## **Building Data Management Capacity** To Support Monitoring & Evaluation

MNN Annual Conference 2017 Framingham, MA







## Facilitators

- Meryn Robinson, Project Manager, Dimagi
- Elizabeth Geoffroy, M&E Manager, GAIA
- Alan Guedes, Senior Consultant, Vera Solutions

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## Agenda

- Tech for M&E: Stories from Practitioners & Tech Providers
- Breakout Session: What's the right tool for you?

Discussion/Q&A

## How We Built This... Stories from Practitioners & Providers

## Who We Are: GAIA

#### Mission:

Together with the communities that we serve, GAIA develops innovative, tested and replicable healthcare programs in resource-deprived regions in Africa, especially those most affected by HIV/AIDS, TB, and malaria. To ensure the broadest possible impact, we rigorously test our initiatives and promote the replication of successful models.

Annual Budget: \$3.5 Million

*Staffing:* 8 FTE in the US, 65 FTE in Malawi



## Data Management Systems



#### REAL WORLD

In the <u>real world</u>, project activities are implemented in the field. These activities are designed to produce results that are quantifiable.

#### DATA MANAGEMENT SYSTEM

A <u>data management system</u> represents these activities by collecting the results that were produced and recording them.

Data Quality: How well does the data management system represent the real world



#### Data Quality

Validity Reliability Integrity Precision Timeliness Completeness



## **Common M&E Challenges**



- Multiple people accessing data simultaneously
- Data volume/complexity has outgrown current tools
- Moving from pen and paper to electronic data collection
- Need for automation
- Need for offline access
- Need for real-time data/feedback



## Choosing & Implementing a Data Management Tool

#### Costs

- Tool/product
- Data prep and transition costs
- Ongoing running costs for a technology tool

#### Training staff on the new tool

- Who will use the tool? Consider data collectors through management staff
- What training is needed for each staff member?
- Will staff need different access permissions?





#### Magpi

## Mobile data collection, management and analysis/visualization SMS messaging and reminders

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#### Salesforce

- Relational database
- Specializes in data management

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Ellen Kazembe

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Individual Detail

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Unique ID Number INDV-0262

Individual Full Name Ellen Kazembe

First Name Ellen

Alternate Name

Age at Selection

Trained in HTC?

Trained in ART?

Photo Consent Form Signed 💿 🗸

▼ Status Information (Automatic)

▼ Most Recent Academic Information (Automatic)

Sumame Kazembe

Sex E

Date of Birth 0 10/21/1990

Type O Scholar

Photo URL O https://c.na30.content.force.com/serviet/servie.

Current Site Program () Kamuzu College of Nursing - Lilongwe Bachelors in Nursing and Midwifer

Selection Criteria O Double Orphan

Nurse 🗸

Current Status O Graduated

First Enrollment Date 1/1/2010

Current Level O Completed Bond

 Can use APIs to link to other software for collection/analysis

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Home Country O Malawi

Primary Phone Number - +26588442849

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Upgraded Degree

Counted for USAID

Comments/Notes

Educator Type

Current Enrollment Start Date O 1/1/2010

Actual Graduation Date () 12/1/2013

Story Consent Type O Full Use

Level Detail O In-Service

Ministry of Health Funding

Story Consent Form Signed 💮 🖌

Bond completion letter sent?

Email ekazembe90@omail.com

Secondary Phone Number

Date Received Nursing Supplies

US Phone Number

Enrollments Exam Updates Deployments Follow Ups Funding Payments Data Entry Interface Reports Dashboards Video Demos

Funding 11 | Enrollments 11 | Academic Updates 14 | Exem Updates 11 | Deployments 12 | Deployments 12 | Performents 13 | Follow Ups 11 | SMS Messages 12 | Notes & Attachments 13

Edit Delete

GAIA Scholar Connect

Customize Page | Edit Layout | Printable View | Help for this Page 🍕

Elizabeth Geoffroy \* Setup Help & Training

## Telerivet

STATA

analysis

Data

Data collection through SMS





#### Google docs

- Data management
- Sheets, forms, slides, docs (basically everything in the Microsoft suite online)
- Able to view edits docs simultaneously, see changes in real time

#### Excel

- Excellent analysis and reporting capabilities
- User friendly
- Commonly used







## Making the Switch



- Think critically about your **end goal**
- Plan for collection, management and analysis
  - Some tools specialize in one, some integrate all three functions
- Ensure data being transferred is of high quality
- Use free trial versions of tools before investing
- Look for nonprofit pricing
- **Fundraise** specifically for enhanced data management capacity

## Harnessing the Power of Your Data

GAIA GAIA GAIA GAIA GAIA GAIA Global AlDS Interfaith Alliance.

