The webinar will start soon...

Monitoring & Evaluation Webinar Series is brought to you by:

InsideNGO
Operational Excellence for Global Impact

VEGA
Volunteers for Economic Growth Alliance
Today’s Webinar

**ICT for M&E – Enterprise Systems**

May 12, 2015

Presented in Partnership with

Connecting the Information Dots
Poll 1:

What type of organization do you work for? (choose one)

- International not-for-profit or non-governmental org
- International for-profit company
- Consulting company/contractor/self-employed
- Academia
- Other
Poll 2:

How does your organization currently manage M&E data? (Choose all that apply)

- We use Salesforce to manage data
- We use Sharepoint to manage data
- We use an off-the-shelf application to manage data
- We use a custom application to manage data
- We use Word/Excel/Acess to manage data
Today’s presenters

Bill Lester
Executive Director,
NPOKI

Barbara Willett
Director - Monitoring, Evaluation and Learning,
Mercy Corps

Nicola Hobby
Director of Strategic Partnerships and Business Development,
BAO Systems
To Buy/Build or Not To Buy/Build, That is the Question…

Tuesday, May 12, 2015

Bill Lester – Executive Director

Better Performance • Better Nonprofits
Agenda

Criteria/Filter
Buy Pros/Cons
Build Pros/Cons
Hybrid Model
Final thoughts
Questions

Better Performance • Better Nonprofits
What is an “enterprise system”?

An **Enterprise System** is a large-scale application software package that supports business processes, information flows, reporting, and data analytics across an organization. It is applicable to all projects/programs/divisions. It is meant to replace one-off or shadow systems.

Examples:
- Customer Relationship Management
- Supply Chain Management
- Enterprise Resource Planning
Unique Criteria/Filters

- M & E Enterprise System
- NonProfit Organization
- Low Resource Areas
- Lack of Competitive Advantage
Buying a Commercial, Off-the-Shelf Solution

Pros

- Often meets the majority of your needs out of the box
- Relatively fast deployment
- Software development is core competency of vendor

Cons

- Likely chance that features or functionality are missing or not optimal
- Fixes and enhancements delivered on a regular basis
- Vendor may not know enough about your core business to develop a specific application
Buying a Commercial, Off-the-Shelf Solution 2

Pros

- Leverage a large customer/user base to drive enhancements
- Vendors offer flexible software licensing models

Cons

- Higher upfront cost to purchase application, annual fees
- Licensing may not offer the model you want (perpetual, per user, per site, modular, SaaS)
Buy Considerations

- The product should meet 80% to 90% of your requirements “out-of-the-box” – no additional work required.
- The product should hold your information in a generic file format (not a proprietary file type!)
- What is the longevity of the “buy” product (think of Blackbaud)?
- Verify that the software is real (not just vaporware)
Buy Examples

Taroworks
Systmapp
Fluxx
DevResults

Better Performance • Better Nonprofits
Building a Custom Solution

Pros
- Glove fit for your specific needs
- Lower upfront cost
- Local Support
- Immediate fixes, enhancements
- Investment in updates and enhancements controlled

Cons
- Changes to the solution are generally costly
- Design, develop, deploy and train is expensive
- No knowledge base
- Resources may not be available
- Forward compatibility of customizations are challenging
Building a Custom Solution 2

Pros

- A uniquely developed solution can provide a competitive advantage
- Can be designed to support legacy systems

Cons

- Which projects pay for software development and ongoing support
- Difficulties in supporting new technology platforms on the horizon
Build Considerations

- Is Software Development in your mission?
- Consider sustainability – will you develop in-house capacity? Or work with consultants?
- What resources do you have?
- Think about how the environment will change – both staff (staff-turnover) and software (will the software still be supported in 3-5-1-years)
- Why reinvent the wheel?
Build Example

Sharepoint
Salesforce
CRM

Creating an M&E Custom Solution – an Ipas Case Study: [https://goo.gl/qCVmA3](https://goo.gl/qCVmA3)
Hybrid Solution

