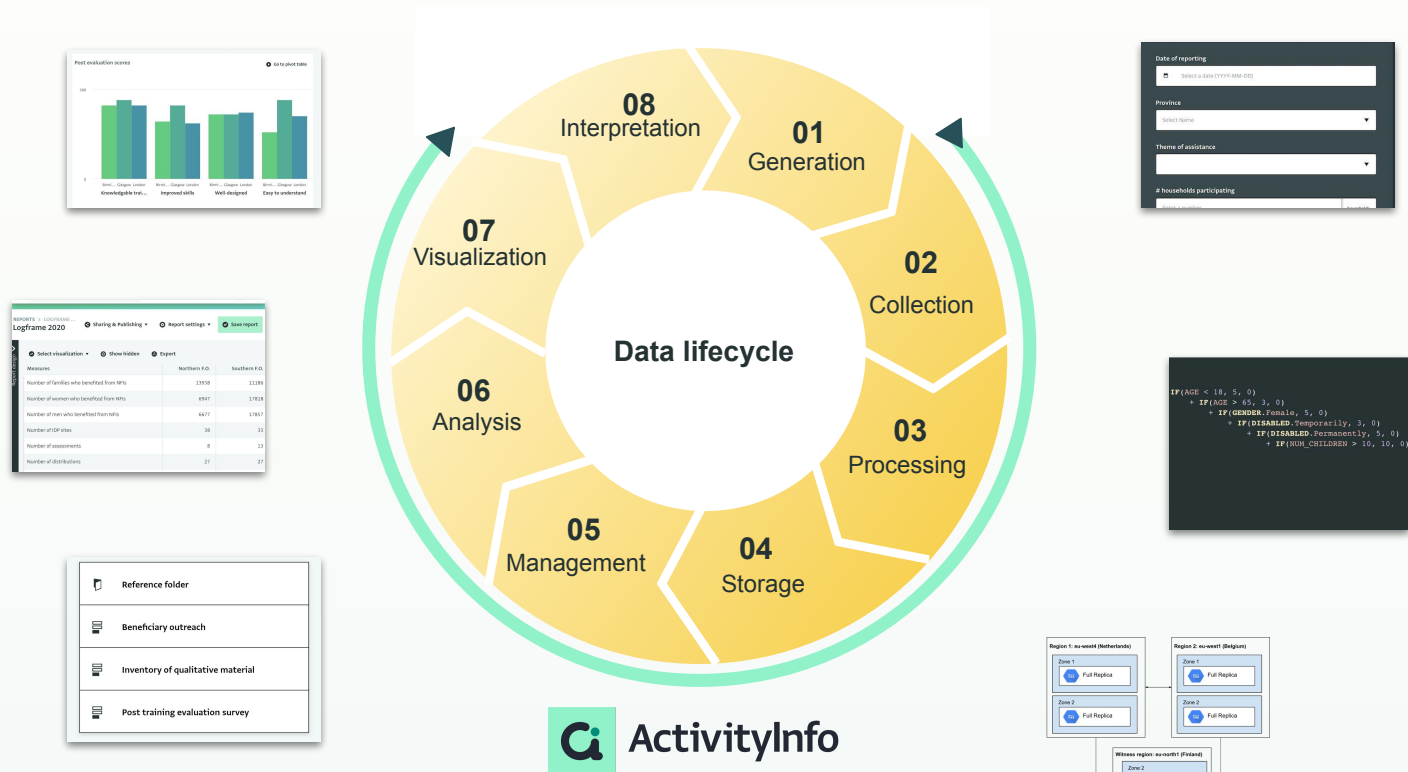
The screenshot shows a web interface for data management. It displays a hierarchical folder structure. On the left, there is a 'REFERENCE' section with a 'Select a form to reference' dropdown. Below this, there is a list of folders and forms. The folders are: 'Czech Republic', 'Côte D'Ivoire', 'Democratic People's Republic of Korea', 'Democratic Republic of Congo', 'Denmark', 'Djibouti', and 'Provisional'. The forms are: 'Aire de Sante (2015)', 'Aire de Santé', 'District', 'Groupement', 'Province', 'Province (2015)', and 'Secteur'. A green box highlights the 'Democratic Republic of Congo' folder and the 'District' form.