- How will you use your data?
  - Monitor, assess, and improve program performance
  - Drive future program planning
- Operations research harness the power of routine, process monitoring data
  - Routine data can be published
  - Processing/monitoring data and program results are valuable for practitioners, implementers (and impress funders)



# dimagi

- Socially conscious software company created in 2002 out of Harvard and MIT
- Experience implementing hundreds of projects in 60+ countries
- Team of 120+ engineers, scientists, agriculture and public health experts, and project implementation staff
  - Offices in the United States (HQ), Senegal, India, Guatemala & South Africa
- Makers of CommCare (<u>www.commcarehq.org</u>), a leading opensource mobile platform for the last mile











#### Grand Scheme/Goal

What is happening now?

#### **PEOPLE + workflows**





## From Implementation Area to Maturity Stages





## The Full Maturity Model

	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
Program Design	New content, small number of use cases	Refined content based on field iteration	Validated Content used by frontline workers	Frontline worker content stable. New supervisor content created and iterated.	Additional use cases added to technology platform
Data Driven Management	Data collected but not used to improve workforce	Data accessed, but rarely applied	Data periodically used for performance improvement or evaluation	Data regularly used for performance or evaluation	Data used to improve program design. Increasing levels of automation for data-driven management.
Technical Support	Limited technical capacity among program staff	Technical resources existing and trained, starting to use training in the field	Technical resources certified and regularly conducting basic support	Technical resources fully capable, but still needing limited external support	Technical resources fully capable of managing program independently of external support
Training and Implementation	Training and implementation policies not yet modified for mobile tech.	Adapted training and implementation policies to mobile tech.	Training and implementation policies for mobile tech used in practice	Training and implementation practices replicable under a cascaded approach	Training and implementation practices institutionalized and improvements can be rolled out iteratively
Scale	Designing and demonstrating with small number of users	Increasing adoption with frontline workers	Fully deployed with specific target users (or deployment experience). Users demonstrating value	All processes documented and expanding to additional users	Fully deployed to target userbase
Sustainability and Strategic Alignment	Focus within single organization with single source of funding	Building awareness, buy in and support of the program. Aligning to national strategy.	Seeking additional funding based on demonstrated value. Program aligned with national strategy.	Expansion funding secured. Expanding inline with national strategy	Core solution in national strategy receiving core programmatic funding

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## The Full Maturity Model

		Stage 1	Stage 2	Stage 3	Stage 4	Stage 5		
1st Assassment	Program Design	New content, small number of use cases	Refined content based on field iteration	Validated Content used by frontline workers	Frontline worker content stable. New supervisor content created and iterated	Additional use cases added to technology platform	Goal Maturity	
Timeline: 3 years Project maturity: stage 1 – 2	Data Driven Management	Data collected but not used to improve workforce	Data accessed, but rarely applied	Data periodically used for performance improvement or evaluation	Data regularly used for performance or evaluation	Data used to improve program design. Increasing levels of automation for data-driven management.	Timeline: 3 year project Project maturity stage 4 – 5	
Avg maturity: score: 1.5	Technical Support	Limited technical capacity among program staff	Technical resources existing and trained, starting to use training in the field	Technical resources certified and regularly conducting basic support	Technical resources full capable, but still needing limited external support	Technical resources fully capable of managing program independently of external support	Avg maturity: score: 4.5	
	Training and Implementation	Training and implementation policies not yet modified for mobile tech.	Adapted training and implementation policies to mobile tech.	Training and mplementation policies for mobile tech used in practice	Training and simplementation practices replicable under a cascaded approach	Training and implementation practices institutionalized and improvements can be rolled out iteratively		
	Scale	Designing and demonstrating with smal number of users	Increasing adoption with frontline workers	Fully deployed with specific target users (o deployment experience). Users demonstrating value	All processes documented and expanding to additional users	Fully deployed to target userbase		
dimagi	Sustainability and Strategic Alignment	Focus within single organization with single source of funding	Building awareness, buy in and support of the program. Aligning to national strategy.	Seeking additional funding based on demonstrated value. Program aligned with national strategy	Expansion funding secured. Expanding inline with national strategy	Core solution in national strategy receiving core programmatic funding		



#### **Deployment Effort and Maturity stages**



### What kind of data? How will you use it?

















Program Design	Data-driven Management	Technical Support
Training & Implementation	Scale	Sustainability & Strategic Alignment

## Vera Solutions uses cloud and mobile technology to help social impact organizations better track impact and streamline operations.

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# Discussion Q&A

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