M&E PLAYBOOK

The Ultimate Four-Step Guide to Centralizing Digital Data Collection

dimagi

Overview & Goal Of This Playbook

Drawing from real world examples and best practices, this playbook lays out a four-step process for M&E professionals to centralize digital tools within their social impact organizations.

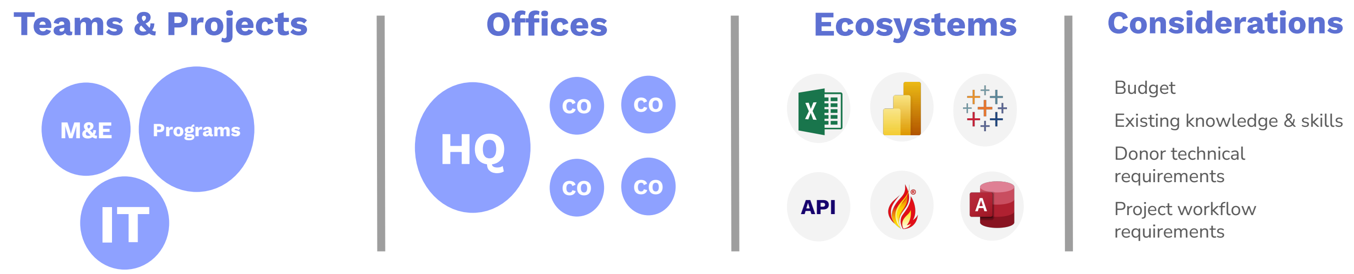
Most social impact organizations recognize the critical need for real-time, actionable data to thrive in today's fast-paced world. Digital tools used for data collection, service delivery, and analysis enable organizations to gather cleaner data more quickly and efficiently, and better drive their Monitoring & Evaluation outcomes.

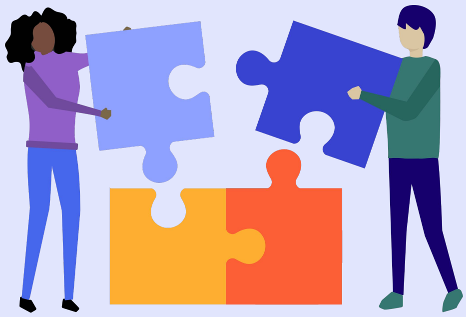
Organizations commonly grant each project team or country office the autonomy to select the tools best suited to their specific needs, prioritizing four key factors: budget, existing knowledge and skills, donor technical requirements, and project workflow requirements.

While consideration of these factors are crucial, challenges often arise when different projects or country offices or individual projects procure their own tools *based* on their own interpretation and priorities around these four requirements. It may seem initially advantageous to an organization to allow each of their offices and projects to select their own tools tailored to specific needs and staff skill sets, however the autonomy granted by decentralized procurement often results in inefficiencies, such as various projects utilizing over 10 different tools for similar tasks. You may find that consideration of a more centralized approach to streamline digital tool selection, and enhance overall organizational efficiency, may align better with your strategic goals.

Many social impact organizations have made this transition, and while it is neither swift nor seamless, this playbook details some of the necessary steps to succeed. Your organization will be investing in so much more than a technology - they will be investing in a change management process that aims to create a catalytic shift toward accurate and accessible data.

When selecting your digital tool(s), there are lots of different factors to consider





Why Centralize?

Organizations unlock several benefits by centralizing their digital tools, while still allowing individual project teams to maintain freedom in customizing digital applications and surveys.

Procuring software on a project-by-project basis often incurs higher costs than bulk acquisition of tools. Each project must contend with variations in pricing models, which results in unexpected expenses. Integration with additional tools, such as BI tools or SMS gateways, may also introduce additional costs, potentially making seemingly "cheap" options expensive at scale.

Bulk purchasing can lead to substantial economies of scale and discounts, allowing project teams to select premium tools at lower costs.

By deciding on different tools, individual project teams waste time on duplicating processes, such as tool selection, pricing, and contract negotiations. Furthermore, project teams aren't able to take advantage of inter-team learning and upskilling. This approach also requires HQ teams to build expertise in a variety of tools, decreasing their ability to effectively support problems.

With a central tool, users can speedily jump into and derive value from tools through better support and coordinated community of practice, while readily sharing insights across teams.

Reduced **Costs**

Greater **Efficiencies**

Increased **Quality**

Tighter **Security**

When data is collected across various software platforms with diverse applications or survey tools, ensuring the reliability and cleanliness of the collected data becomes impossible. The use of different tools across projects limits the global M&E teams' ability to easily access standardized data aggregated from all projects simultaneously.

