

TOOL N°3

**HR PACK - PROGRAM DATA
MANAGEMENT FOR
HUMANITARIAN AID AND
INTERNATIONAL
DEVELOPMENT CSOs**

« TYPICAL CASE » SCENARIO

A - LIMITED RESPONSIBILITIES, DISPERSED
AMONG EACH PROJECT

CARTONG

Created in 2006, [CartONG](#) is a French H2H/support NGO specialized in Information Management. Our goal is to put data at the service of humanitarian, development and social action projects. We are dedicated to improving the quality and accountability of field activities, in particular through better needs assessments and monitoring and evaluation. We act as a multidisciplinary resources and expertise centre, accompanying our partners' strategies and operations. Our staff and volunteers also support the community as a whole by producing documentation, building capacities and raising awareness on the technical, strategic and ethical challenges of digital technologies.

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1. BACKGROUND DESCRIPTION

Environment within the organisation (structure, project type, etc.)

Projects are not specifically coordinated or articulated among themselves, at least from a data management perspective. Each project may have its own information management process, according to its needs (own tools and data models, etc.) since the data does not need to be frequently aggregated or harmonised at a global level.

This type of background is often that of CSOs working in a development context, managing project portfolios rather than missions. Project managers are very autonomous and may have their own tools and methods, which do not necessarily need to be harmonised at the organisational level.

Needs around data

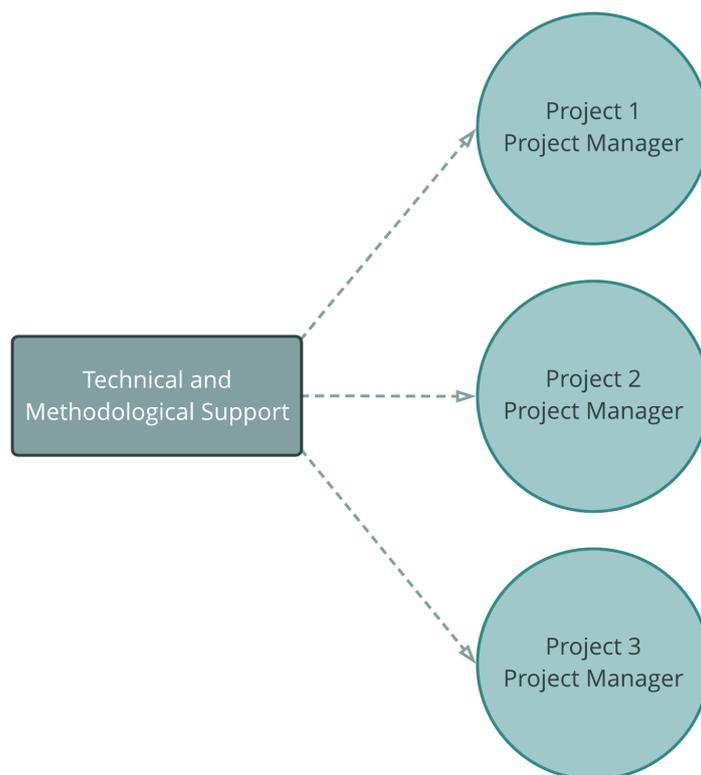
The information required is simple to collect, manage and analyse. This for instance does not apply to case or sensitive data management, to indicators requiring longitudinal analysis or complex calculations. There is a small amount of data to process (table with less than 10,000 inputs): process automation is thus not necessarily synonymous with greater efficiency.

Analysis needs are limited to operational decision-making and possibly simple reporting, thus requiring no extensive expertise around analysis (e.g., statistics) or data visualisation (absence of spatial analysis and dashboard). From a strategic point of view, the needs are fairly basic and boil down to ad hoc, circumstantial and selective choices of data management tools and methods.

2. DESCRIPTION OF THE ORGANISATIONAL SCENARIO

In this scenario, responsibilities are shared between the roles of manager and technical and methodological support: responsibilities are dispersed at project level and the technical and methodological support role provides support only when necessary and/or requested.

Figure 1: Structure of the roles and responsibilities of scenario A



Project Manager role	Technical and Methodological Support role
<p>Depending on the needs of each project, the level of responsibilities related to program data management may vary slightly but remains concentrated around direct execution tasks. If strategic responsibilities are needed, they are confined to each project. The job description is not exclusively devoted to program data management but for it to contain assigned responsibilities is rather useful.</p> <p>These responsibilities may be exercised directly by the Project Manager or distributed amongst the Project Team (lead, assistant).</p>	<p>In this scenario, the responsibilities related to program data management technical support may be fulfilled by a person at headquarters or in coordination/capital, or even directly in the intervention area (for example a technical referent). The location of the post (headquarters/capital/field) will depend first and foremost on the number and size/complexity of projects to be supported and on whether remote monitoring is possible.</p> <p>It is not mandatory for the job description to be purely devoted to program data management but for it to contain assigned responsibilities is rather useful.</p>

