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Planning for a Case Management System rollout

Moving from requirements to learning

Starting shortly, please wait!

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.

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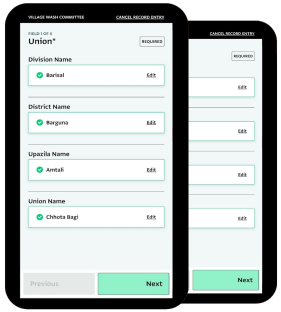
An end-to-end solution for M&E data management

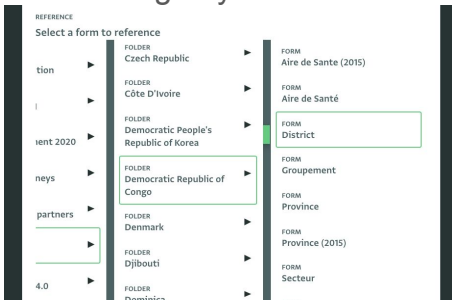
Data collection

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

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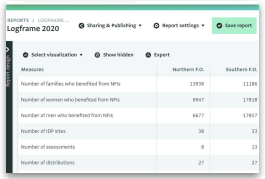
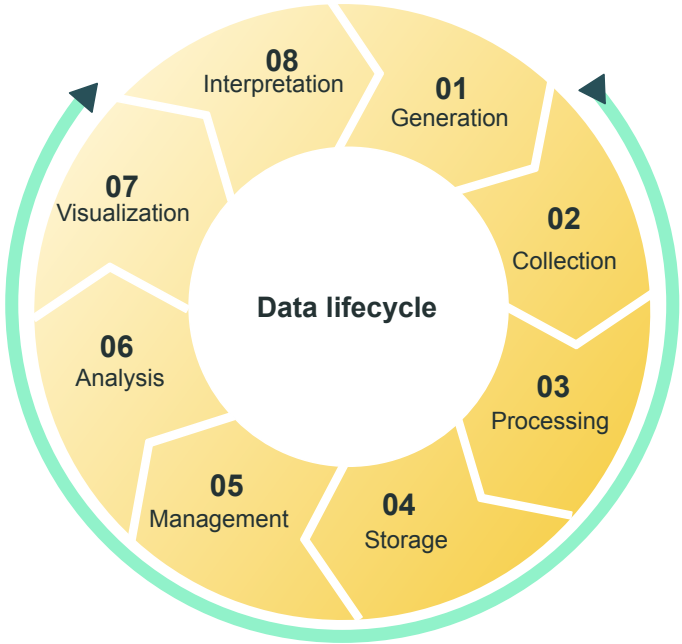
....built on a relational data model

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





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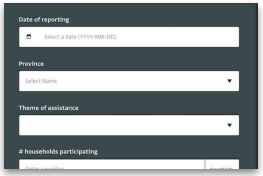

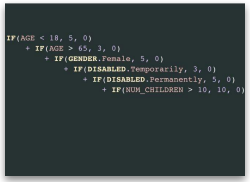

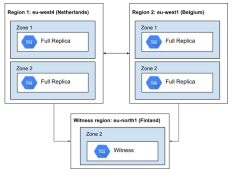

Diagram adapted from Harvard Business Review

ActivityInfo Users

Aga Khan Agency for Habitat

Meet your instructor

Eliza Avgeropoulou

Senior Monitoring and Evaluation Implementation Specialist

BeDataDriven

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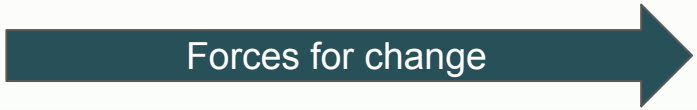
Agenda

- **Introducing a case management system:**
  - How does change happen? Forces of change and resistance to change
- **Design and roll out a case management system**:
  - What are the steps for designing and rolling out a case management system?
  - Data model as a key to structure data: How to design a data model?
  - Best practices on planning for data use
- **Best practices for sustaining system use**

Introducing a case management system

A framework of how change happens



- Common system
- Save time
- Implement standards
- Use data timely
- Use data across all levels
- Use data of higher quality
- Increase accountability

Proposed Change

Case management system

- Past negative experiences
- Lack of resources
- Loss of trust and control
- Fear of unknown
- Poor communication
- Time and pace of change
- Lack of involvement