Data analysis

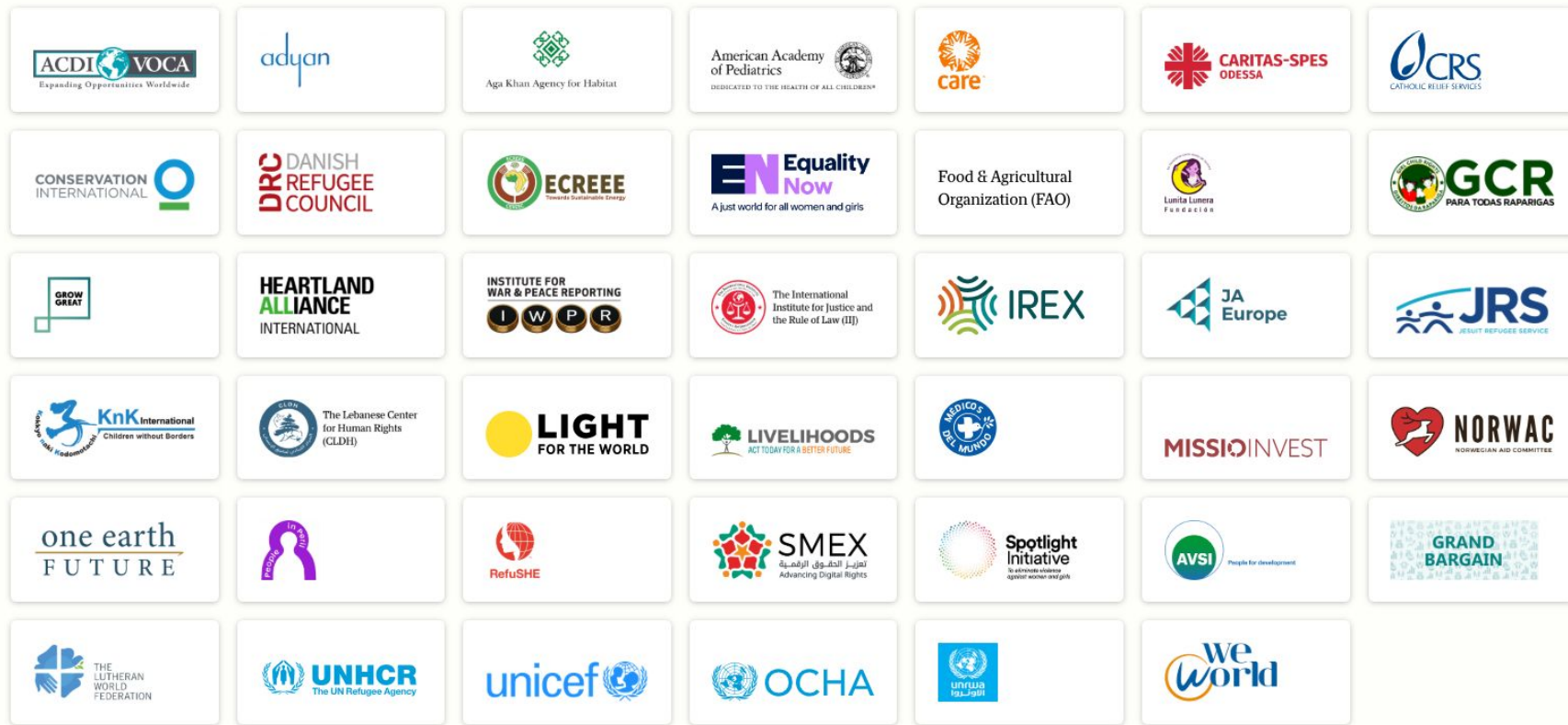
Generate actionable insights in real-time



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



Some of ActivityInfo's users



Meet your instructor

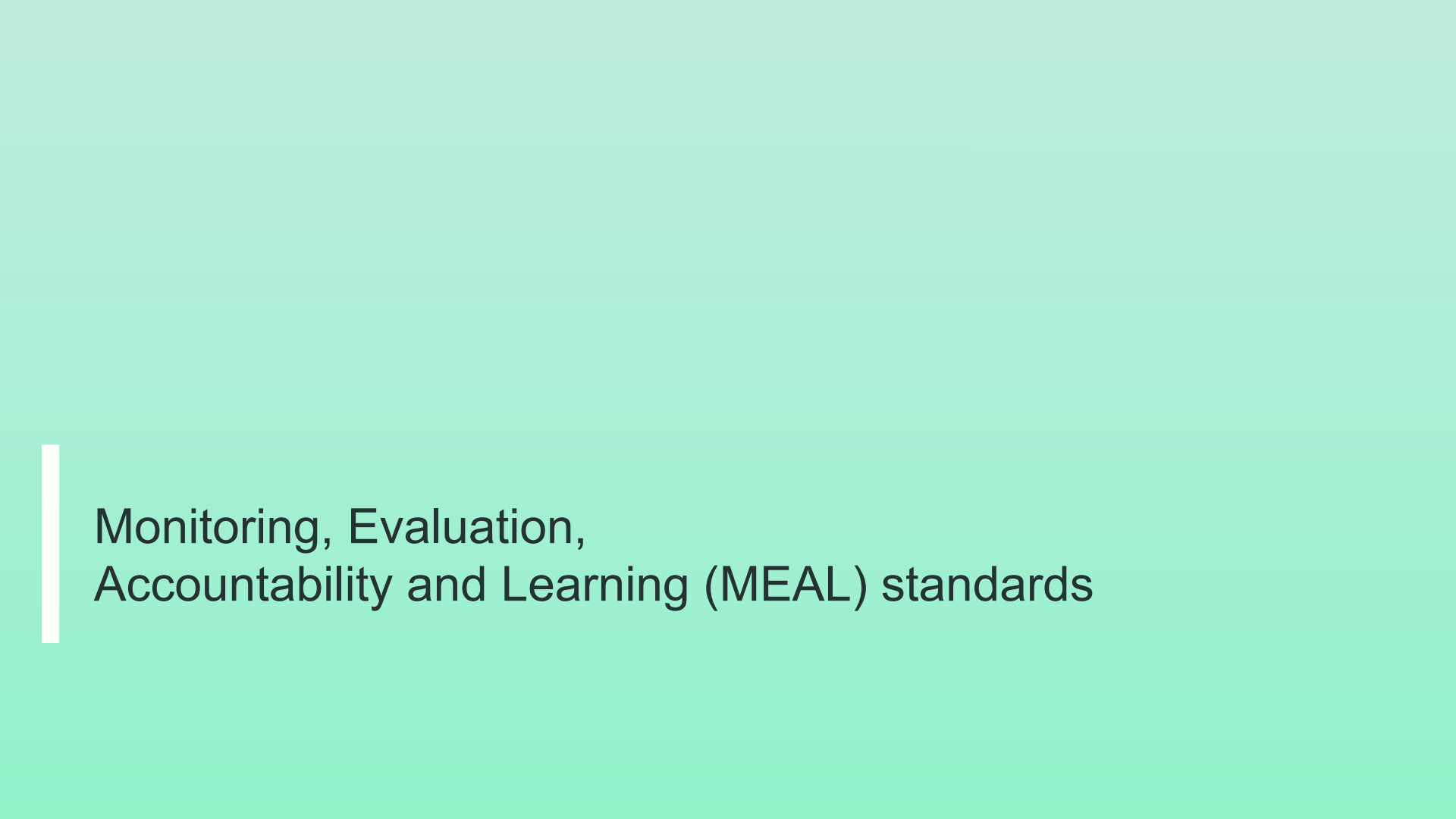


Eliza Avgeropoulou

Senior Monitoring and Evaluation Implementation
Specialist
BeDataDriven

Agenda

- Monitoring, Evaluation, Accountability and Learning standards (MEAL) for case management
- MEAL standards reflected into the case management process
 - Commonly used indicators and analysis
 - Data collection tools used
 - Roles and permissions
- How does an Information Management System balance MEAL needs in case management and address data protection requirements?