- Can be open source
- Can be collaborative
- Think about who will do the customization – will you use in-house resources or work with consultants?
Hybrid Examples

DHIS2

Odoo

Better Performance • Better Nonprofits
Conclusions

- Look at your organization’s level of risk tolerance
- Look at your organization’s ability to buy off-the-shelf software
- Look at your organization’s ability to support a custom application solution
- Consider the people (resources), processes (workflows) and systems (tools) needed
- Consider the time and the money
To Buy/Build or Not To Buy/Build, That is the Question…

Tuesday, May 12, 2015

Bill Lester – Executive Director
Adventures in
Agency Measurement Systems

The Mercy Corps Experience
The Legend of Mission Metrics

Alleviate suffering, poverty and oppression by helping people build secure, productive and just communities.
MISSION METRICS FRAMEWORK

MISSION STATEMENT: Mercy Corps exists to alleviate suffering, poverty and oppression by helping people build sustainable, just communities.

Definitions of Key Terms from Mission Statement

- **Suffering**: occurs when people experience, or are at risk of danger, fear, loss and/or pain.
- **Poverty**: is the inability to meet basic needs.
- **Oppression**: is the denial of people’s human rights by those in power.

Themes

- **Secure communities** are those where people are free from danger, fear, loss and/or pain.
- **Productive communities** yield social and economic benefits for all.
- **Just communities** enable participation of all their people in decisions that affect their lives, enabling them to hold their leaders and institutions accountable.

Indicators

1. **Basic needs** are met after loss occurring events. (Basic Needs)
   - 1.1 Number of people receiving emergency relief services
   - 1.2 Number of households or individuals receiving emergency relief services showing change in assessed conditions
   - 1.3 Number or percentage of programs implementing emergency relief services that have elements of recovery programming within 90 days of the initial response

2. **Communities are organized, informed, and resilient to destabilizing events**. (Community Resilience)
   - 2.1 Mechanisms to prepare for or manage destabilizing events or disasters are established or improved
   - 2.2 Number and percentage of communities that show reduced vulnerability to destabilizing events or disasters

3. **Communities have access to basic information, infrastructure, and services needed for people to be healthy**. (Healthy Communities)
   - 3.1 Number and percentage of communities with improved access to basic information, infrastructure, and/or services for people to be healthy
   - 3.2 Individuals, groups, or communities with improved health and/or health-related knowledge/attitudes/practices

4. **People are able to support themselves and their families, and thrive**. (People Thriving)
   - 4.1 Number and percentage of households reporting greater prosperity

5. **Communities are able to lead development for their own social and economic well-being**. (Community-led Development)
   - 5.1 Number and percentage of communities engaged in collective community action
   - 5.2 Local partner organizations with increased capacity to address community needs

6. **Active private sector and inclusive markets** (supported by economic infrastructure) generate increased incomes for the poor. (Improved Markets)
   - 6.1 Improvements to market systems
   - 6.2 Number of jobs created

7. **Effective participation of marginalized groups in public life**. (Participation of Marginalized Groups)
   - 7.1 Increased knowledge and skills among marginalized populations
   - 7.2 Marginalized populations play a role in community decision-making

8. **Government, civil society, informed citizens, and private sectors successfully interact together**. (Sectors Interacting)
   - 8.1 Linkages between private sector, government, and civil society are forged and/or improved

9. **Existence and use of local, regional and/or international processes for peaceful change**. (Peaceful Change)
   - 9.1 Improvements in peace and security
   - 9.2 Mechanisms to manage conflict are established or strengthened
   - 9.3 Relationships between groups with a history of tension are improved

10. **Accountable and capable governance at local, sub-regional, or national levels**. (Accountable Governance)
    - 10.1 Number and percentage of communities with increased capacity to engage with government
    - 10.2 Government responsiveness and accountability improved at local, sub-regional, and national levels
Legend...Interrupted

Why?

Short answer: Too much work for too little return – didn’t produce results that were useful.