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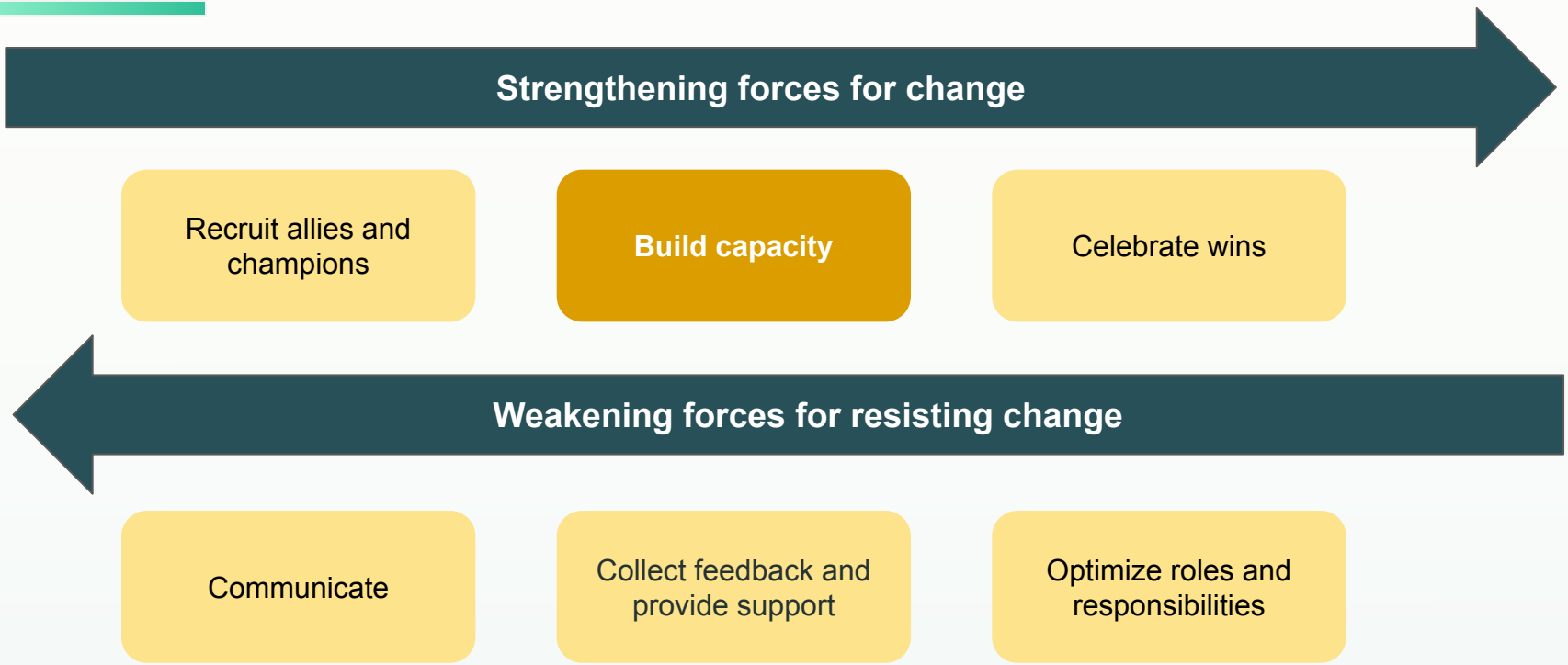
How can we introduce a change?



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The key is capacity building

Case management system design

Case management system launch and adoption

Standard operating procedures

MEAL System design

Information Management System design

Training to end users

Manuals

Training to admins

Resources

Incentive for use

REAL TIME

DATA USE

TO

SUPPORT BENEFICIARIES

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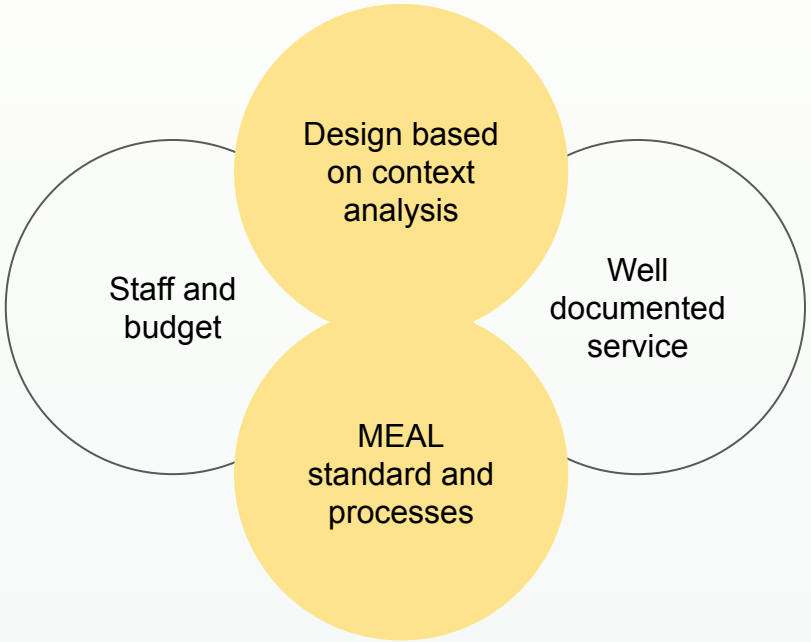
Design and roll out a case management system

