Connecting the Information Dots

A Webinar Series for International Not-For-Profit Organizations
## Webinar Series

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tues, Mar 11(^{th}) @ 11:30AM - 12:45PM EST</td>
<td>Knowledge Management / Content Management / Publishing and Workflow</td>
</tr>
<tr>
<td>Tues, Apr 8(^{th}) @ 11:30AM - 12:45PM EDT</td>
<td>Cloud Based Solutions For Better Managing Projects And Data In International Development – A DevResults Case Study</td>
</tr>
<tr>
<td>Tues, May 13(^{th}) @ 11:30AM - 12:45PM EDT</td>
<td>Best Of Breed: Bringing Together Financial, Grant, and Donor Management Systems</td>
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</table>
Questions

• Type your questions in the QUESTIONS box of the control panel. We’ll ask the presenters to respond to timely questions during their presentation. We’ll address the rest of the questions at the end of webinar.

• By default, your microphone is muted. Because we have so many attendees, we’ll keep everyone muted throughout the webinar.
Webinar Recording

• We’ll be recording the webinars in our series
• We’ll make these recordings available to those who attended the webinars first, and eventually to the general public
Today’s Webinar

Creating an M&E Custom Solution – a Case Study

Amy Vincus, Research and Evaluation/CRM Project Director, Ipas
Emily McMahon, Research and Evaluation/CRM Project Team Lead, Ipas
Eric Jones, Director of Information Systems, Ipas
Ashley Sorgi, Research and Evaluation Associate, Ipas

Moderators
William Lester, Executive Director, NPOKI
Igal Rabinovich, CEO, n-Village
Let’s Take a Quick Poll!

- We want to learn about your organization
- We want to learn about your use of Monitoring & Evaluation solutions
Microsoft CRM for Monitoring & Evaluation

Presented by:
Amy Vincus
Eric Jones
Emily McMahon
Ashley Sorgi

11 February 2014
Your hosts

Eric Jones
Director of Information Systems

Emily McMahon
R&E Advisor

Ashley Sorgi
R&E Associate

Amy Vincus
Senior R&E Advisor
Ipas’s organizational mission

• Global, non-profit reproductive health and rights organization
• Founded in 1973

• Mission:
  o To reduce abortion-related mortality and morbidity
  o To increase women’s ability to exercise their sexual and reproductive rights
Ipas’s program focus

- **Support advocacy** for safe abortion and reform of restrictive laws
- **Engage communities** to expand their knowledge of SRHR
- **Train** health care providers
- **Work with health systems** to improve quality of & expand access to comprehensive abortion care
  - Safe abortion
  - Treatment of abortion complications
  - Contraceptive counseling and method provision
- **Conduct research** on impact of unsafe abortion & **evaluate** effectiveness of interventions
- **Work to ensure young women’s** access to comprehensive abortion care
Ipas at a glance

• 15 country offices in Africa, Asia & Latin America

• HQ in Chapel Hill, NC

• Multi-disciplinary staff of 350+

• Strong on-the-ground presence, with country offices staffed by local experts

• Focus on capacity-building and sustainability
Today’s presentation

- Selection of CRM for Monitoring and Evaluation
- Demonstration
- CRM roll-out: design, implementation, and training
- Lessons learned
Limitations of former M&E system

- Global information coming from multiple parallel databases/spreadsheets
- Fragmented information for some program areas
- Data access limited to R&E staff
- Time lag in availability of usable data
- Limited ability to adapt to changing needs
- Lack of integration with other information systems
What motivated change in M&E?

- Need for more sophisticated information systems to improve:
  - Program management
  - Documentation & reporting
  - Organizational effectiveness

- Part of larger information systems’ upgrade

- Initial upgrades supported through grant
Terra’s Timeline


- Selection
- Design
- System Build
- System Testing
- Pilot
- Data Migration
- Report Development
- Implementation
- Training
Selection Process - 1 Year

- Contracted consulting firm:
  - Conducted audit of current systems & processes
  - Evaluated projected needs
  - Recommended software for new systems
    - Program monitoring & evaluation
    - Grant management
    - Financial accounting
    - Human & other resource management
    - Project management
LUNA = Collaboration Space and Document Management

Luna
(SharePoint)

Terra & Stella
(CRM)

Vega
(Agresso)

ERP = Financial and Resource Management

Terra = Indicator Monitoring and Reporting

Stella = Grant Management
Selection: Why CRM for Ipas

- Customizable design, easy to accommodate new needs
- Centralizes forms and processes used to collect data
- Backed by MS & community of developers, vendors, users
- Web-based interface, familiar to MS users
- Allows for offline use & mobile application
- Ability to integrate with other Ipas systems
### DEMONSTRATION