Long answer:
• Mission focus was too abstract
• Incomplete dataset (outcomes only)
• Process was complicated and time-consuming
“It’s NOT my data!!!”
The Legend Continues

- Started fresh with **specific** and reasonable **information requirements**, with clear **owners**

- Designed framework for an agency system that is **field-first** (universal, online indicator planning/tracking system – for **program management**)

- Also worked on sector-specific **Theories of Change** and **standard indicators** – second tier use of system – tracking and analyzing results by sector
Technology Journey

- Extensive collection of requirements
- Review of off-the-shelf systems
- Pilot test of one off-the-shelf system
- Extended solicitation for custom-build (hybrid)
  - Open-source, co-build with internal IT staff
- Chose vendor, but funding is currently stalled
- Field isn’t waiting!
  - Need to align agency vision with field initiatives to create a flexible, user-focused, field-driven data and information environment
YOU HAVEN'T HEARD WHAT THE PROBLEM IS YET; HOW CAN YOU RECOMMEND BUILDING A DATABASE TO SOLVE IT??

WE ALWAYS BUILD A DATABASE.

AND WELL NEED COFFEE MUGS FOR THE PROJECT TEAM.

THE PROBLEM IS THAT WE HAVE POOR PROCESSES.

THAT COULD BE THE SLOGAN ON OUR MUGS!
and they lived happily ever after
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<th><strong>Still want more?</strong></th>
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<td>Focus early and often on use – what questions do you want to answer and who will listen/act? Is this about PR or improvement?</td>
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<td>Think hard about what it will take and what you will give up to make it happen – consider organizational culture – does it fit?</td>
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<td>Link closely to program M&amp;E processes but limit extra data or work – put what you can on the front-end, even if it’s cost-loaded</td>
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<td>Allocate quality IT and data management systems – invest more up front to avoid re-building and ongoing maintenance later</td>
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<td>Limit expectations as you go – can’t be all things to all people, but they will still expect it – keep reminding them</td>
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<td>Be super careful about terminology – how to use ‘impact’; agency-level systems versus agency-level results</td>
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<td>Keep track of the successes and examples of how it is used – you will be asked to explain and justify again and again</td>
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<td>Give it time – it may take up to 10 years to develop and fully embed - will your organization have that patience?</td>
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DHIS 2 for NGOs

Nicola Hobby May 2015
What is DHIS 2?
District Health Information System version 2.0

- An innovative, highly flexible web-based open source software for reporting, analysis and dissemination of data
- 3 Data Models: Aggregate, Event and Tracker
- Variety of offline and mobile data capture options
International Non-Profits and Development Agencies using DHIS 2

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Last Updated: May 2015
Key Features

• Web-based configuration – No coding or development!
• Web-based and offline data capture (SMS, PDF, Android Mobile, Data Imports)
• Data Exchange through flexible API
• Granular configuration allows for a variety of user roles and rights
• Social Analytics allow users to share information through user groups and in-built messaging application
• Apps – extend DHIS 2 for specific use cases not supported by core
• Scalable – from local to global
Dashboards
Why does it work for NGOs?

- Open-source – You own it!
- Generic – Not just for health!
- Designed for the developing world
- Easily scalable
- Global community ensures sustainability
- Provides instant access to information in ways that many people have not experiences before…
Want to know more?

• [www.dhis2.org](http://www.dhis2.org)

• Check out the demo: [https://apps.dhis2.org/demo](https://apps.dhis2.org/demo)
  • Login: admin / Password: district

• Fundamentals of DHIS 2 for NGO’s Training – May 18 – 20, 2015 in DC
  • [http://baodhis2.eventzilla.net](http://baodhis2.eventzilla.net)

• Join us for a LIVE demo and Q&A session May 21st 10AM EST
  • Webinar info to be sent to participants

• Email the BAO Team with specific questions about your project
  • [nhobby@baosystems.com](mailto:nhobby@baosystems.com)
Thank You

For more information please visit the following websites:

VEGA – www.vegaalliance.org

InsideNGO – www.insidengo.org

(Links in PowerPoint slides will be sent to attendees in an email after the webinar.)