Reminder! Our system



Organizational strategy

Information Management System

REAL TIME

DATA USE

TO

SUPPORT BENEFICIARIES

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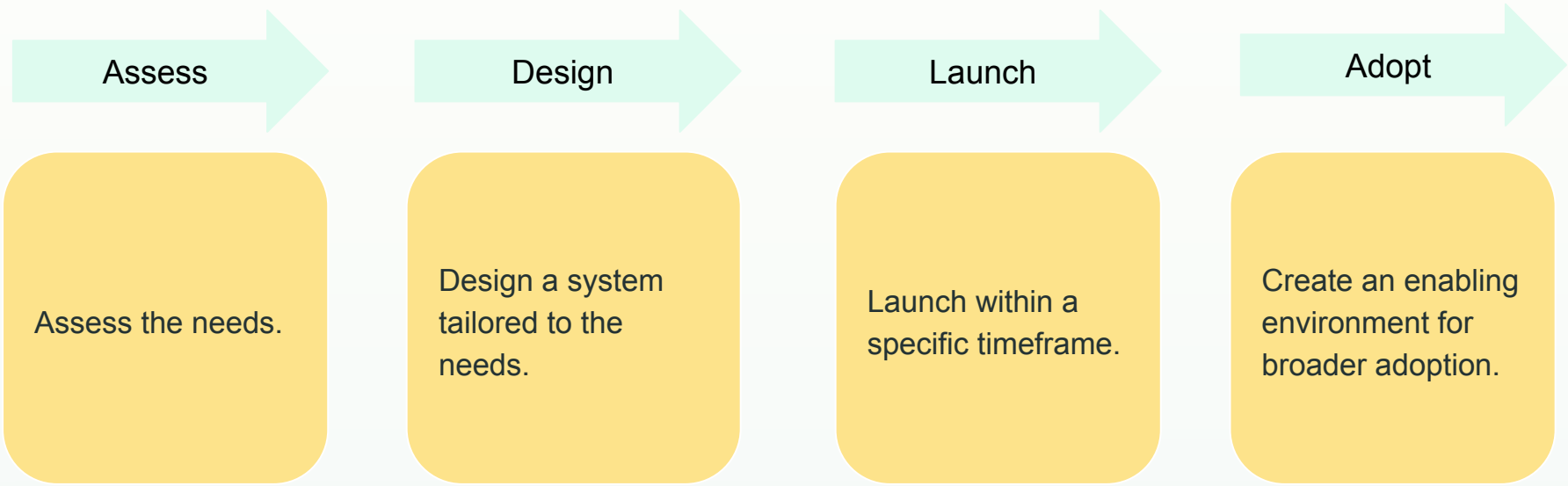
Establish a clear objective

If we adopt an Information Management System at **[project name and/or region/organization]** level and **[critical hypothesis]**, then we will **[main objective].**

[project/programme name and/or region/organization]	Specify the level of implementation.
[critical hypothesis]	Specify whether there are specific risks to be mitigated in order to achieve the main objective.
[main objective]	The short-term objective for the use of an Information Management System

Step-by-step approach



Assess

Inputs

Why

- Identify the implementation level
- Identify critical hypotheses
- Describe the short-term objective for Information management system use

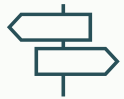
How

What

- Identify data requirements and data collection methods
- Identify process requirements
- Identify users - roles and responsibilities
- Identify learning (reporting) requirements

Outputs

Theory of change



System requirements

Data flows

Data model

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Design

Inputs	Outputs
• Data model is translated into data collections forms. • Data flow is translated into roles and permissions.	**Database** 
• Learning requirements are translated into reports.	**Reports** 
• Identify capacity building approach for administrators.	**Training and manual for admins** 

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Launch

Inputs

- Identify capacity building approaches for end users in order to administer data collection forms and reports.

