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

« TYPICAL CASE » SCENARIO

C - COORDINATED GENERAL RESPONSIBILITIES

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

1. BACKGROUND DESCRIPTION

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

The coordinated management of program data at national level (mission) is necessary and warrants the development of a common strategy: for instance, the same program is implemented in different areas and requires the implementation of identical program data management processes or an integrated and promoted multi-sectoral approach, requiring the interoperability of data collected by different sectors/projects. Data management needs remain impelled by situations in projects and areas of intervention, but the strategy is first and foremost coordinated at the national level.

Needs around data

The need to harmonise data models between projects or areas further increases the need for data traceability and quality. The collected data is primarily used for operational decision-making and Monitoring and Evaluation, without the need for extensive data visualisation skills (e.g., dynamic or spatial visualisation).
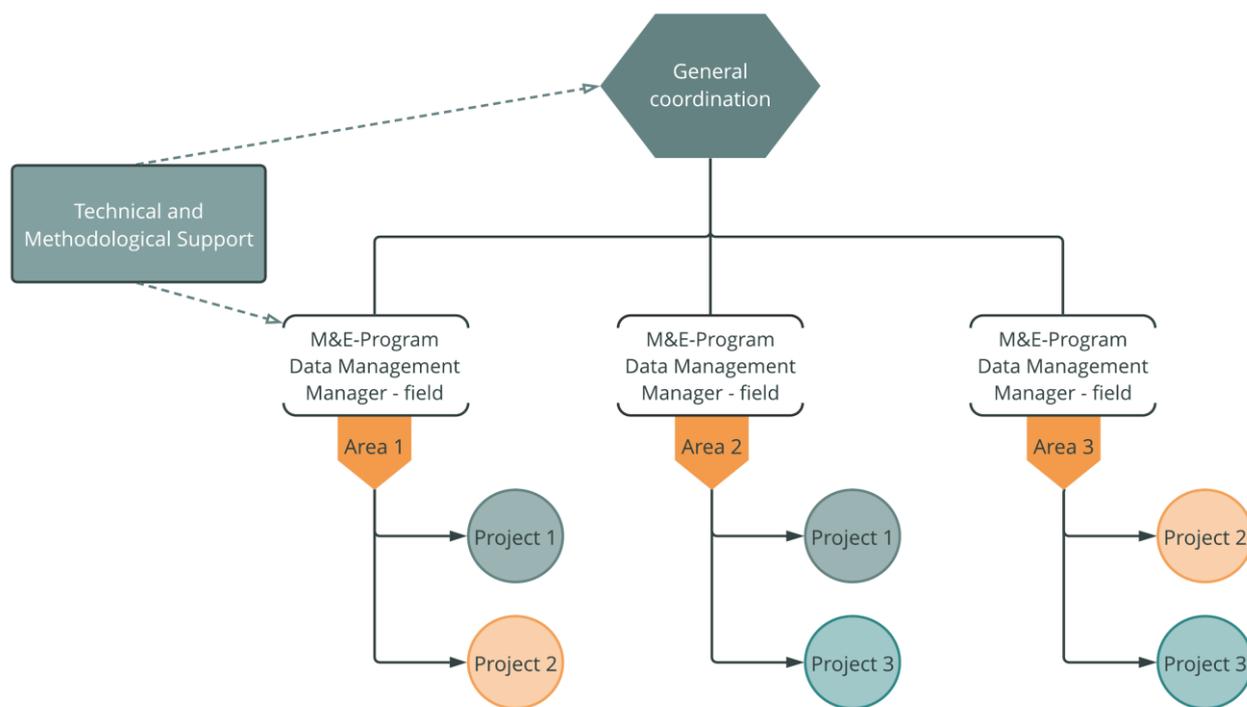
The technical solutions used to manage these needs remain simple and limited in number. For instance, a mobile data collection solution combined with spreadsheet software and a GPS point visualisation solution is enough to manage and analyse all of the data.

Data protection responsibilities depend on the type of data collected, though minimum awareness of standards is nonetheless required.

2. DESCRIPTION OF THE ORGANISATIONAL SCENARIO

In this scenario, the methodological and technical skills primarily related to execution are concentrated in the "M&E-Program Data Management Manager" role, whilst the national data management strategy is concentrated in the "General Coordination" role, preferably in a specialised post, such as M&E coordinator. Project managers are also involved to better understand the implication of program data management and to cooperate with the M&E – Program Data Management role to ensure proper implementation of the national strategy in terms of program data management for their project / area. The technical and methodological support function is also involved.