Monitoring, Evaluation, Accountability and Learning (MEAL) standards

Monitoring, Evaluation, Accountability and Learning (MEAL)

Monitoring

Systematic data collection and use to provide information on project progress.

Evaluation

User- focused systematic assessment of the design, implementation and results of an ongoing or completed project.

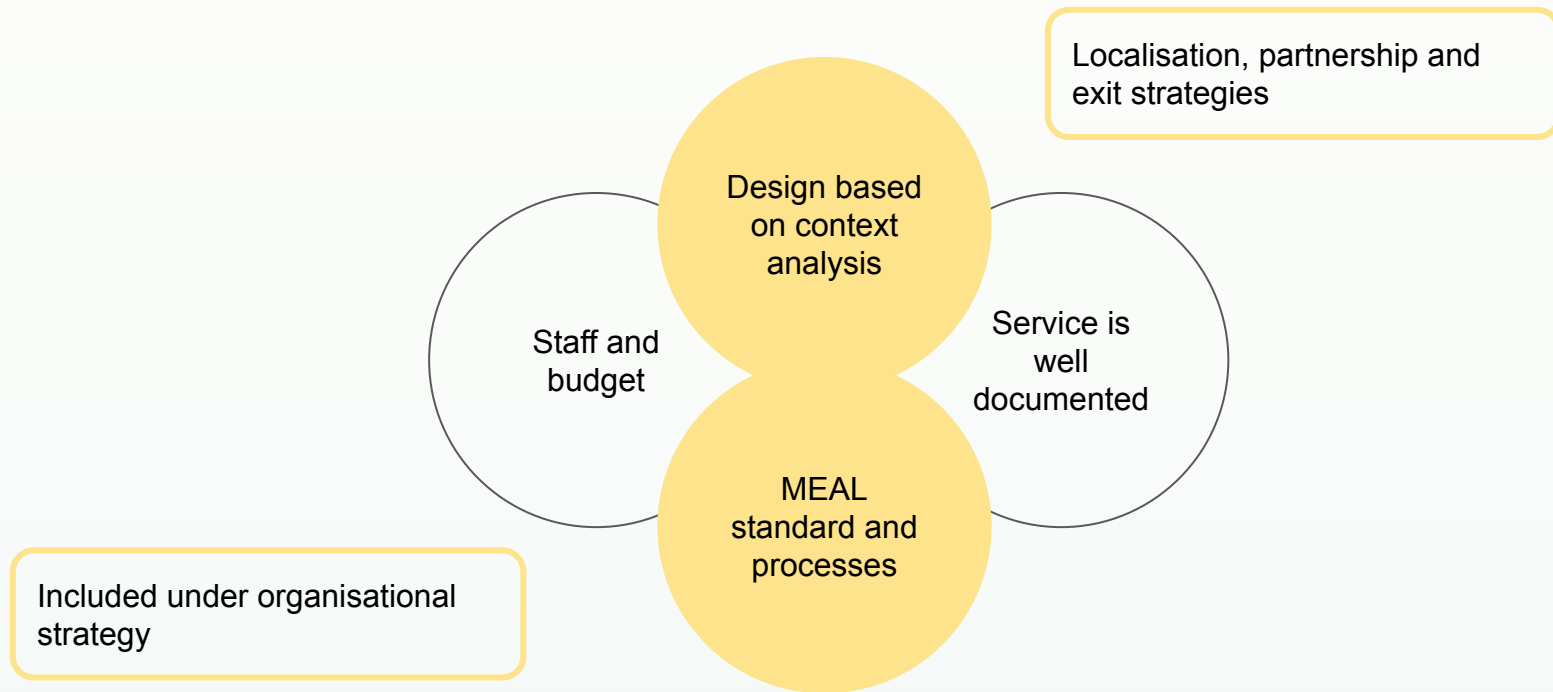
Accountability

A commitment to balance and respond to the needs of all stakeholders.

Learning

Having a culture and processes in place that enable intentional reflection.