#### Microsoft Dynamics CRM

**Sites (Ipas): Demo View**

<table>
<thead>
<tr>
<th>Country</th>
<th>Site Type</th>
<th>Category (Site Type)</th>
<th>Is this an Ipas intervention site?</th>
<th>Year of First Ipas...</th>
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<tbody>
<tr>
<td>Pakistan</td>
<td>Tertiary Care Hospital</td>
<td>Tertiary</td>
<td>Yes</td>
<td>2013</td>
</tr>
<tr>
<td>Nepal</td>
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<td>Primary</td>
<td>Yes</td>
<td>2013</td>
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<td>Bangladesh</td>
<td>Medical College Hospital (MCH)</td>
<td>Tertiary</td>
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<td>2013</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>RHSTEP Clinic</td>
<td>Primary</td>
<td>Yes</td>
<td>2013</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>District Hospital (DH)</td>
<td>Secondary</td>
<td>Yes</td>
<td>2013</td>
</tr>
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<td>District Hospital (DH)</td>
<td>Secondary</td>
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<td>Secondary</td>
<td>Yes</td>
<td>2013</td>
</tr>
<tr>
<td>India</td>
<td>Community Health Center (CHC)/Rural Hospital</td>
<td>Primary</td>
<td>Yes</td>
<td>2013</td>
</tr>
<tr>
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<td>Yes</td>
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<td>Secondary</td>
<td>Yes</td>
<td>2013</td>
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<tr>
<td>Mexico</td>
<td>Hospital nacional/ estatal de tercer nivel</td>
<td>Tertiary</td>
<td>Yes</td>
<td>2013</td>
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<tr>
<td>Mexico</td>
<td>Hospital nacional/ estatal de segundo nivel</td>
<td>Tertiary</td>
<td>Yes</td>
<td>2013</td>
</tr>
<tr>
<td>Zambia</td>
<td>Health Center (Rural or Urban)</td>
<td>Secondary</td>
<td>Yes</td>
<td>2013</td>
</tr>
<tr>
<td>India</td>
<td>Community Health Center (CHC)/Rural Hospital</td>
<td>Primary</td>
<td>Yes</td>
<td>2013</td>
</tr>
<tr>
<td>India</td>
<td>Individual Private Doctor's Clinic</td>
<td>Primary</td>
<td>Yes</td>
<td>2013</td>
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<tr>
<td>Zambia</td>
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<td>Secondary</td>
<td>Yes</td>
<td>2013</td>
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<tr>
<td>Zambia</td>
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<td>Primary</td>
<td>Yes</td>
<td>2013</td>
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<tr>
<td>India</td>
<td>Community Health Center (CHC)/Rural Hospital</td>
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<td>Yes</td>
<td>2013</td>
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<tr>
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<td>Sub-District Hospital (SDH)</td>
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<td>Primary Health Center (PHC)/Clinic</td>
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1 - 250 of 1868 (0 selected)
Terra’s Timeline

Jan - Dec 2011

Selection

Jan – Jun 2012

Design

July – Dec 2012

System Build

System Testing

Pilot

Jan – Jun 2013

Data Migration

July – Dec 2013

Report Development

Jan – Jun 2014

Implementation

July – Dec 2013

Training

Jan – Jun 2014
Design

- Consulting firm created “Functional Requirements” to guide build of our CRM
  - Developed over 6-month period
  - Held iterative rounds of meetings with Ipas technical staff & CRM project director
  - Foundation of CRM was organizational indicators & grant reporting needs
Design

- Internal project oversight strengthened:
  - Deputy project manager hired
  - Decision-making Advisory Board created, made up of directors of technical & programmatic units
  - Executive sponsor of project identified
Design - Lessons Learned

How CRM works

How we work
Design - Lessons Learned

Security roles
• requires customization
• time-intensive
# D. Contraceptive Supply & Provision

**D1.** Does this facility offer emergency contraception?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

**D2a.** Is there a supply of emergency contraception available on site today?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

**D2b.** Has there been a stock out of emergency contraception during the past three months?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Never stock</th>
</tr>
</thead>
</table>

**D3a.** Is there a supply of condoms available on site today?

<table>
<thead>
<tr>
<th>Yes</th>
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</thead>
</table>

**D3b.** Has there been a stock out of condoms during the past three months?

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</tr>
</thead>
</table>

**D4a.** Is there a supply of oral contraceptives available on site today?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

**D4b.** Has there been a stock out of oral contraceptives during the past three months?

<table>
<thead>
<tr>
<th>Yes</th>
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</tr>
</thead>
</table>

**D2b. - D7b. Has there been a stock out of these methods during the past 3 months?**

**D2b.** Has there been a stock out of emergency contraception during the past three months? *

<table>
<thead>
<tr>
<th>Yes</th>
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**D3b.** Has there been a stock out of condoms during the past three months? *

