TOOL N°3

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

« TYPICAL CASE » SCENARIO

B - TECHNICAL RESPONSIBILITIES APPLIED TO AN INTERVENTION SPECIALITY

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AUGUST 2022

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.

ACKNOWLEDGMENT

This publication is supported by the French Ministry of Europe and Foreign Affairs (MEAE-CDCS), the French Development Agency (AFD). Nevertheless, the ideas and opinions presented in this toolbox do not necessarily represent those of MEAE-CDCS and AFD.

1. BACKGROUND DESCRIPTION

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

This scenario mainly corresponds to organisations whose activities focus on an area of intervention in which they have an established expertise, such as strengthening health systems, combating deforestation, etc. This case is particularly relevant to organisations involved in development, but also to thematic humanitarian organisations.

The organisation uses either its own technical solution (developed especially for it) or a solution that is specific to the area of intervention, such as DHIS2 (health) or mWater (WHS). This solution can be developed directly by the organisation or provided by an external provider. The organisation's means of intervention are then coordinated around the technical solution used (for instance, in the case of patient management software) and the latter forms an integral part of the organization's intervention logic.

Teams are often made up of technical experts in the field of expertise (e.g., doctors, agronomists, hydraulics) and their members may also have data management skills, such as dual data processing skills. In this respect, experts in program data management with sector-based specialisations do exist on the labour market.

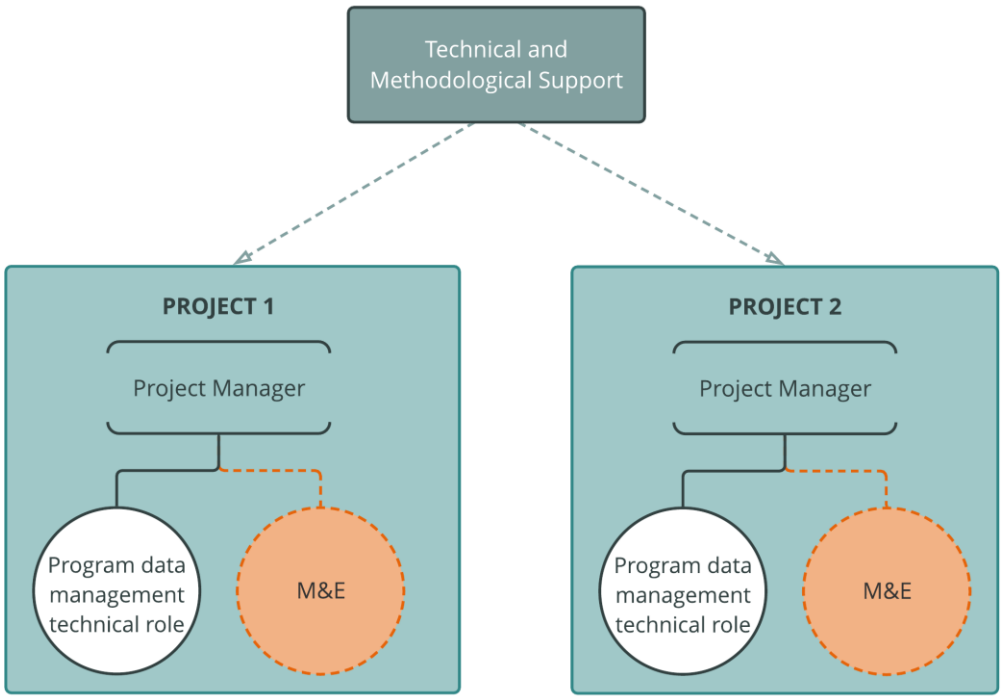
Needs around data

As data management is part of the organisation's intervention logic, the volumes to be managed are significant and the needs complex, both in terms of collection (longitudinal monitoring for instance) and analysis and processing (cross-referencing numerous data sources, dynamic visualisations, amongst others).

2. DESCRIPTION OF THE ORGANISATIONAL SCENARIO

In this scenario, the responsibilities pertaining to methodological planning, data collection and management, as well as the processes guaranteeing their quality, are central. The importance of responsibilities in favour of visualisation and data protection varies from one organisation to the next, depending on the area of intervention and the type of data collected. Globally, in this scenario, expectations in terms of technical skills are high. As in the previous scenario, responsibilities are present at two main levels: technical support, which corresponds to a technical support and training role and project, which nonetheless comprises several roles: (i) a management role, there to define needs and guidance (ii) a technical role in program data management and (iii) possibly a complementary M&E role with limited but necessary data management skills.

