TOOL N°3

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

« TYPICAL CASE » SCENARIO

D - TECHNICAL, SPECIALISED AND COORDINATED 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

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1. BACKGROUND DESCRIPTION

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

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 development of identical program data management processes, or the program is built around an integrated multi-sectoral approach, requiring the interoperability of data collected by different sectors/projects. Similarly, the organisation can work with several partners, such as local partners, requiring guidance on the collection, management and use of program data.

On an ad hoc basis, projects led by the organisation may include the need to follow people or infrastructures at different points in time (longitudinal analyses, such as Knowledge, Attitudes and Practices – KAP investigations).

Similarly, the nature of the projects implies that the organisation frequently collects personal and/or sensitive data from populations.

Needs around data

The volume of data collected is significant and comes from a variety of sources. The need to aggregate data from several intervention areas requires harmonisation of data models, and thus upstream preparation, as well as traceability and increased data quality. It is useful to apply standard workflows.

The organisation wants to be able to easily integrate and analyse partner data, which involves backing them in the management of their data.

The type of data collected is varied, resulting in analyses which in themselves are very diverse (map, statistics, graph, lexicometrics) without necessarily resorting to automatic integration into a visualisation system (e.g., dashboard or dynamic map).

To meet this need, a patchwork of technical solutions is used. The use of these analyses is broad, going beyond operational decision-making or M&E, and can be shared externally for coordination, communication, or advocacy.
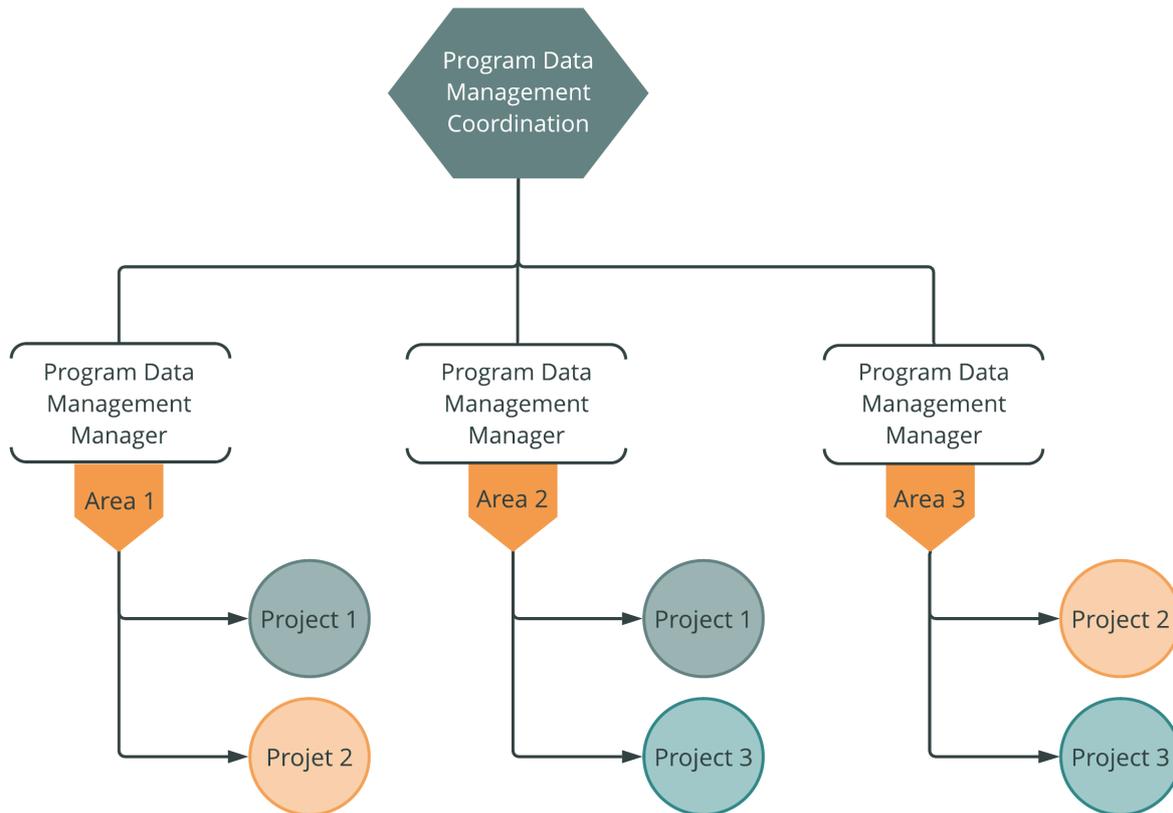
Since the data collected may be sensitive and/or personal, it is essential to implement good data protection practices in a systematic and coordinated manner, be they proportionate and adapted to the operational context.