MEAL exists in a system



MEAL follows Project process

Project Planning

MEAL Planning

Establish clear goals, objectives, activities, indicators and tools

MEAL framework

Project Implementation

Monitoring

Implement data collection and produce information

Ongoing use of information for decision making

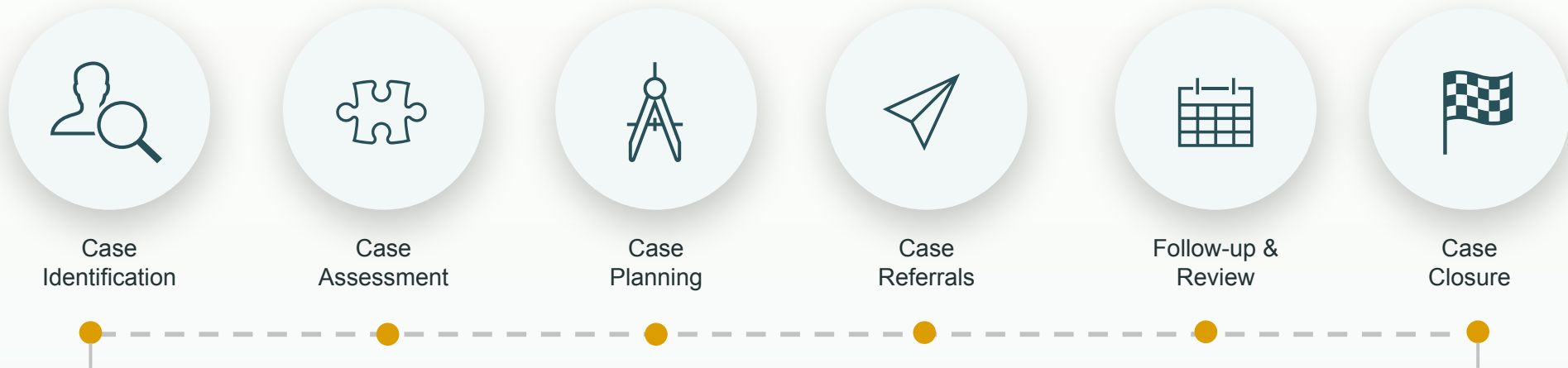
Evaluation

In-depth assessment

Assess impact and sustainability

Learning (Reporting) and Accountability

Case Management Process



MEAL standards and processes are incorporated throughout the Case Management approach

Key standards

Understand Case
Management process, quality
and impact

Implement evidence-based
decision making

Strengthen accountability and
transparency

Responsible data
management and use

Identify and demonstrate effectiveness, relevance, appropriateness, impact and quality of intervention

Generate actionable information for all stakeholders

Build a culture of accountability and transparency among key stakeholders

Record, process and use information in a safe and responsible manner

Case Management Theory of Change

People at risk are able to realize their rights and live in safety and with dignity

People at risk recover from experiences of harm, including discrimination, violence, reduced access to services, and threats to their integrity, safety, and life.

People at risk have access to quality, and client-centered case management services when they need it



MEAL standards in case management process

From standards to processes implementation: key decisions

Project Planning

- What are the case management activities? Which is the sequence?
- What are the data and learning requirements?
- How the data requirements are structured in data collection tools?
- What are the roles and staffing requirements?

Data and tools
Requirements

User Requirements

Learning Requirements

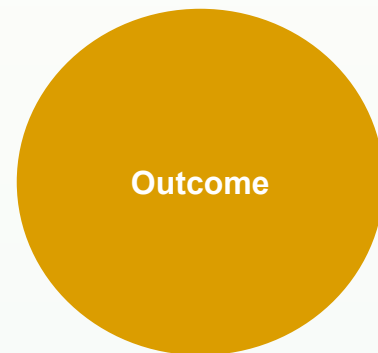
Project Implementation

- How data is transformed to actionable information?
- What is the data collection and management flow?
 - Which role has access where and how?

Process Requirements

Analysis Requirements

Data requirements



From primary data collection to indicator calculation

Case characteristics

Common indicators

Number of cases

Percentage of cases by risk level

Percentage of cases by duration

Percentage of service users that have a disability

Calculations

Count of eligible cases based on internal assessments

Numerator: Number of cases per risk level - **Denominator:**
Number of cases

Numerator: Number of cases per duration - **Denominator:**
Number of cases

Numerator: Number of service users that have a disability -
Denominator: Number of service users

Process and quality

Common indicators

Number of service users

Percentage of intakes eligible for case management

Average number of cases per case worker per month

Percentage of services users satisfied with services

Percentage of successful referrals

Calculations

Number of service users with open and closed cases

Numerator: Number of cases meeting the eligibility criteria -
Denominator: Number of intakes

Numerator: Number of open cases - **Denominator:** Number of caseworkers

Numerator: Number of service who report being satisfied -
Denominator: Number of service users who participated in survey

Numerator: Number of successful referrals - **Denominator:** Number of referrals



Outcome

Common indicators

Percentage of service users who report being less impacted by risks after receiving Case Management support

Percentage of service users who report that they are better equipped to reduce or mitigate the risk after receiving Case Management support

Calculations

Numerator: Number of service users reporting less impact from the risk at case closure compared to the risk assessment stage - **Denominator:** Number of service users who shared how much a risk is impacting their life at both the risk assessment and case closure stage

Numerator: Number of service users who report they are better equipped to reduce or mitigate the risk at case closure than they did at the risk assessment stage - **Denominator:** Number of service users who shared their ability to cope at both the risk assessment and case closure stage

Outcome indicators depend on the case management use case



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BY BEDATADRIVEN

Data and learning requirements

Data Requirements



- What data do we need?
- In what type of data collection sets can we group them?
- How does each data collection set associate with another data collection set?

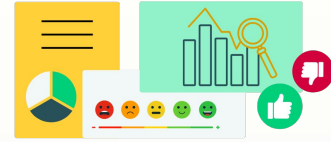
What is the use of each data point?

Learning Requirements



- Who is using information?
- What he/she wants to learn and why?
- What is their role within the system?
- How best they can process information?

From data to learning



Information production

Collect

Data

Organize

Process

Information

Information consumption

Use

Decision

Data collection and analysis

Learning

Choice of appropriate data collection tools
Choice of appropriate information management system tools

Data collection tools



Case
Identification



Case
Assessment



Case
Planning



Case
Referrals



Follow-up &
Review



Case
Closure

Intake form

Contact
information

Baseline
Assessment(s)

Action plan

Referrals

Action plan
follow up

Case file notes

Case closure

Endline(s)

