

How to
GET READY FOR
Continuous Outcome
Monitoring



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Introduction



In 2020, an organization claiming to make a difference is not good enough; evidence of how much difference it is making is a new normal. As "Measuring impact" is becoming a mantra for creating social change, it is not limited to mission-driven organizations alone. How to measure long-term impact on society and feed the knowledge gained back into the system to fuel data-driven decision-making? Traditional Monitoring and Evolution has its place, but the modern monitoring method is continuous outcome learning.

This guide aims to prepare an organization for gathering requirements for starting the Continuous Outcome Monitoring. Where do you start and get ready to implement the system effectively? The process begins with a firm understanding of the project theory and a sound, comprehensive implementation with reliable and outcomes learning data.

How can you bring learning to planning?

Learning is taking the information and insights acquired to make critical strategic decisions. These informed decisions can be at a management level or a program design level. The point is to use the data and results obtained from analyses to breed accountability into an organization's activities and also into the M&E process itself. Learning should be continuous and embed performance improvement into management and staff. It recognizes that programs need to be able to respond to the dynamic nature of impact-seeking activities.

By applying data-driven insights at various intervals, an organization can better achieve the outcomes it seeks for its beneficiaries.

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Know Your Stakeholders

01

Who cares whether a healthcare project in Kenya meets its stated objectives? Who finds it essential that funds allocated for education in Haiti are spent effectively? Who stays up at night hoping that the school in the village will stay open so that her daughter can go to school next year? These people, or groups of people, are often called project “stakeholders.” It is vital to engage them right from the beginning. It is important to them that a project succeeds.

Identify and list your stakeholders. Example stakeholders are,

- Program Beneficiaries
- Impact Investors, Donors, Funders, Foundations, etc
- Employees, Volunteers
- Community members
- Students

What is stakeholder engagement?

Stakeholder engagement is the process by which an organization involves people who may be affected by the decisions it makes or by its implementation.

7 Benefits of Effective Stakeholder Engagement

- Learning about the change
- Effective decision-making
- Saving time and money
- Building Trust
- Risk management
- Improved Accountability
- Understand needs



Choosing Framework

02

What frameworks do you follow or are interested in following?

Theory of Change or Logic model:

Useful in reporting Activity, Output, and Outcome data

Theory of Change (ToC) explains your organization's intended path to impact by outlining causal linkages in an initiative (i.e., its shorter-term, intermediate, and longer-term outcomes). By exploring the theory of change, we clarify the underlying assumptions and know what supporting evidence to seek at each stage confirms that the project is on track to deliver the intended impact.

Impact Management Project:

Useful in learning stakeholder's voice.

IMP is a forum for building global consensus on how to measure and manage impacts. According to Impact Management Project, the impact can be measured across five dimensions WHAT, WHO, HOW MUCH, CONTRIBUTION, and RISK.

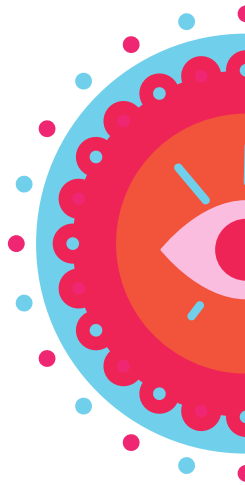
Purpose PlayBook:

Useful for corporates in aligning with Shared Value principles

The Purpose Playbook can help companies better understand what it means to have a purpose-led organization, what makes a purpose worth having, and how to deliver on the promise of that purpose by focusing on shared value.

Custom Key Performance Indicators

When an organization is not familiar with any framework, it can have a proprietary framework with custom Key Targets.



An indicator is a metric used to measure some aspect of a program. In the planning stages, the organization selects the indicators for monitoring the entire project. These indicators enable organizations to truly measure the extent to which they think or want change to happen. Indicators can be quantitative and qualitative, depending on what needs to be measured and in what ways.

Standard Metrics

Impact-oriented organizations use either standard metrics or custom metrics to track change. Standard metrics generally established by research institutes. They tend to be categorized around thematic areas or organization type. Examples of standard metrics include IRIS, GRI, CDP, BOND, GuideStar, Robin Hood, UN SDG, etc. Use standard metrics for external reporting.

Custom Metrics

Custom metrics are created by an organization to be more relevant to their particular context and intervention. Often internal, operational, or unique metrics not covered by standard metrics.

SDG Alignments

Sustainable Development Goals are a collection of 17 global goals set by the UN, starting in 2015. Sustainable Development that includes 17 Sustainable Development Goals (SDGs).

