

GOAL



LEARNING BRIEF

MAKING STRATEGIC DECISIONS FROM PROGRAMMATIC RESULTS

HOW GOAL DEVELOPED SCORE - A BESPOKE SYSTEM FOR
CONSOLIDATING AND REPORTING MONITORING INFORMATION

DATE

March 2023

THEME

Monitoring,
Evaluation,
Accountability,
and Learning

LOCATION

Global

INTERVENTION DATE(S)

2020-Present

TECHNOLOGY

CommCare is a mobile data collection platform developed by Dimagi. GOAL uses CommCare to build applications for online and offline data entry, which includes case management to track records over time.

Power BI is a business intelligence platform developed by Microsoft. GOAL uses Power BI to analyse and visualise data within interactive reports.

EXECUTIVE SUMMARY

Over the past 3 years, GOAL has developed and deployed an information system capable of storing and processing any type of result from monitoring, evaluation, accountability, and learning (MEAL) - to maximise opportunities for evidence-based decision-making and adaptive management. This learning brief reviews the critical considerations made at the design, build, deployment, maintenance, and review stages to ensure the system was and continues to be fit for purpose. It highlights the change management process required to embed not just a new organisation-wide information system but instil a new culture within it, embracing successes and failures presented by the results, and encouraging different ways of working and staff behaviours. Timely MEAL information is vital for increasing the impact of an international non-governmental organisation (INGO) such as GOAL, and its humanitarian and development programmes. However, technology and data are only part of the solution-people remain at the heart of it.

BACKGROUND

With advances in digital data, there has never been more information available for organisations to understand the context; identify service gaps and support needs; know what works and what does not; and build on previous work to generate greater impact. However, with such diverse data in existence and generated on a daily basis, organisations need affordable and user-friendly systems and processes to help turn information into insight for use in making timely evidence-based decisions to maximise impact.

Most programmatic data for an INGO such as GOAL come through routine monitoring activities. These data are used to calculate indicator results, report progress to donors, and describe the extent of its programming to external audiences. Internally, indicator results are critical insights, highlighting what is working and what is not, from which staff can adapt programmes. GOAL has on average 125 different programmes running concurrently, supporting communities with a wide range of humanitarian and development activities across different sectors and employing different approaches. MEAL departments across country offices are collecting a vast array of data and calculating results for approximately 2,000 indicators every quarter.

However, prior to 2021, GOAL had no centralised system to collate, analyse, and report all these different results, effectively and efficiently. Therefore, GOAL was unable to make strategic decisions based on this rich data, which remained underutilised in thousands of separate documents, spreadsheets, and reports. SCORE, GOAL's System for CONSolidating and REporting MEAL information was developed to resolve this problem.

SCORE is GOAL's **S**ystem for **C**onsolidating and **R**eporting MEAL information. It is a web-based, dual-platform system with data collection and storage in CommCare; and analysis and reporting in Power BI.

SCOREcard is the CommCare web app for recording data. It is used by trained Monitoring, Evaluation, Accountability, and Learning staff in each country office. The app allows these users to set up unique programmatic results frameworks and enter and edit results when necessary. Access is restricted at the country level.