Feedback
survey

Feedback, complaint and response form

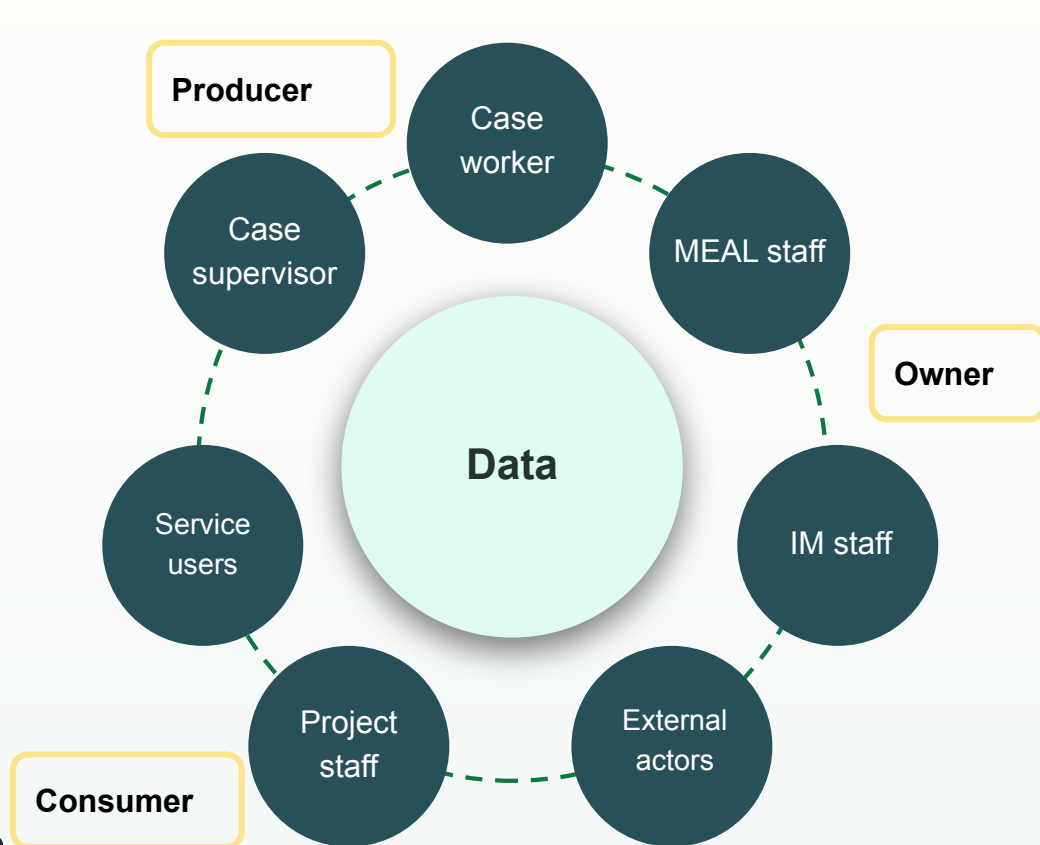
User Requirements

User Requirements



- Who will design the MEAL system?
- Who will design the information management system?
- Who will be managing users and roles?
- Who has access to view, add, edit, and delete data? Which subset of data?
- Who needs view data for analysis?
- Who needs reports access for learning?

Roles



Steward

HQ staff set:

- standards for design
- policies around what data can be stored
- policies around acceptable use of data

Producer

Survey data collectors are under data producers. Their role is being determined by the relationship to the organization

Producers: Users and responsibilities

User

Need

Action

Case worker

Collect data and **manage** service users

Access to data collection tools for assigned service users

Case supervisor

Reviews collected data for assigned case workers - **Facilitates** feedback - **Monitors** case characteristics

Access to data collection tools for assigned case workers and access to reports

Survey data collectors may or may not be system users depending on the relationship to the organization

Consumers: Users and responsibilities

User

Project staff

External actors

Need

Ensures MEAL standards implementation
- **Supports** indicators selection - **Use** data
for learning (coordination- reporting)

Use data for learning (coordination-
reporting)

Action

Access to reports

Access to reports

Owners: Users and responsibilities

User

IM Staff

MEAL staff

Need

Design Information management systems
- **Ensure** data protection - **Analyse** and
use data for learning

Design MEAL framework - **Ensure** MEAL
standards are met - **Analyse** and **use**
data for learning

Action

Access to Information management
system and access to reports

Access to Information management
system and access to reports

Consider access
to client
sensitive data

HQ staff may or may not have access depending on the organizational structure

Process Requirements

Process Requirements



- What is the data collection plan of the program and M&E teams?
- How do our partners plan to collect data?
- How do we plan to perform our analysis?

Process Requirements

Process types	Actions	Considerations
Data collection requirements 	Online or offline Web app, mobile app or collection link	• System roles • Data flows • Data protection considerations
Integration 	Data visualization and analysis	• Existing tools within the organization • Existing capacity within the organization • Data protection considerations