Outputs

Training sessions and manual for end users

Resource library

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Adopt

Inputs

- Monitor system use.
- Create communication channels for receiving and responding to feedback.
- Improve policies, processes and procedures in place

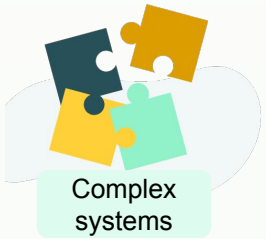
Outputs

System maintenance

Continuous training

Data model

From complex reality to clear insights



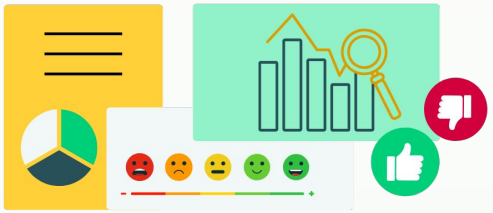
Emergent

Non - linear

Adaptive

Organize

Define



Case management reality
Challenging to interpret

Structure data
Clear insights

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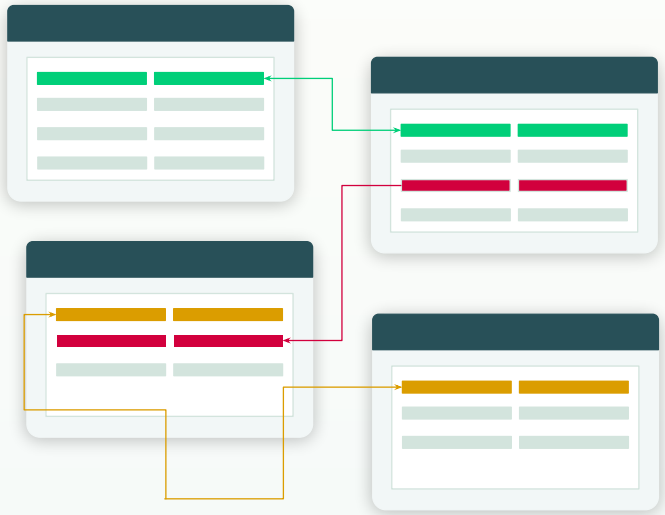
What is a data model?

A **visual representation** of a conceptual framework that organizes and defines data elements and shows how they interact with each other.

By mapping out data structures and their relationships in a visual format, we understand how data is:

- Stored
- Organized
- Retrieved



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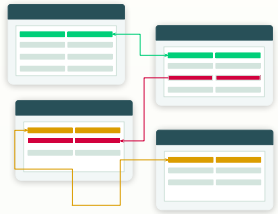
The case management relational data model



Intake

Contact information

Assessment(s)

Referrals

Case file notes

Case Action Plan

Follow up

Case Closure

Service user feedback survey

Feedback, complaint and response form

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Relational data model

Requirements

House blueprint: Meeting with homeowners to understand the number of rooms, style, layout preferences, and functional requirements.

Data model: Meeting with stakeholders to understand system requirements and the end goals of the information management system.

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Relational Data model

Identify entities

House blueprint: Rooms like the kitchen, bedroom, bathroom, and living room.

Data model: Entities such as beneficiary or referral.

Relational Data model

Attributes

House blueprint: Room dimensions, window locations, door placements, and types of flooring.

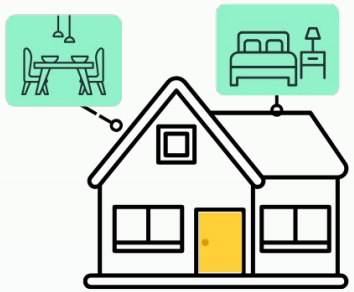
Data model: Attributes like beneficiary ID, name, age, gender - The characteristic that describes your entity in some way.

House blueprint: Choice of the exact materials to guarantee higher quality

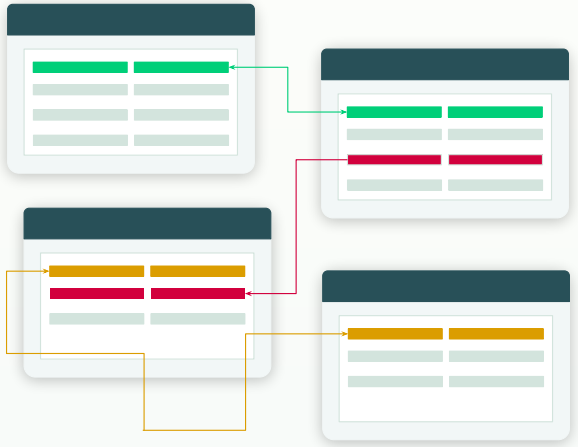
Data model: Specific settings that guarantee quality. For instance - the age should be above 18 years old .