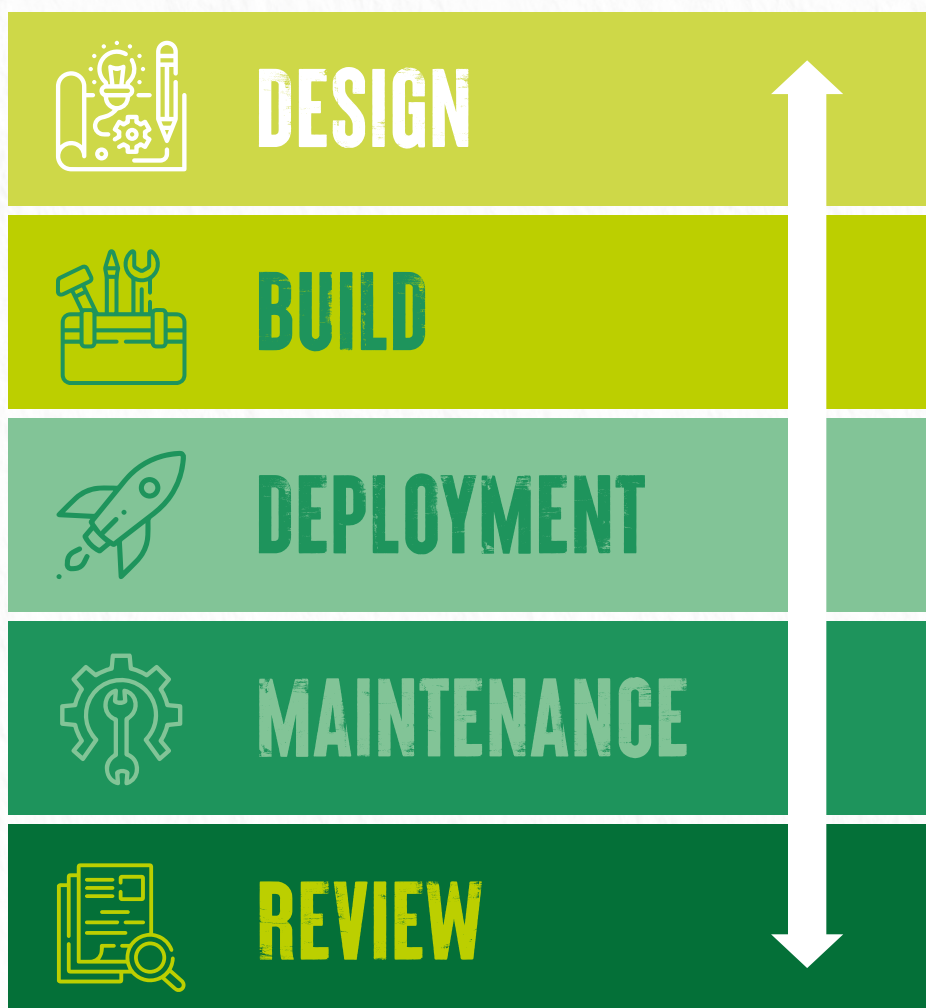
SCOREboard is the Power BI online dashboard for viewing and interacting with the results. It is available to all GOAL staff and contains different sections and pages for reviewing aggregated data at the country and organisational level, as well as at the individual grant level.

The MEAL results contained in SCORE include:

- Total counts of people reached for individual grants; and aggregated unique counts at country and global levels.
- Strategic indicator total results for individual grants; and aggregated unique results at country and global levels.
- Total results for all programmatic indicators for individual grants.
- Counts of communications submitted to GOAL through the Community Feedback Mechanism; anonymised demographic data on the communicants; associated with individual grants and countries.
- Historical summary data of these result types for trend analysis.

I LEARNINGS

There were five critical stages to developing SCORE - a MEAL information system that allows GOAL to have comprehensive and timely results available and accessible across the organisation. These stages were sequential in the first iteration of development and are now revisited cyclically.





DESIGN

For the first design stage, five key questions were asked of staff in different departments and locations at the start of this project to direct the design of the system.

1. WHY IS AN INFORMATION SYSTEM NEEDED?

The purpose of the system was clearly defined, and the functions required were identified.

2. WHAT DATA NEED TO BE IN THE SYSTEM?

The types of results, the format and the source of the data were listed.

3. WHO ARE THE USERS?

All stakeholders, including those entering data and those reviewing the analyses, were mapped and checked against the functions and results they needed.

4. WHEN WILL IT BE USED?

The timeframes for entering data and reviewing results were determined.

5. HOW WILL THE SYSTEM WORK?

Decisions on the technical specifications such as platform, storage, and connectivity, as well as resources required in terms of budget and staffing were made.

Asking these questions across the organisation led to additional insights into the issues that needed to be addressed and were not considered in the original concept. The diversity of the data and possibilities for analysis led to additional functionality and flexibility being required of SCORE, in order to meet everyone's needs.