By using a shared digital tool, M&E experts can better control, coordinate, and manage data indicators and reports, leading to greater value.

Ensuring compliance with stringent data security and privacy standards (e.g., HIPAA and GDPR) becomes increasingly challenging when multiple tools are concurrently employed, making it difficult to guarantee adherence to these requirements.

A central tool can ensure that all country offices and projects adhere to the highest standards of data protection set out by HQ.

4 Steps to Centralizing Digital Tools for Monitoring & Evaluation

1. Build a Dedicated Taskforce
2. Conduct an In-Depth Needs Assessment
3. Select the Right Partner & Tool
4. Successfully Roll Out your Tool

1 Build a Dedicated Task Force

For the implementation of an organization-wide digital tool, securing buy-in across the entire organization, from country offices to senior leadership, is critical.

It is important to build a compelling case with the organization's leadership, convincing them why they should embrace centralization. Transitioning to a new tool will require time, effort, and energy. This underscores the importance of ensuring that everyone sees the value and is fully committed to the process. This is more than a procurement or digital tool change, this is a change management process that needs to be handled carefully and will take time and effort.

To ensure success, assembling a multi-disciplinary task force with the expertise and management backing, willing to roll up their sleeves and dive into the work, is essential. The taskforce may include members from M&E, programs, IT, Communications, and ICT4D/digital teams, promoting collaborative efforts to assess the extent of misalignment across various platforms and identify streamlined solutions. The task force's initial steps should include:

Define Clear Terms of Reference

Clearly articulate the task force's mission, deliverables, and criteria for success. This should align with how the task force's results will support the organization and each with how the task force's results will support the organization and each team.

Demonstrate the Value Proposition

The task force should effectively communicate the "what's in it for me" for each major stakeholder. The selection of this tool should matter to everyone in every department throughout the organization.

“Ensure you use the language for each department that is relevant to them when you communicate the tool. For example:

M&E/MEAL teams may use the tool as a support function for fulfilling donor requirements.

Business development teams manage proposal budgets which is the source of funding.

Procurement can create exceptions that allow integration of the tool into long-term agreements or create exceptions that prevent the necessity to frequently re-tender.

Sector leadership may want the data to understand how their division is successful within the programs. They may want a standardized tool to compare data across countries.

Communications teams need accurate reach data for external communications. Good data collection tools are critical so they can avoid double-counting.”

2 Conduct an In-Depth Needs Assessment

When selecting any software, it's crucial to first understand your users' roles, frustrations, and priorities. Introducing a tool without considering the experiences of the teams that will utilize it is a recipe for failure. To avoid these common challenges, follow these three simple steps:

1. Dedicate time to gain insights into the challenges they face and their desired features.
2. Maintain ongoing communication and involvement with users throughout the process.
3. Consider the future needs of your organization, contemplating not only what would be beneficial today, but also necessary in 3, 5, or 10 years from now.

In addition to this user-centered approach, assess the organization's readiness for a centralized tool. Investigate whether previous attempts have been made to use a centralized tool and, if so, what led to their failure. Were there bottlenecks? Detractors? Engage with individuals who were involved in those initiatives to understand the reasons for their failure. This will help anticipate potential roadblocks within the organization's internal processes and the organization's readiness for a centralized tool.

Decide Who To Engage

It's critical to understand the needs of staff at every level. Recognize that the requirements of a country director differ from those of a project-level administrator working in the field, and these vary substantially from the needs of a field worker. Consider not only the individual's team affiliation (e.g., M&E, IT, ICT4D, Program Delivery) but also their functional role within the project (e.g., worker monitoring, data analysis, operations) and the organizational level at which they operate (end-user, project-level, country-level, regional-level, or HQ). To encompass the full spectrum of needs, actively seek input from a diverse group of stakeholders.

Map Out What You Do Know and Don't Know

To begin, the task force should build a comprehensive understanding of the digital tools currently used across the organization. Online surveys are an easy way to collect feedback on the digital tools employees utilize and gauge satisfaction levels. This survey should ask questions encompassing the entire data lifecycle, including topics about the following:

Data Collection → **Analysis** → **Visualization** → **Mapping** → **Result Communication**

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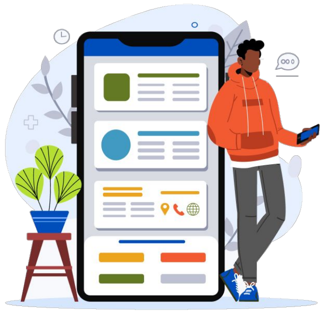


Most task forces also use the feedback to select a diverse group of users from various global offices to form a focus group or select individuals for interviews to develop deeper insights into their experiences.