2. DESCRIPTION OF THE ORGANISATIONAL SCENARIO

In this scenario, the methodological and technical responsibilities, mainly related to execution, are concentrated in the "Program Data Management Manager" role, whilst the data management strategy is concentrated in the Program Data Management Coordination role. A coordinator and performers with expertise in program data management are preferred in this scenario because data-related needs require advanced skills. A scenario with non-dedicated positions, assuming non-technical profiles but also less time for program data management, could lead to quality problems, failure to meet needs, and a significant risk for data protection.

Here, M&E responsibilities are in the hands of roles that are separate from those who bear program data management responsibilities. This provides assurance that each part can focus on its own responsibilities. M&E roles are not represented here, it is nonetheless essential to ensure coordination and collaboration between both types of activities.

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

Program Data Management Coordination role	Program Data Management Manager role
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 areas of intervention and projects. The person in this role is involved in all matters related to program data management, leading teams with advanced technical skills in the areas of intervention, and therefore needs a thorough understanding of issues surrounding the data. The person taking on these responsibilities must have a job description devoted to data management, such as a Program Data Management Coordinator.	The main responsibilities of this function above all cover pursuance of the strategy and the direct implementation of data management processes. The Program Data Management Manager is capable of responding to fairly advanced technical requests on intervention areas and to support project teams in managing their data. This role should be filled by a post entirely dedicated to data management, such as a Program Data Management Manager or officer. **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 relationship between these two roles can be either hierarchical or functional, depending on the organisation's structuring model.	

The **Program Data Management Coordination role** has strategic and methodological responsibilities first and foremost. Its main objective is to create a coherent and functional program data management system between areas and projects, while needs around the data are clearly complex. This position ensures the consistency of data models and tools, good management of information flows and the aggregation of data. The person filling the coordination role chooses the technical tools to be used and manages access to data collection/management platforms. He/she prepares good practice framework documents and ensures their dissemination. He/she ensures a clear understanding of data issues through ad hoc training and coaching, helping to improve the data culture both within the structure and with the partners. He/she provides guidance, at least functionally, to Program Data Management Managers, and methodological support to partners.

At the same time, the coordination role is the guarantor of responsible data management. He/she must thus ensure that the principles, legislations and best practices of the sector are implemented, both in terms of data protection and security. He/she must also be able to raise awareness among his/her colleagues and identify areas of improvement.

The person in charge of coordination may be required to perform ad hoc analyses/visualisations, aggregating data from several areas. This should not however take up the majority of his/her schedule, given that strategic and methodological support to the Program Data Management Manager remains his/her priority in this scenario.

The **Program Data Management Manager's role** is above all a technical profile in charge of execution in data management within his/her intervention area or project. His/her responsibilities focus on managing data collection, structuring, production, analysis and visualisation activities. Regarding structuring and collection, the Program Data Management Managers encode data collection questionnaires, and provide technical support to enumerators. The person filling this role is also responsible for creating or adapting and managing databases, mastering the use of data management platforms. He/she also implements data processing processes ensuring traceability, reliability and quality (such as data preparation, cleansing, triangulation and validation). **From an analysis point of view**, teams should be able to interpret the program's information needs in terms of analyses and perform visualisations, going beyond simple analyses on Excel, on several types of data. They also can be experts in a particular tool (ex: QGIS for map making). They are able to provide an interpretation of the analyses carried out and guide the use of the data.

At the same time, this function is also responsible for supporting programs and the M&E department on certain small-scale methodological aspects, such as identifying collection needs at project start-up and thus preparing data harvesting, management and analysis plans. The Program Data Management Manager should be able to identify the technical implications of data management related to the needs

expressed by the program or the M&E teams. The person filling this role should make recommendations for the calculation of indicators and the Monitoring & Evaluation plan.