Relational data model

Relationships



House blueprint: Hallways connecting the living room to the kitchen, stairs connecting floors.



Data model: Relationships - beneficiaries receive multiple services, for instance one beneficiary receives multiple times referrals .

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Key definitions

Data entity
Main theme, object, unit or operation for which we collect data.

Data set
Is a collection of related data (attributes) to the entity that is organized in a structured format.

Attribute
Any characteristic that is used to describe an entity.

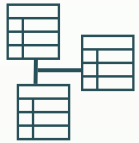
System Requirements and Data Model

System requirements

Data | User

- Data entities
- Data sets identification
- Data collection objective for each data set
- Data flows: Who does what via which data set?

Data model



- Data entities
- Data sets
- Attributes
- Relationships

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Benefits of the Relational Data Model

Supports the division of a large table into smaller tables.

Reduces redundancy

Ensures uniqueness

Defines relationships across the tables.

Ensures data integrity and validity

Normalization

Let’s reflect….

Registration				
Beneficiary ID	**First and last name**	**Social Worker ID**	**Session ID**	**Referral date**
0001	George Morales	0003	0006	28/07/2025
0001	George Morales	0003	0007	28/08/2025

What issues can we identify?

- Fields do not contain granular values.
- The table includes data that serve different objectives; values do not depend on a single unique identifier.
- A non-key attribute depends on another non-key attribute, rather than directly on the primary key.

How can we solve these issues?

Beneficiary Intake		
Beneficiary ID	**First name**	**Last name**
0001	George	Morales

Assignment	
Beneficiary ID	**Social Worker ID**
0001	0003

Referrals Registration		
Beneficiary ID	**Session ID**	**Referrals date**
0001	0003	28/07/2025

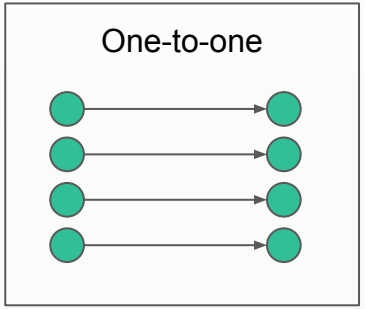
How can we solve these issues?

Beneficiary Intake		
Beneficiary ID	**First name**	**Last name**
0001	George	Morales

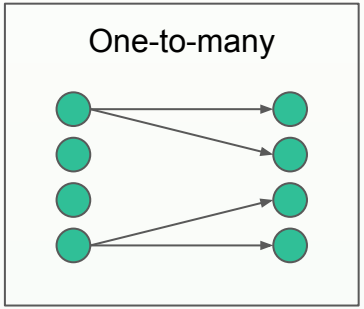
Assignment	
Beneficiary ID	**Social Worker ID**
0001	0003

Referrals		
Beneficiary ID	**Session ID**	**date**
0001	0003	28/07/2025

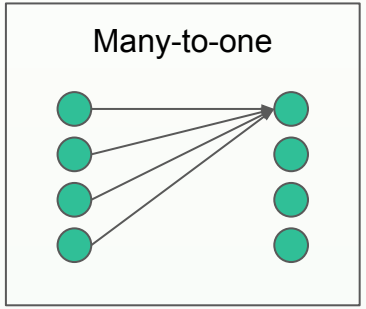
Relationships



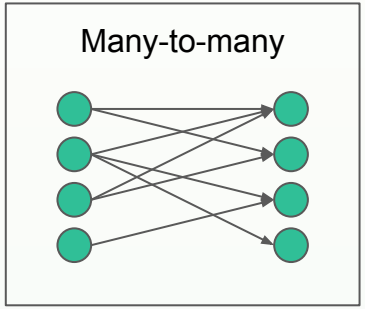
One vulnerability assessment per registered beneficiary.



Multiple services received by one registered beneficiary.