These selected responses may represent a range of experiences, including technologically proficient individuals who frequently use digital tools and express satisfaction with them, as well as those with limited or unsatisfactory experiences.

By analyzing the results of your surveys, focus groups, and surveys, you'll be able to answer:

- What tools are program teams already using for data collection, visualization, analysis, and data communication?
- What are the training requirements for programs, M&E, IT, and ICT4D staff?
- What pain points and issues are associated with the current tools?
- What aspects of the existing system are functioning well and should be retained?
- What are the fundamental features necessary in a global tool that would support country offices and programs of all sizes?
- What would you need from a tool in the next 3 years?

Share Your Final Recommendation

With insights from the organization-wide survey and qualitative feedback from focus groups and interviews, create a final report to share with key decision-makers. This report should outline the pain points emphasized by users and offer well-considered recommendations for the way forward regarding tool selection. Additionally, the report should highlight intriguing findings, particularly those that are surprising and deviate from the expected or are particularly noteworthy. The format and size of the final report may vary based on the specific requirements of the organization, its internal policies, and the degree of enthusiasm for the idea of centralization.

The report should include a comprehensive list of requirements, developed in close collaboration with compliance, finance, IT, and procurement teams. Ensure that all identified needs from the initial assessment phase are included, as well as any requirements from other teams within the organization. This will help feed into the selection of future tools in the next stage of the centralization process.

“Our organization undertook a similar project...and estimated a total workload of approximately 200 hours with responsibilities such as **program oversight, meeting coordination, white paper drafting, and editing, as well as extensive discussions and interviews spanning 12 countries.**

This sounds like a lot of work, and it is.

But it's essential to invest the time to do this right because the opportunity cost was much higher.”

3 Select the Right Partner & Tool

With problems and requirements identified, the subsequent step involves selecting the right technology providers to partner with and establishing a contract that seamlessly caters to the needs of HQ, country, and project-level users. In selecting the right tool for your organization, make time to plan for the following steps:

Hold Discussions with Different Teams

Collaboration with the finance, compliance, programs, business development, and procurement teams is crucial to determining the procurement and billing process of a global tool. They can support the consideration of policies within the organization and evaluate how centralizing digital tools can either enhance compliance with these policies or potentially create obstacles. Some organizations opt to fund the tool centrally with non-restricted funding, while others choose to allocate the cost to program or country teams. Some classify the tool as an IT tool while others consider it part of M&E / MEAL expenses depending on compliance and finance policies. Aligning the centralization effort with organizational policies can ensure smoother operations and seamless integration of digital tools.

Identify Potential Technology Providers

The vendor should be more than just a technology provider. They should be a true partner, willing to guide the organization throughout the process of integrating their tools. Look for a vendor with extensive experience at the enterprise level and a commitment to success. The vendor should be dedicated to being a long-term partner, invested in meeting the organization's institutional needs.

The organization could engage potential vendors in three key ways:

Issue a Tender / RFP	The Request for Proposals (RFP) should meticulously outline the organization's requirements and request vendors to address each one comprehensively.
Hire a Consultant	This person will lead an evaluation of existing solutions and provide a final recommendation after extensive discussions with vendors.
Hold Interviews / Demos	The task force can request demos with vendors they are interested in working with. This demo is an opportunity to ask if their software meets the requirements (including budget) and compare offerings.

3 Select the Right Partner & Tool

Select your Tool

Making your final tool selection will feel like a big decision, with many inputs to consider. While you'll refer to the excellent research you've done to date to inform your decision, make sure to always have the bigger picture in mind: what are the main problem(s) that you and your team want to solve? We've put together some guidance below, aligned to the framework we shared earlier about the benefits of centralization.

The tool should be affordable and cost-efficient, particularly at scale.

Ensure that you understand the costs of both the core digital tool and supplementary expenses (e.g. data warehousing, integration with BI tools, self-hosting, etc). For support, check out Dimagi's [Total Cost of Ownership] model.

The tool should be publicly accessible and easy to start using.

Remember, you're selecting not only the technology but the entire support ecosystem. Review their support documentation - is it easy to follow? Submit a ticket to the support team to test their support quality.

The tool should cater to projects of all sizes and enable replicable use cases.

Any tool that you select should be able to scale as your projects grow, as well as be adapted for different use cases. For instance, can an app designed for community health workers in Ethiopia be localized in India? [Third-party evaluations] may be a helpful resource to consider.