This post should in no way replace the M&E role. Program Data Management technically supports M&E but cannot substitute a person with technical responsibilities and skills for Monitoring and Evaluation, since these are clearly distinct from program data management.

From a data protection and security standpoint, the Program Data Management Manager is responsible for seeing to it that the directives issued by coordination are properly followed. He/she also raises awareness among all teams in his/her area of good data protection and security practices.

The recruitment of highly technical data management personnel in the field inevitably implies the presence of a role to supervise these teams (i.e., the coordination role) and to guide them via the development of a strategy. This person must therefore possess a solid set of skills, specialised in program data management.

Headquarters' involvement: This scenario is advantageous when the organisation's headquarters have little to no structure in project management. Field teams are autonomous and competent, requiring moderate involvement from headquarters. However, if the program data management activities implemented for the mission significantly exceed the skills of collaborators at headquarters, this may result in:

1. A lack of interest in the subject and lack of capitalisation, preventing the reuse of program data management methods and tools in other missions.

2. The adoption of processes and procedures relating to program data management or particularly outdated and inappropriate tools, leading to frustration among the teams.

3. The inability of the coordination role to communicate with a referent in his/her organisation, which may also lead to frustrations, loss of information etc.

When this type of scenario becomes frequent in an organisation (the case repeats itself over the course of several missions), it may then be interesting for headquarters to structure itself in order to make relevant strategic decisions to improve overall program data management within the organisation (e.g., choice of tools, protocols, harmonised methods).

3. BENEFITS, LIMITATIONS AND RISKS

The **benefits** of this scenario are, among other things, having people who are dedicated to data management. This enables work on complex issues such as harmonising data models from multiple sources, longitudinal analyses, and providing high-quality visual representations.

In addition, the presence of a dedicated Program Data Management Coordination role allows for technical profiles to be properly supervised in each intervention area, guided by a clear strategy and methodological advice. To achieve this, the person in charge must be able to understand the technical challenges and opportunities of the solutions proposed by the field. This also represents a major advantage when few program data management resources are available at headquarters, with field teams being autonomous.

Finally, the clear separation of M&E and program data management responsibilities into distinct roles helps ensure that everyone can focus on their own responsibilities, thus guaranteeing a higher quality of activities and the ability to recruit profiles with in-depth expertise in their respective areas.

This scenario, on the other hand, may have certain **limitations**. Where the coordination role is to perform a number of technical tasks (administration of the management platform, aggregation of databases, conduct of analyses and creation of visuals on aggregated data), these can overlap the time needed for coordination and reflection with a view to elaborating a substantive data management strategy. As such, if highly technical achievements are needed, it may be beneficial to transition towards Scenario E, or to outsource said achievements.

This scenario is not appropriate either when case management is an essential component of projects (e.g., patient data management in the case of a medical intervention). In this scenario, there are not enough human resources to manage this at the mission level; and more technical support may be required to support Program Data Management Managers in the field.

The major **risk** of this scenario stems from the challenge of conceiving workflows between program data management roles and M&E roles, which can lead to some complexity in delineating the boundaries of each individual's responsibilities. It is therefore essential to reflect on the distribution of activities between the two roles, both at the coordination and implementation levels.

4. POSSIBLE ADAPTATION OF THE SCENARIO

Adaptation – Different levels of needs from one area to another

In some missions, needs may not be equivalent from one intervention area to another, from a data management perspective: some areas do not necessarily require a Program Data Management Manager, but the presence of an M&E manager is paramount. Finally, some organisations do not always have the financial resources for both posts to be present in each intervention area.

It is thus possible to be in a mixed scenario with Program Data Management Managers and M&E-Program Data Management Managers according to priorities and areas.

➔ The choice between an M&E manager and a Program Data Management Manager is not always easy to determine; a number of important elements need to be taken into consideration. For example, if the sector is very technical and well-managed, it may be more advantageous to recruit a Program Data Management Manager, as Monitoring & Evaluation will be carried out by the program teams themselves. Whereas if the sector requires an in-depth reflection on M&E, it is essential to have a profile that is geared towards this field, especially if the volume and use of data is limited.

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