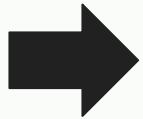


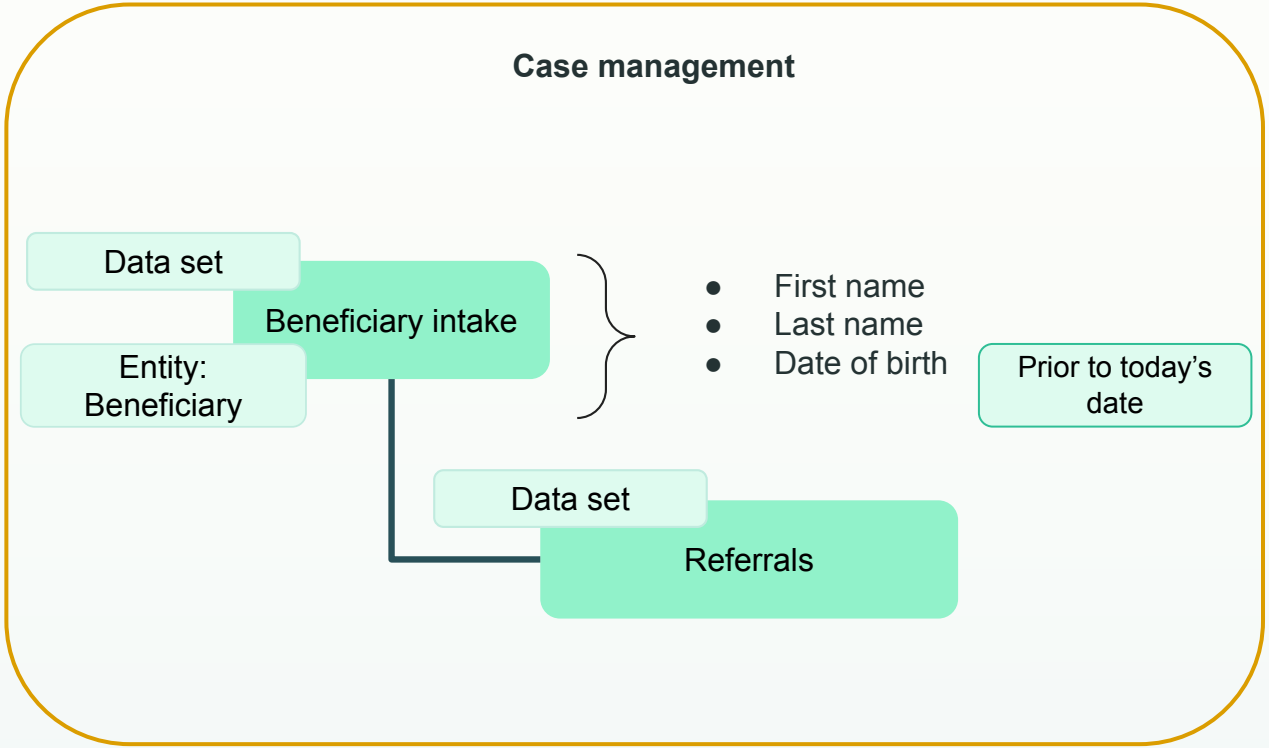
Multiple beneficiaries reside in one location. Each beneficiary resides only in one location.



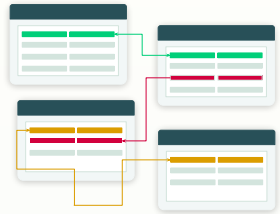
Multiple beneficiaries enroll in multiple trainings.

The house analogy





Relationships



Intake

1:1

Contact information

1:1

Assessment(s)

1:1

1:M

Referrals

1:M

Case file notes

1:1

Case Action Plan

1:M

Follow up

1:1

Case Closure

Service user feedback survey

Feedback, complaint and response form

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Planning for data use

When does planning start?

Data model

- Data entities
- Data sets
- Attributes
- Relationships

Report

The Data Model enable us to:

- Identify the data needed for the reports
- Use the data to reach the analysis that we need

Iterative process from System Requirements to Data Model

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Define Learnings

Analysis	Audience	Communication	Dissemination
Type of measures needed.	Who will use the report?	How do we communicate results?	How do we disseminate results?

Analysis: Types of measures

Measures of frequency	How often an event, behavior, or condition occurs in a given population.
Measures of central tendency	Describe the “center” or “average” of a dataset.
Measures of position	Indicate the relative standing or location of a data value within a dataset.
Measures of variability	How spread out the data values are around the center.

Analysis

Measures of frequency

How often an event, behavior, or condition occurs in a given population. Summarize data.

- **Count**: raw numbers
- **Proportion**: part of the whole
- **Ratio**: comparing two groups
- **Rate**: frequency over time

Measures of central tendency

Describe the “center” or “average” of a dataset.

- **Mean**: average value
- **Median**: middle value

Analysis

Measures of position

Indicate the relative standing or location of a data value within a dataset.