Above all else, the tool must be secure.

Adherence to the most stringent data security and privacy standards is non-negotiable. The tool should be verified by third-party security standards, including HIPAA compliance, SOC2, or others.

“We selected a tool that worked for a global M&E survey, across country offices.

It allowed us to build the surveys ourselves rather than rely on a consultant, which had been significantly limiting.

Now the country offices are rolling out the platform on an as-needed basis, when they have demand, the tool is ready and the learning resources are there for them to build their own apps and surveys.”

4 Successfully Roll Out Your Tool

To successfully scale up the chosen tool internally, it is important to recognize that this process takes time and effort. Here are a few key steps that an organization can take to ensure a smooth and effective scale-up.

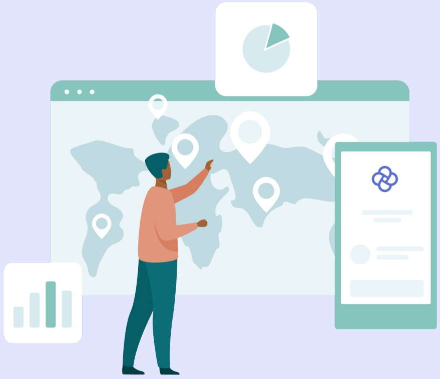
Considerations when Rolling Out Your Centralized Tool	
Appoint a Dedicated Owner	Designate a responsible individual within the organization as the primary point of contact for the service provider. This owner will serve as the internal liaison, fielding inquiries and concerns, and consolidating these comments to relay to the provider. This streamlines the engagement, preventing redundant queries and missed responses. There may also be a dedicated application owner in each country office or by project to ensure that there are localized resources where necessary.
Establish a Help Desk	It is critical to establish a structured feedback mechanism that allows users to connect with the organization's "application owner" to ask for help or give feedback. This could be facilitated through a dedicated Slack or Teams channel, an exclusive email account, or regular check-in calls. The "application owner" should have key performance indicators (KPIs) aligned with promptly responding to colleagues and addressing issues.
Announce the New Tool	Ensure that the entire organization is informed about the shift from a project-based approach to the globally procured tool. Share the advantages of the selected tool and provide a reasonable timeline for projects and country offices to transition from their current tools to the new ones.
Designate Country Onboardings	Collaborate with country and regional offices to ensure they understand the necessary processes for securing their accounts, how to pay or bill for the tool, and any restrictions on usage (number of accounts, forms, responses) that may impact the budget or usability.
Develop Guidance Materials	Materials - written, videos, interactive - need to be organization-specific - so they account for specific Standard Operating Procedures which could include data protection policies. These can be developed over time as the organization rolls out the adoption of the tool and incorporates more complex features.
Conduct Ongoing Trainings	These sessions are hosted by the "application owner" and may include the technology provider. People have different learning styles, so incorporate mediums including videos, webinars, documents, and in-person sessions where possible. Attendees should include product owners from country offices or projects, who will be responsible for cascading training to their respective team members.

"Previously, new programs would approach HQ's M&E team when they wanted to use a centrally procured data collection tool.

The M&E person at HQ would build the app / survey for each project and request, which became unsustainable. There was no capacity building for how to use the tool at the country level, and poor data practices were built which then took longer to break (excel exports, workarounds, etc).

We reversed this by hosting weekly (and now monthly) sessions and developed over 50 hours of training on how to use the platform. It took 2.5 years.

It's not just a system - it's a process - that is now saving time and leading to cleaner data."



Final Thoughts

Centralization: Significant Investment, Incredible Returns

There is no question that centralization is a time-intensive effort. It will require up front investment and time from across your organization to do it successfully. Yet while the initial period may take more time, it can have enormous, positive impacts on an organization, and save significant time down the road.

Although the steps outlined in this document may not be universally applicable to every organization, the general guidelines offer a foundational framework for an inclusive and thorough process of procuring a centralized digital tool.

Investing time in careful preparation and collaboration with your team from the outset will yield benefits in terms of efficiency, security, budgeting, and visibility. By involving global teams in the feedback, selection, and onboarding phases, you build their buy-in to the ultimately procured tool, transforming them into enthusiastic champions of its use.

Acknowledgements

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Explore both for a comprehensive understanding of centralized digital tool adoption. Additional contributors to this playbook are: Amy Smith, Senior Director of Partnerships and Erin Quinn, Senior Director of Customer Success at Dimagi, and Jamie Arkin, Consultant.

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Thank you for reading the Dimagi M&E Playbook!
For any questions or to speak to our team, please contact us **here**.