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



Technical and Methodological Support role	Project Manager role
In this scenario, the responsibilities related to the technical and methodological support of teams may be fulfilled by a person at headquarters or in coordination/capital, or even directly in the intervention area. This role can for instance be held by a technical referent.	In this scenario, the Manager role refers to the responsibility for consistency of program data management processes that can be achieved by guiding the strategy, based on the technical skills of the colleagues that the role is managing. These responsibilities may be carried out directly by the Project Manager.
Program data management technical role	**M&E role (optional)**
The level of responsibility and the type of technical skills required for this role will vary from one project to the next depending on the needs (e.g., spatial visualisation or not). Ideally, this role should be held by a dedicated project team member such as a program data management specialist or manager (i.e., a cartographer, a health database manager, etc.)	Here, the M&E role refers to the responsibilities and competencies linked to the "simple" tasks of managing data related to the Monitoring and Evaluation plan, such as data collection or aggregation for indicators. The purpose of this role is to facilitate collaboration with the program data management specialist. This role is held by the project M&E Manager or by a member of his/her team.

The **Project Manager role** is central to data management in this scenario. Strategically, it is indeed essential that the technical role be supervised by someone capable of understanding the basic issues surrounding data management. The Project Manager provides the person taking on the technical responsibilities with guidance on data management and contributes his/her expertise to both activities and M&E. He or she determines the strategic orientations (priorities, resources allocated) and handles the program data management technical role.

The person who holds the **Program Data Management Technical Role** is responsible for day-to-day data management, from collection to analysis. This role must execute requests made by the project manager, whilst guiding him/her towards program data management best technical and methodological practices. He/she escalates the issues that he/she encounters and popularises them to help the project manager make the best decisions.

The **M&E role** is optional in this scenario, according to needs. If the technical role focuses too much attention on day-to-day activities surrounding data, he/she may be less available to support ad hoc monitoring and evaluations (surveys, etc.). It is therefore important that the M&E teams are able to either collect and manage their own data for monitoring and evaluation, or to collaborate appropriately with the technical role. In both cases, the M&E role should have at least some basic skills in data collection and management, but above all good knowledge of the issues concerning data and the ability to anticipate the data management needs of the Monitoring and Evaluation plan.

The **technical and methodological support role** should be filled by one or several persons with proven experience in data management. It is, above all, a role meant to provide advice on data management strategy and determination of data quality. Its added value also concerns the responsibilities that come with (i) training specific technical teams and (ii) cross-training all teams in order to reinforce a data-driven culture within the organisation.

Headquarters' involvement: When the Technical Support and Training collaborator is based at the organisation's headquarters, he/she may collaborate with one or with several different services (operations, quality, IT, innovation…), and one or several persons may fill the role depending on the areas of intervention. An IT-specific role may also be necessary to manage purely IT aspects and/or the relationship with the operator providing the tool, for instance if a solution requires managing a server at the corporate level.

3. BENEFITS, LIMITATIONS AND RISKS

This scenario has the **advantage** of being flexible, allowing the project managers a great margin of manoeuvre. It allows for **very specialised and project-specific technical skills** to be provided and for a thorough response to be given to said projects.

This scenario does, however, have its **limitations** for an organisation, such as a humanitarian NGO (that must compile data, provide said data in a reactive manner to enable good coordination in response to a crisis) or for a multisectoral CSO (that in this case has to manage very specialised

approaches from one sector to another). Indeed, this scenario makes it impossible to operate efficiently when it comes to harmonising and aggregating data, given that each project and sector manages its data independently. It also requires recruiting project managers or project teams with a fledgling interest for data management, which is not necessarily common.

In fact, if the project manager struggles to understand the issues around data management, the **risk** of developing inappropriate or inefficient schemes is high. The lack of methodological and strategic guidance dedicated to the program data management technical role, which does not necessarily have an overall vision, leaves the latter room for much flexibility.

More generally, particularly if the project manager does not have the necessary methodological skills, there is a high risk of methodological errors (erroneous analysis, non-protection of personal data, etc.). Moreover, as data management skills are increasingly complex and diverse, it is becoming all the more difficult, if not impossible, to find project managers with a combination of sectoral, project management, and cross-disciplinary (such as in data management) skills.

4. POSSIBLE ADAPTATIONS OF THE SCENARIO

Adaptation 1 – Projects that are less program data management-oriented than others

Within the same organisation, each project may have different data management needs. Not all projects will necessarily need a program data management technician; so, within the same country or organisation it is possible that scenarios A and B coexist.

Adaptation 2 – A project manager with no program data management skills

If the project manager, who should naturally assume the role of data management manager, has only a weak data culture and few methodological or strategic skills, it is important that a third party fill that role. This can be endorsed by another person on the project team, or a single person may fill both the roles of Data Management Manager and Program Data Management Technician. It is then necessary that this person possess all the skills related to both roles, which is generally unusual and therefore represents a risk. The involvement of the technical and methodological support role henceforth becomes crucial.

Adaptation 3 – A need to aggregate data, via internationally shared indicators

In this case, the technical support should provide specific information and guides for collection and training to ensure harmonisation and consistency of data. In this scenario, outsourcing technical support makes little sense.

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