- **Min**: minimum value
- **Max**: maximum value

Measure of variability

How spread out the data values are around the center.

- **Range**: total spread
- **Variance**: Average squared deviation from the mean

Audience

Field staff

- Keep it simple
- Real world analogies
- Use colors and labels

Project staff

- Increase interactivity
- Use dashboards
- Include information based on needs

External audience

Internal Management

- Interactivity
- Results interpretation

Include information based on needs

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Communicate

Comparison	Distribution	Composition	Relationship
			
Over time Amongst items	Single variable Two variables	Static Changing over time	Two variables Three variables

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Communicate

Indicator tracking

Measure	2024-01	2024-02
Number of cases		

Appropriate to replicate the Indicator Tracking Table over time.

Dissemination

Internally
Case workers/Case supervisors/Project Manager

Share it across roles within the database.

Externally
HQ, donors, implementing partners

Share it via a publicly accessible link.

Encourage real time use of information

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Example

Report

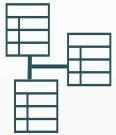
Monthly

Audience: Project management team
Content: (a) Case characteristics monthly
Dissemination: Create a report - add the programming team with access to the specific report.

Let’s take a look at the report

Example: analysis

Data model



Analysis

Data sources

- Beneficiary Intake
- Closure form

Fields

- Gender
- Location
- Risk level
- Date open/close
- Disability

Measure of frequency

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Example: audience and communication

Indicator tracking

Distribution

Composition

Measure	2024-01	2024-02
Number of cases		

Report is based on the MEAL plan

Project Managers can use the report in real time

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Best practices for sustaining system use

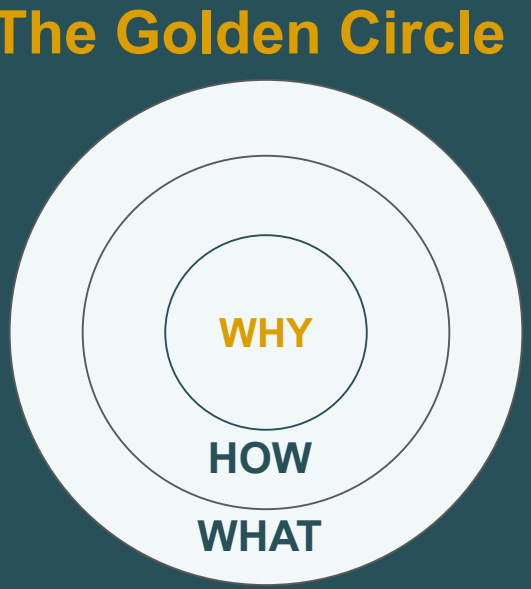
Capacity building

Approach to capacity building

WHY:
The purpose and reasons for taking specific actions tied to organizational beliefs, values and goals

HOW:
Strategies, best practices allowing users to think critically and make the best decisions in real time.

WHAT:
Processes and SOPs a learner must follow to use the product.