Analysis Requirements

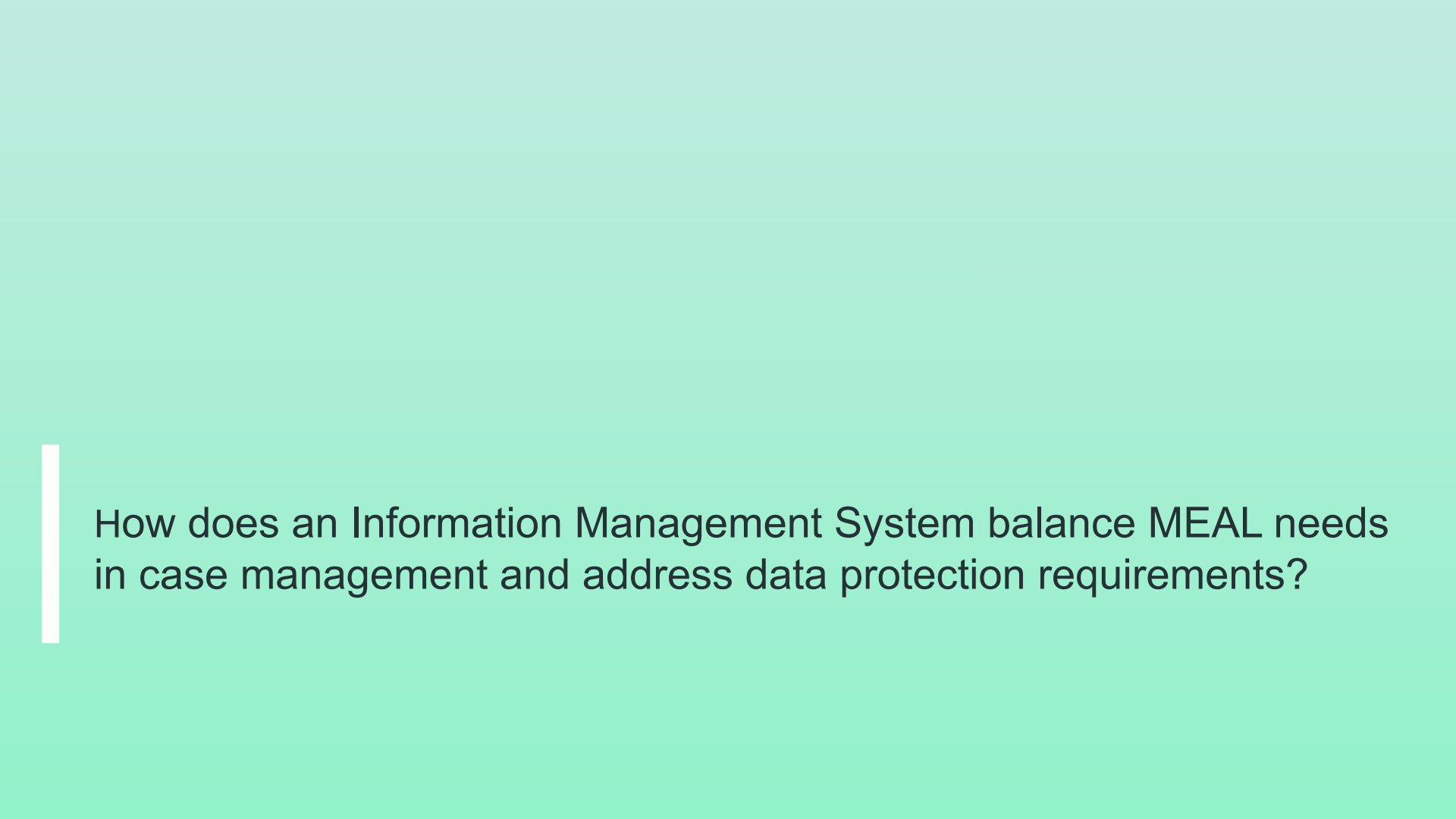
Analysis Requirements



- What data are needed to perform analysis?
- How can existing data be analyzed?
- How will we present the analysis?

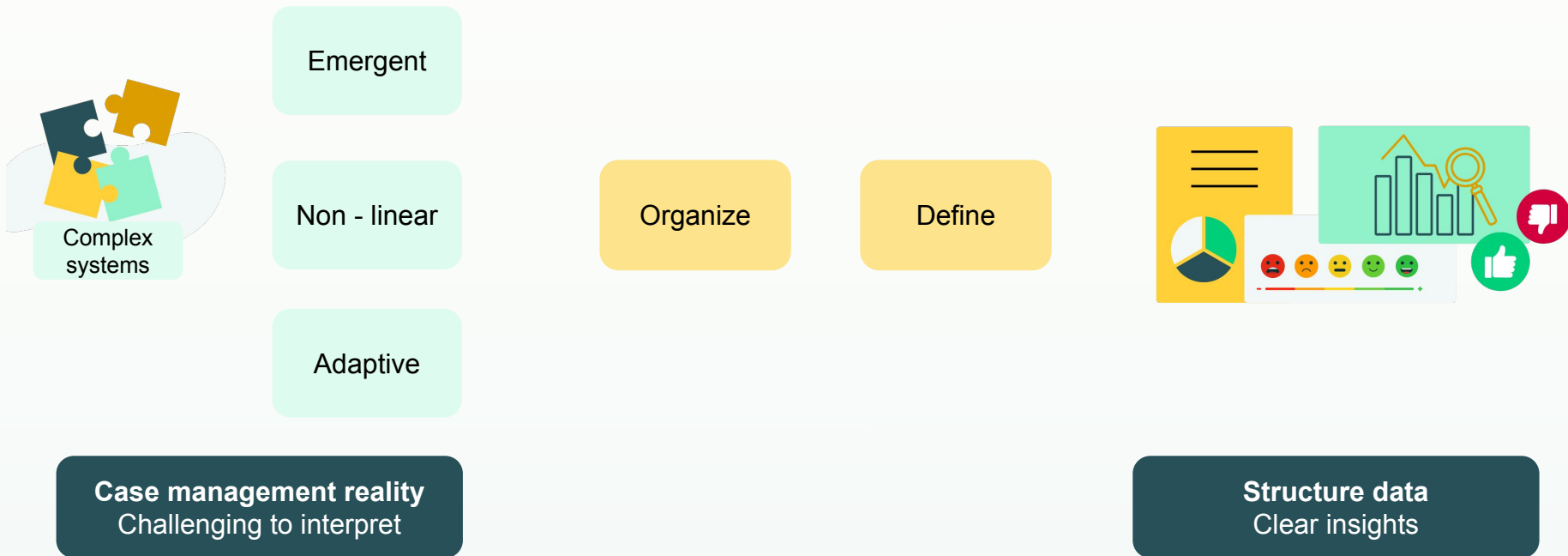
Analysis Requirements





How does an Information Management System balance MEAL needs in case management and address data protection requirements?