The **Project Manager's role** in this scenario consists, from a methodological point of view, in preparing the data management plan for the project in question: assess and anticipate data collection, process, analyse and protect needs during the project cycle, and select appropriate tools. This role is also responsible for the preparation and maintenance of the databases, from organising data collection to preparing the questionnaire and finally, to exporting the data. The Project Manager is also directly responsible for data analysis and for realisation of the analytical visuals (graphic or simple map). Finally, the person occupying this role is required to guarantee application of the organisation's directives in terms of data protection (e.g., password protection).

Project Manager roles can receive **technical and methodological support**, from one or several referent persons, more experienced and competent in data management. Said support can be methodological (analysis of collection needs throughout the project cycle) or technical (collection, database management, production of analyses and visuals). Support should also be able to provide basic guidance elements (e.g., data protection or quality, drafting of procedures, etc.).



Headquarters’ involvement: The crucial involvement of headquarters in this scenario lies in the provision of technical and methodological support to accompany the data management processes in the field. If such post is not provided for at headquarters, it is necessary to either provide a budget to outsource this function (c.f. Possible adjustments section) or ensure that people in the field have the minimum skill levels (c.f. Risks section).

3. BENEFITS, LIMITATIONS AND RISKS



The **advantage** of this scenario is that it is flexible and easy to implement, allowing managers a broad margin for manoeuvre, as the latter can benefit from specific or ad hoc support when needed.



This scenario undoubtedly has its **limits** for an organisation, particularly for a humanitarian NGO, which must compile data and provide said data responsively to enable good coordination in response to crisis. Indeed, this scenario makes it impossible to operate efficiently when it comes to harmonising and aggregating data, given that each project manages its data independently. It also requires recruiting project managers or project teams with a fledgling interest for data management, which is not always feasible. Nor is this scenario appropriate when an organisation wishes to have aggregated data on which to demonstrate its impact as an organisation (OSC data driven) or document its advocacy.



The associated **risks** are above all failing to provide an organisation-wide vision because of a project-centric analysis that is not necessarily transposable on a macro level. This could lead to erroneous aggregation of data (e.g., using non-compatible data formats).

A lack of capitalisation and defined data management policy in an organisation such as this can lead to the loss of effective working methods in the event of employee turnover since processes are left to the discretion of project managers.

More generally, particularly if the technical and methodological support role is not available, there is a high risk of technical and methodological errors (erroneous analysis, non-protection of personal data etc.). As data management skills are increasingly complex and diverse, it is indeed becoming more difficult, if not impossible, to find project managers with sectoral, project management and cross-disciplinary (such as in data management) skills. Without adequate support, the organisation must also be prepared to endure recurrent setbacks (inappropriate choice of tools, data loss, etc.) or even to endanger certain populations or players, in the event for instance that said organisation is not conscious of storing sensitive data without adequate protection.

4. POSSIBLE ADAPTATIONS OF THE SCENARIO

Possible variations occur mainly around the types of posts that concentrate responsibilities and skills, depending on the need for technicality but also on available profiles:

Adaptation 1 – Addition of an M&E/program data management focal point at the project role level

Instead of being at the heart the project, and especially where there is more than one project on the same theme, an M&E role independent of the project team can focus the greater part of the program data management skills mentioned above, in coordination with the project team, on methodological responsibilities.

This could provide an alternative to technical support, especially when more advanced technical and methodological execution skills are needed at field level. Similarly, if multiple projects are implemented in the same area, this allows for skills to be concentrated into a single post. It is however necessary for the person recruited to this end to have sufficient program data management capabilities that fall within the scope of the above-mentioned responsibilities.

Adaptation 2 – Case management or sensitive data collection

Case management, i.e., longitudinal follow-up via the repeated collection of data from the same individual or regarding the same entity (ex: monitoring of water points), calls for advanced skills in the preparation and maintenance of databases, the organisation of said collection – particularly in the selection of suitable software – but also as regards quality and traceability of the data. Similarly, in the case of personal and sensitive data collection (medical data, activists’ data, etc.) it is absolutely necessary that data protection-specific qualifications be demonstrated.

More broadly, complex treatments such as case management or sensitive data collection require more accomplished methodological planning. Therefore, in most configurations, [scenarios B](#) or [C](#) are recommended, subject to risk and error.

Adaptation 3 – Outsourcing of certain technical skills

Instead of having a methodological and technical support function in coordination or at HQ, the latter could potentially be outsourced, particularly in the event of ad hoc and advanced technical needs. This is particularly the case for data visualisation responsibilities, such as mapping or the creation of complex dashboards.



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