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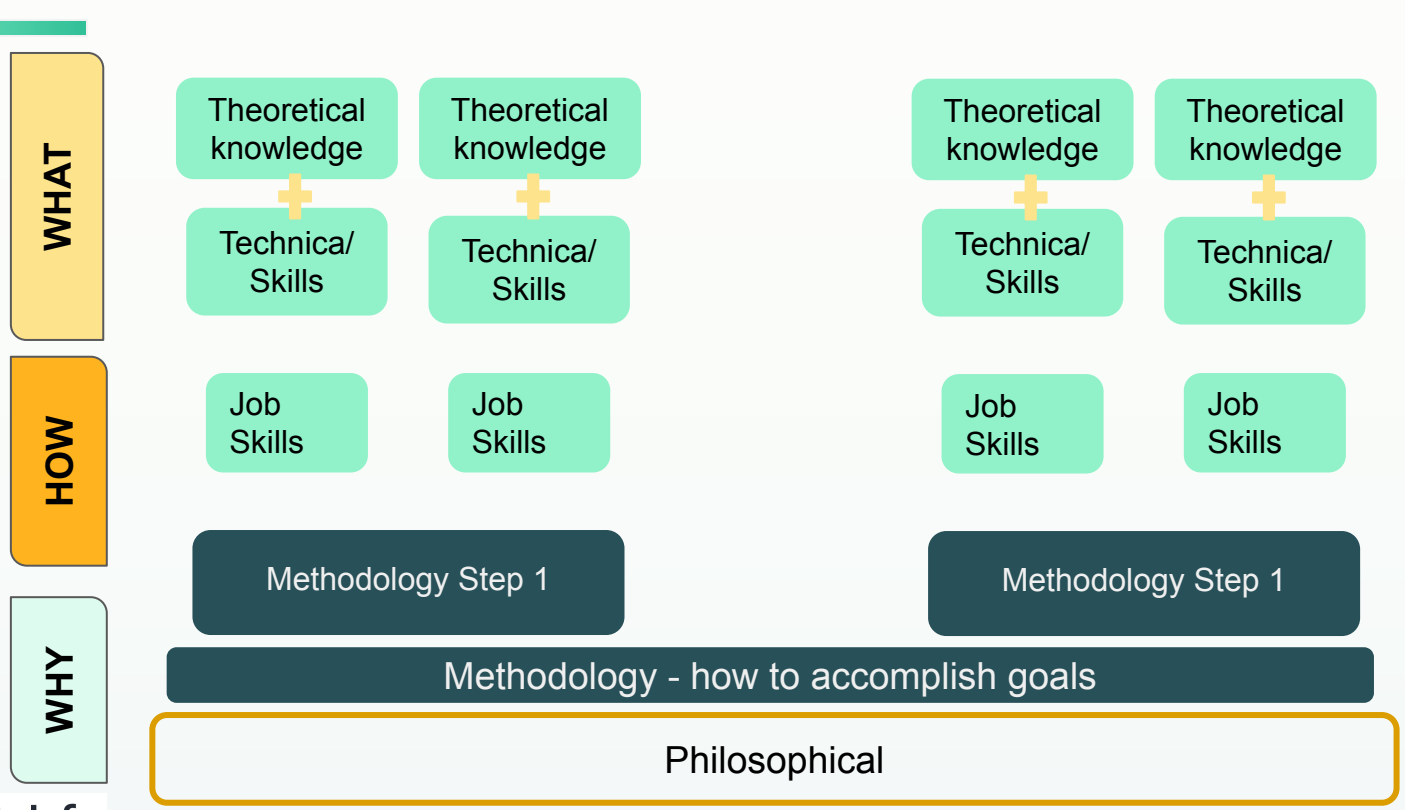
Application



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Example

WHAT

HOW

WHY

Relational data model + Transform data model to System

Data privacy procedures + Creating and manage roles

Design a Database

Information management system design

Improve the implementation of current and future programming in order to reach beneficiaries at scale, while maintaining high standard of quality and ethics.

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Training design

Design the training

Prior to training

- **Who** needs to do **what** differently?**Why**?

During training

- Tailor the training content to align with the learning needs assessment:
  - Design a training outline or draft schedule that identifies objectives for each session.
  - Design a detailed facilitation guide that fleshes out the methods and supporting documents for each session.

Following training

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

Prior to training: Who?

Owners

Administrators

System Requirements

Information Management system design

Ability to deliver trainings

Form design

Roles

Reports

Profile: Usually audience with advanced skills

Producers

End Users

Consumers

Data collection

Data access

Data use

Profile: Varies depending on position

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Facilitation tips!

A good facilitator

- Ask open questions.
- Encourages participation.
- Summarizes discussions and acknowledges different viewpoints
- Uses body language.
- Uses a variety of facilitation techniques

Following the training: Evaluation

Context-specific questions should aim to measure effectiveness, satisfaction, relevance, applicability and learning outcomes.

Measure training effectiveness

Assess participant satisfaction

Evaluate trainer performance

Identify areas for improvement

Measure learning outcomes

Additional resources

What out library should include?

Organizational level

Processes on:

- Case management
- MEAL
- Information Management (incl. Data protection)

- Available tools on Information Management System
- Relevant guidance and focal points
- Available templates, examples for other case management projects and focal points

Project level

Standard operating procedures on:

- Case management
- Feedback, complaint and response mechanism
- Data protection

- Information management system manuals
- Instructional videos on specific topics

Key Takeaways

- Capacity building ensures that procedures can be implemented consistently across all users. The WHY-HOW-WHAT framework can help you design appropriate educational material

- We have four main steps
    - The assessment of the needs at various levels.
    - The design which is tailored to the needs. The design includes database and reports design
    - The launch within a specific timeframe. Capacity building is core to this step.
    - The adoption. How can we create an enabling environment for broader adoption.

- The relational data model is the key to simplification of a complex reality
- Learning (reporting) has four components: Analysis, audience, communication and dissemination
- Learning (reporting) starts at the data model design

Questions?

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