The principal design decision to highlight was the use of well-established data platforms within GOAL on which to build the system. This preference across the organisation saved costs by making it so we did not have to pay for additional technology; we avoided the 'teething problems' associated with the set-up and use of new platforms; and we reduced the time for development and deployment, as less training was required.



BUILD

To expedite the build stage, an external consultant was commissioned to build SCOREcard, the data collection and storage component of the system. Weekly meetings were held between the SCORE project manager and the consultant to review the system as it was being built; to discuss options and decide on the best methods to build system components; as well as to regularly test the new functionality.

Akin to the design stage, even more questions arose during the build stage, and further deliberation was necessary to ensure the suitability and longevity of the system. Without regular engagement throughout the build, the system would have required more development after testing and

possibly missed out on some necessary functionality that may not have been identified until after the consultancy had ended.

To note, the build of SCOREboard - the analysis and reporting component of the system - was carried out by the GOAL staff who manage the system. The decision to keep this 'in-house' was made because more ongoing maintenance would be required once the system had been deployed to ensure full integration between SCOREcard and SCOREboard at all times; there was a higher likelihood of this part of the system developing further at a later date as reporting requirements increased; and it kept the cost of building the system to a minimum.



DEPLOYMENT

The first part of deploying SCORE was to conduct a rigorous pilot. Three country offices were chosen to take part with differing staffing and capacity levels, as well as results entered and analysed from different types of grants and programmes. During the pilot, additional variables were uncovered and further developments were required to capture more data for processing through the system. The pilot ensured a wide range of scenarios and needs were tested, and that the system had the functionality to deal with all eventualities - not just at the global, organisational level but for country offices as well.

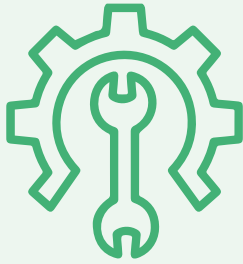
Multiple sets of training for data entry were conducted with small groups of staff, in different languages. The training included group discussions on how the system should be integrated into new ways of working, and practice time using the system with real data being entered. Follow-on guidance was provided in a variety of formats including short step-by-step instructional videos; in-depth written user guides; and an interactive, self-paced e-learning course, in multiple languages. A collaborative open communication channel and online space were also set up to post important reminders about usage, and updates on any fixes; and for users to raise and discuss any issues and improvements. On-going support was also available to avoid users becoming frustrated with unanswered queries they may have had.

Country offices were on a set schedule of progressively phased data entry due to the large amount of data that needed to be entered to set up the system in the first instance. Once the system was up and running, the data entry necessary to keep the system up to date with new information would be less burdensome. In each quarter of the first year, there was an additional result type which needed to be fully reported in the system. Even though this meant it took longer for SCORE to be fully operational, it did avoid excessive pressure on data entry over a shorter period of time and allowed staff to embed the system and alternative ways of working at a manageable and successful pace.

Training was also provided across the organisation on how to access and interact with the results, and how to analyse the reports to gain insight and input evidence into decision-making. These training sessions were at the department level so that they could be tailored to specific needs, demonstrating exactly which reports are relevant for their roles; providing examples of how best to interact with the system; and how the system could be integrated into their standard tasks. For the staff that did not need to access the results on a regular basis and who may forget which reports would be most informative for their role after the training concluded, an additional reference guide was prepared to help with this navigation based on the requirements of their roles.

One incorrect assumption made in regard to training was the ability of staff across the organisation to comfortably use interactive data reports, i.e. dashboards. Many departments at GOAL use dashboards to share information and the same platform has been used for over five years. During the training, more focus was put on explaining the types of results available through SCORE to ensure the data and analyses were being interpreted correctly. However, more basic training was required for staff to use dashboards, and for users to understand and recognise standard functionality such as filtering visuals and navigating in between report pages. Fortunately, at the time of deploying SCORE, this lack of fundamental IT skills had been identified by others. Additional training sessions on dashboard use were planned and conducted, to help staff in the organisation use more data from all necessary departments, not just the MEAL information in SCORE.