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</table>

**D4b.** Has there been a stock out of oral contraceptives during the past three months? *

<table>
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</thead>
</table>
System Build - Lesson Learned

- Finalize content/layout of all forms before building

- User testing is for functionality, not content of the form
Terra’s Timeline

- Jan - Dec 2011: Selection
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- July - Dec 2013: Report Development
- Jan - Jun 2014: Implementation
- Jan - Jun 2014: Training
System Testing

- 4 releases and 3 testing periods
- Pre-written scripts for testers
- Processed about 1,000 unique comments

User Acceptance Testing (UAT): HS-Script 5

<table>
<thead>
<tr>
<th>Task Type:</th>
<th>Entering a Provider Baseline</th>
</tr>
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<tbody>
<tr>
<td>Due Date:</td>
<td>9/21/2012</td>
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<tr>
<td>Estimated Time:</td>
<td>15 Minutes</td>
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Description of task:
Entering a new provider baseline into Terra would occur after a provider has been trained. This script describes how to enter a new provider baseline and link it to a provider record in Terra. After following the instructions below, please complete a UAT results form in Terra (instructions also below).

Key Words:
- Ribbon
- Left Navigation

Task Instructions:
1. All testers must be using an IPAS computer and Internet Explorer as the web browser.
Pilot

• Six-month pilot phase with four “early user” countries, one in each of Ipas’ regions
Pilot - Lessons Learned

• Pilot the training
  o Discovered the need for more hands-on learning; developed a case study model

• Pilot the system
  o Made critical adjustments to data collection tools
Terra’s Timeline

Selection |
Design |
System Build |
System Testing |
Pilot |
Data Migration |
Report Development |
Implementation |
Training
Data Migration

- Validated exact record counts & variable mapping
- Checked all counts and validated the migration of over 1,500 columns of data
- 500,000 unique pieces of data from 30 tables
Data Migration - Lesson Learned

- Took **10 times** longer than expected

- Why?
  - Parallel systems running
  - Iterative review process
Terra’s Timeline

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- Training
Each color is a different donor
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- **Jan – Jun 2014**
  - Report Development
  - Implementation
  - Training
Implementation

Staggered Rollout

- Pilot in 4 countries
- Trained by region
- Data entry began after regional training completed
- 1 July 2013: universal use of new data collection tools
Terra’s Superusers: Terratories

• One per unit in HQ

• One per country team
Training Design

• No more than 16 participants per training
• At least 3 trainers so presentations were “fresh”
• In-person, face-to-face (an aspect we evaluated)
• Trainings held off-site
• Internet connection key
Quality Materials

- Invested in training materials
Case Study Model

• Build skills via applied learning and practice
“Step-down” Trainings

- Post-training support
  - Staff applied learning in “home” environments
  - Additional staff trained in country
Total number of training participants = 180

Number of Terra Trainings
(n=12)
Lessons Learned: New M&E system imbedded in organizational change

- Build enthusiasm from day 1, but manage expectations
- Strong support from top leadership
- Regular, frequent communication w/ organization
  - Monthly regional calls w/staff
  - Task teams for revisions of existing tools
  - Regular meetings of Advisory Group
  - Updates to Executive Team
Lessons Learned: **Consultants as partners**

- Firm with global NGO experience preferred
- Build time to understand each others’ expertise, work style, & expectations
- Regular, frequent communication a must, including in-person
- Anticipate that process will be hard: change management at work
Lessons Learned: In-house team

- Need for staff with relevant skills: M&E, data management, IT & project management
  - Staff has developed new capacity during project

- Plan for sufficient, dedicated staff time

- Anticipate staff time needed after system launch
Lessons learned: Resource planning

• Plan for multi-year budget
• “Hard” costs include:
  ▫ Consulting firms for design, build, test & implementation
  ▫ User licenses
  ▫ Any needed system add-ins (e.g., date conversion)
  ▫ Future version upgrades
  ▫ Staff time
• “Soft” costs include:
  ▫ Staff training & materials
  ▫ Post-training support to countries
  ▫ Continuing education for staff
Benefits of Terra

As our new M&E system, Terra provides:

• A single source of “truth” for all of our M&E data
• “Real time” data for all of our work as soon as data are entered
• Democratization of data: access to more data for more staff
• Improved management and reporting processes
• Easily-accessible data via dashboards and prepared reports
• Stringent security and protection for data
It takes a village

Acknowledgements

• Our Terra teammate who didn’t present today: Achieng Ajode

• Our colleagues who tested, joined calls, attended training, agreed to be Terratories

• TAG members for their guidance

• Our Executive Team for their support, sponsorship

• Our donors who funded this project
Q & A
### Contact Information:

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amy Vincus</td>
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<td></td>
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