From complex reality to clear insights



Information Management System choice

Information production

Collect

Data

Organize

Process

Information

Information consumption

Use

Decision

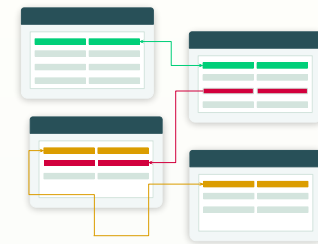
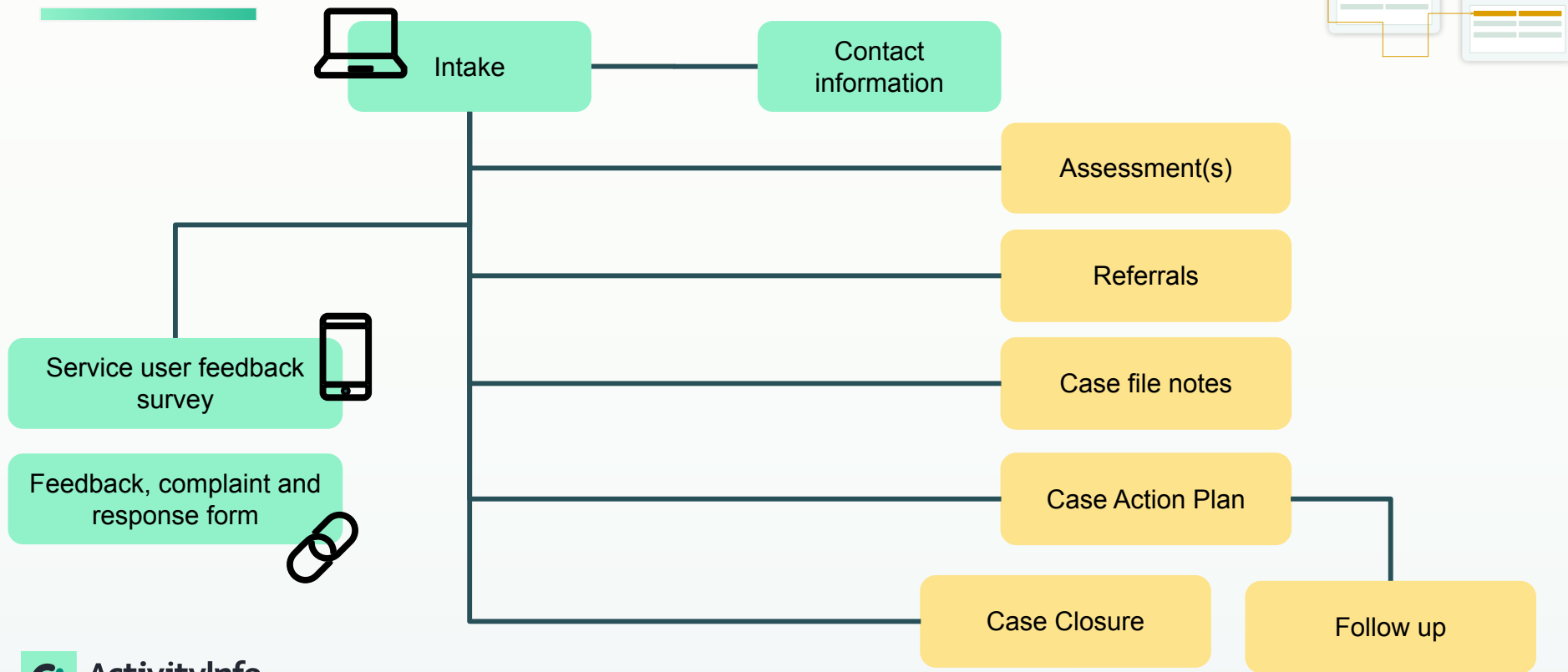
Roles Implementation