The final strategy for deploying SCORE was to make it readily available. The system was linked to the intranet home page of the organisation, with its logo in prime position at the centre of the screen. This helped remind staff to check the system regularly and avoided any time wasted trying to find and access it.



MAINTENANCE

Through the in-built functionality of SCORE's operating platforms, automated warnings were set to flag major system issues, such as the data not being refreshed properly on a daily basis. Very few bugs were identified and fixed after deployment with the system operating as expected. These were only minor issues requiring minimal effort to resolve because so much time and effort had been put into the design, build, and deployment stage, ensuring a high-quality system is easily maintained.

However, more maintenance was and still is required on the quality of data within SCORE, given an information system and report outputs are only as good as the data entered into it. Quarterly quality checks on the data are carried out to flag incomplete or inaccurate reporting which are then corrected by those entering results. Even though the system was designed to avoid 'dirty' data from being entered, automated validations to ensure a 'clean' dataset are not always fully possible, and some manual checks are still required.



REVIEW

A comprehensive review of SCORE was conducted one year after deployment. There were two parts to this review. Firstly, the functionality and technology were checked to ensure accurate data processing. Secondly and more importantly, surveys were conducted with the users, to identify the challenges they have with SCORE, and to gather their suggested improvements to enhance the system's ease and extent of use. Different surveys were conducted with various groups of stakeholders depending on their primary use and engagement with the system. No major problems were identified, but minor changes were made in the second version of SCORE. These developments were guided by the users' feedback to enhance their experience going forward, leading to greater system success in its role within programmatic evidence-based decision-making for increasing organisational impact.

The most significant barrier to the use of SCORE - as noted in the review surveys by staff - was not related to the information system or the data contained within it. It is due to the fast-paced nature of GOAL's programming and operations. Referring to evidence and discussing insight, such as the results in SCORE, was reported as 'time-consuming' when decisions need to be made swiftly and actions put into place as soon as possible. However, from a data perspective, the likelihood and extent of success of these actions would increase if made based on what is known to work, and not work as evidenced by results. Having timely MEAL information accessible across an organisation is a huge accomplishment, but having an enabling environment within an organisation for staff to use evidence in decision-making is of even greater importance.

STRATEGIC DECISION MAKING

A critical component to creating an enabling environment and also change management is 'leading by example', thus GOAL's Senior Management Team (SMT) are key users of SCORE. With the full view of global, country, and programmatic results that SCORE provides, the system supports evidence-based decisions to improve the effectiveness and efficiency of the organisation. SCORE is also interrogated by GOAL's Board at their regular Board meetings and at opportunities as they present themselves to inform strategic decisions at the highest level. Seeing results-based management in practice, programmatic teams follow the example set by leadership. At any time, staff across the organisation use SCORE to make data-driven decisions on programme adaptations to increase the impact of GOAL's work.

RECOMMENDATIONS

- Deploying a new information system in an organisation is a change management process. It is not just a tech solution, as it requires different staff behaviour, task prioritisation, and ways of working.
- People-centric design is key for information systems and data processes to maximise use.
- Not everyone is comfortable working with data and using information systems. Despite an ever-progressing technologically driven world, some people need additional support to become more comfortable and open to using data.
- People learn new systems and processes in different ways. Guidance should be produced in multiple formats for staff to use and there should be a clear line of communication for questions and comments to be addressed as soon as possible.
- An information system is only as good as the data in it. Data validations during entry are not enough for clean datasets. Automated and manual processes for regular quality checks are also required.
- In a fast-paced organisation, decisions based on evidence may not be made despite accessible and available results, due to the perception held by some staff that referring to data insights is too time-consuming. An enabling environment within such an organisation needs to be created for data-driven discussions and evidence-based decision-making.
- The work required to embed an information system is never finished. Technology develops, needs change, and staff turnover. A systematic review, revisiting the original design questions and answers, redevelopment, and training are all required to ensure the system remains fit for purpose.



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