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

General Coordination role	M&E-Program Data Management Manager role (field)
At the coordination level, data management responsibilities are primarily strategic and methodological. They should be used to guide the action of roles with technical expertise on the projects.	At M&E level, the competencies held are above all related to the direct implementation of data management processes.
It is not mandatory for those persons with such skills to have a job description devoted to data management, they can for instance be an M&E Coordinator (or failing that, a Program Coordinator).	This role can be filled by either the M&E Manager or his/her teams in each intervention area.

Technical and Methodological Support role
In this scenario, the responsibilities related to technical and methodological support of the teams can be exercised at headquarters.
This role can for instance be filled by a technical referent in information management.
The purpose of this role is to provide technical and methodological support to program teams, inter alia, in data management aspects, but it generally does not have a direct hierarchical link.

The **general coordination role** has a strategic and methodological advisory function, to guide the persons occupying M&E-Program Data Management roles in each of the areas/projects towards good data management practices (drafting framework documents, dissemination etc.). Its main objective is to create a coherent management and analysis system between areas and projects, enabling aggregation and harmonisation of data (data flow management, standardisation of tools etc.). He or she should be able to compare the setting of collection and Monitoring & Evaluation plan goals with the data harmonisation strategy at national level. This role is also responsible for overseeing data management platforms, including access administration.

The **M&E-Program Data Management Manager role** can be organised in such a way that there is either one person in each area, such as an M&E Manager, or an entire team. This choice depends first and foremost on the Monitoring & Evaluation needs for each area (not covered in this document).

The purpose of this role is to provide programs with support on certain "common" methodological aspects: identification of collection needs throughout the project cycle, preparation of data collection and development of analysis plans.

From a technical point of view, the person filling this role codes the collection questionnaires. He or she creates, adapts and manages databases. He or she performs the analyses and associated visualisations and is able to provide a basic interpretation.

He/she is also responsible for the implementation of data processing processes in his/her area, henceforth ensuring traceability, reliability and data quality (such as data preparation, cleansing, triangulation and validation). He/she is also the guarantor of the application of data protection directives provided by the coordination or headquarters and needs to be familiar with basic good practices (framework, data to be protected, current data protection practices).

This role does not always have a strategic choice of tools to use but adapts them to meet the needs of each project, while ensuring the possibility of compiling data at a higher level (harmonisation).

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 in data management strategy and determination of data quality. Its added value also concerns the responsibilities that come with (i) technical training of teams specialised in program data management and (ii) cross-training all teams in order to reinforce a data-driven culture within the organisation.

> 📌 **Headquarters' involvement:** The 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 a post is not provided for at headquarters, it is necessary to allocate a budget to outsource this function or ensure that people in the field have the necessary skills.

3. BENEFITS, LIMITATIONS AND RISKS

This scenario has the **advantage** of introducing a structure, from a data management point of view, when needs remain simple (no case management, no dashboard, limited mapping). It allows for consideration of a simple data management strategy with the M&E resources serving a mission.

However, this scenario remains **limited** to situations where needs are simple because it cannot meet very specific demands. Otherwise, it would be absolutely necessary for managers to have highly developed program data management skills. But it is, in fact, very difficult, if not impossible, to recruit a profile with advanced skills in both these areas.

The lack of adequate skills entails the **risk** of reducing Monitoring & Evaluation to data management. It is therefore essential to reflect on the distribution of M&E and program data management responsibilities when defining a job description to ensure that the needs in both areas are met.

There is also a risk that the technical skills of M&E-Program Data Management Managers will exceed those of the coordination role, without necessarily having any strategic or overall vision. This could lead to the deployment of poorly considered tools, devoid of overall logic, and eventually become counter-productive.

This scenario is preferred by numerous organisations, but is not recommended in many cases, as it is quite common for data management needs to actually be more complex than those envisaged (poor baseline assessment, medium-term evolution of the context).

4. POSSIBLE ADAPTATION OF THE SCENARIO

Adaptation – Outsourcing of visualisation skills

If needs for analyses and advanced visualisation (mapping, dashboards) are required on an ad hoc basis, it is possible to adapt the scenario by outsourcing the skill and calling upon an external resource. This resource may be located at headquarters or be an external consultant.

➔ In the case of an external consultant, it is necessary for a person within the structure to have the necessary skills to guide the provider and be able to prepare the data and describe the need.

If these needs are more frequent or even permanent, it is recommended to transition towards scenario D.

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