Analysis implementation

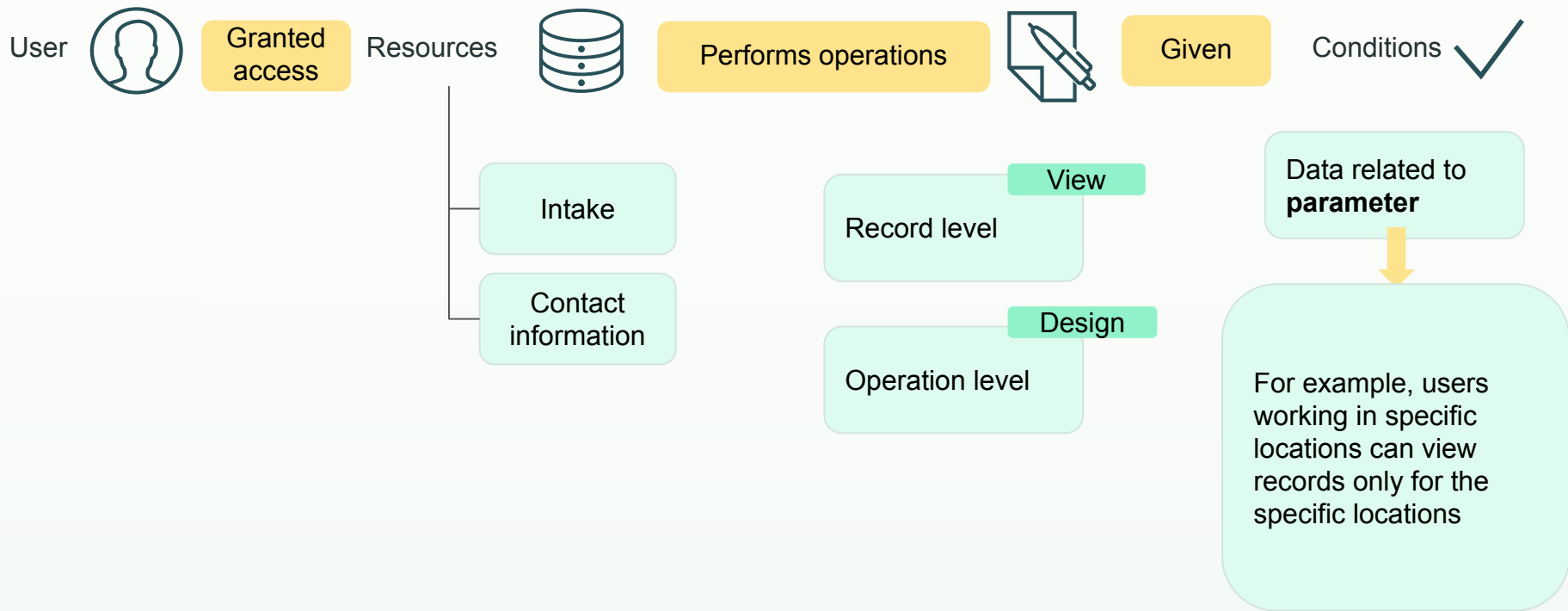
Learning through dissemination

A choice that satisfies needs and is adaptable to changing environments

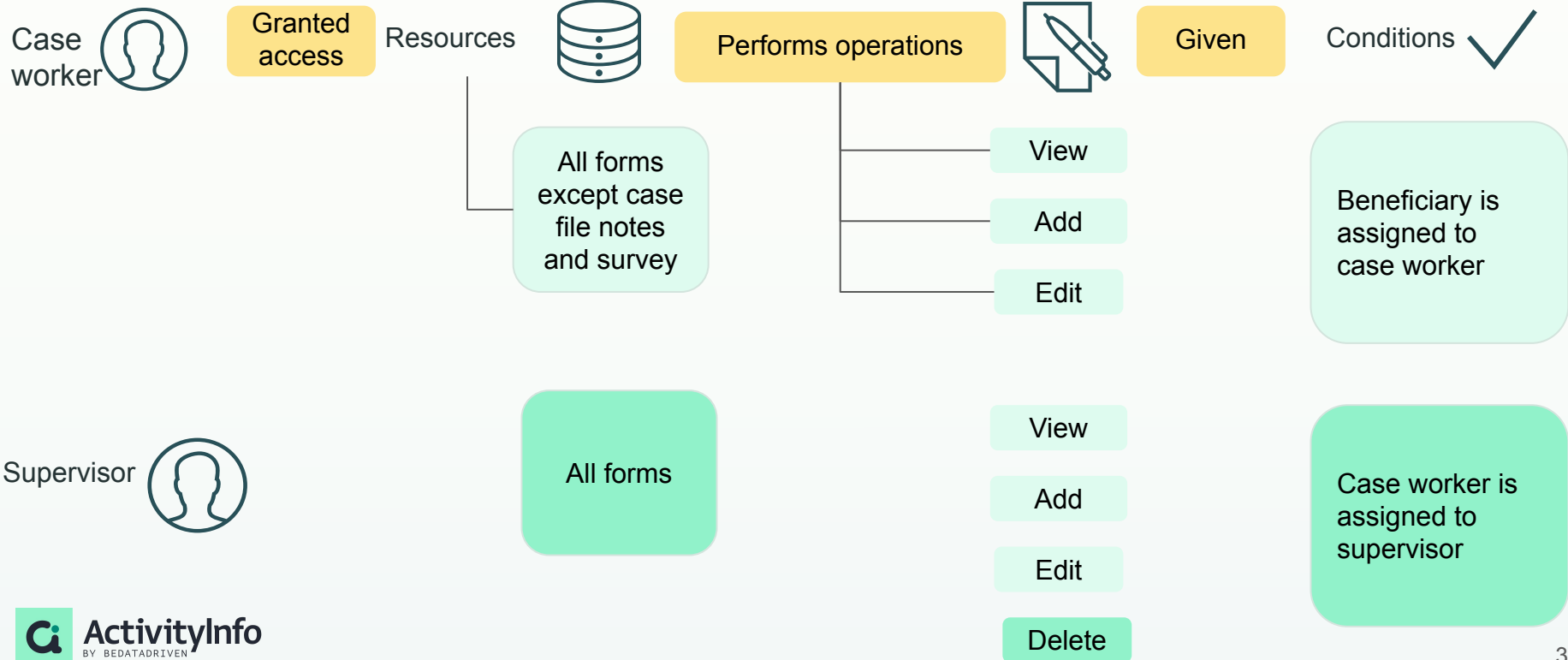
Model data collection tools



Roles and permissions



Case worker and supervisor



Data access across all roles

Case worker

View

Content: They need to see cases in full display. They need long form display of all the values of a case , one after the other.

Supervisor

View

Content: They need customizable summaries of a case and their associated forms that consolidate all relevant information into one clear, interactive view.

Analysis requirements

Report

Monthly

Audience: Project management team

Content: (a) Case characteristics monthly

Dissemination: Create a report - add the programming team with access to the specific report.

Report

Annual report

Audience: Donor

Content: selected indicators from case characteristics and quality/process indicators

Dissemination: Create a report in ActivityInfo and share via a link with donor.

Let's see the example

Let's take a look at the database



Key Takeaways



- Consider the broader environment; MEAL standard and thus MEAL system are interconnected with implementation context, programmatic documentation, resources , organizational policies and procedures.
- MEAL standards implementation start with the MEAL framework design, at the project planning phase. During implementation, the Information Management System tool plays a crucial role. This should match the needs.
- The MEAL standards implementation is associated with:
 - Data requirements (indicators used)
 - Roles requirements
 - Learning (reporting requirements)
 - Analysis requirements
 - Process requirements

Resources



- [Your guide to protection case management](#)
- [Data privacy laws in Monitoring and Evaluation](#)
- [Fundamentals of data modelling in humanitarian and development contexts](#)

Questions?

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