How do I know which standards to align when selecting metrics? Standard metrics are used by specific sectors or types of stakeholders: sustainability-focused, impact investing focused, community development focused, etc. For example, IRIS metrics are designed to measure an investment's social, environmental, and financial performance.



There are three stages of data management for the impact management:

Collect, Get Impact Insight, & Communicate

To access the scope of data collection, a fundamental question to ask is,

- Does your organization collect field data? Also called primary data or stakeholder data.
- Collect summary data (Metrics Data, or Aggregated Data, or Result Data)

Stakeholder data

Individual stakeholder data is the type of data that is collected directly from the end beneficiaries after an organization provides a service or product to these beneficiaries. Stakeholder data measures how they benefited from these actions.

- Collected on the ground and are granular at the client/beneficiary level
- Observed or collected directly from the first-hand experience
- Example, Employees, Volunteers, Supply Chains, Constituents, etc

Metrics Data: Aggregated results

On the other hand, high-level aggregate metrics are data collected from the impact manager's side. These metrics are those that are defined in the Theory of Change and collected from investees or grantees. These metrics, summaries, or results data aggregate the results from each organization (i.e., from the individual stakeholder data). Some examples of this data include environmental metrics, financial performance, and more.

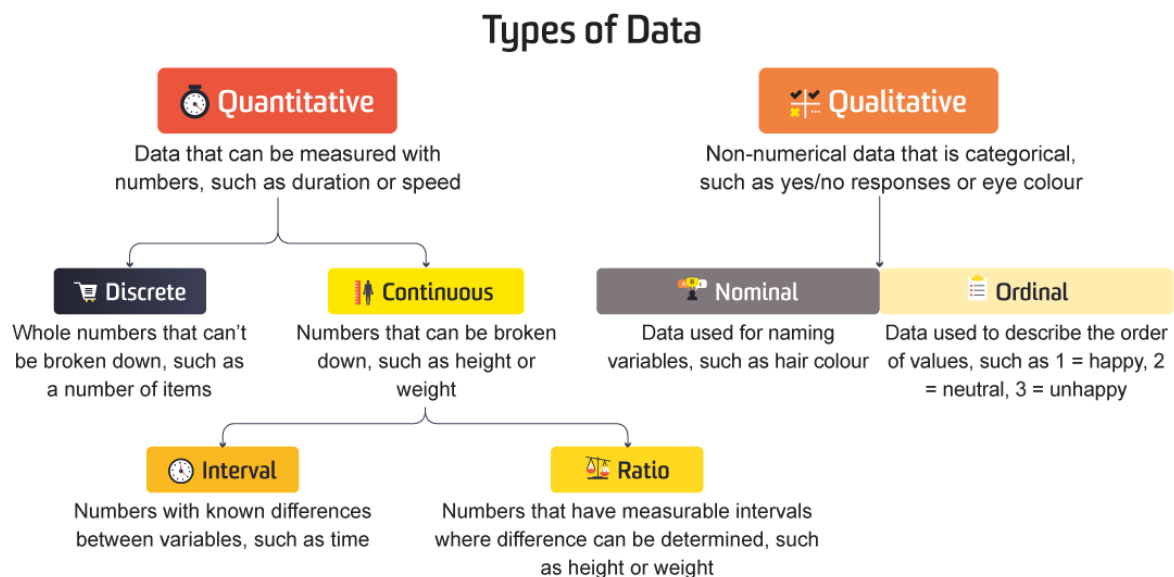
- Generated by compiling stakeholder data
- It is a summary evaluation of a program or an initiative.
- For example, student attendance data begin at the classroom level and then gathered at the school, district, state, and country level.

What kind of data do you collect?

The data is a valuable asset – so much so that it's the world's most valuable resource. That makes understanding the different types of data more important than ever. What is data? In short, it's a collection of measurements or observations, divided into two different types:

Qualitative data refers to information about qualities or information that cannot be measured. It's usually descriptive and textual.

Quantitative data is numerical. It defines the countable information.



Info-graph credit: <https://studyonline.unsw.edu.au/blog/types-of-data>

Some of data type you may be collecting

- Financial / Loan data
- Beneficiary demographics
- Volunteer, Beneficiary Feedbacks
- Beneficiary surveys (Longitudinal Data Analysis)
- Operational data (i.e., Water, Waste, Renewable, Energy, etc.)
- Program data (Training, Enrollment, Job creation)

How to reach out to your Stakeholders?

Data collection tools help you understand the organization's stakeholders better by collecting their feedback, opinion, and choices. The success of learning depends on the accuracy of the data collected. There are multiple data collection tools available in the market. Choosing the right one depends on your requirements. Some of the most commonly used data collection methods are,

In-Person Interviews

Pros: In-depth and a high degree of confidence in the data

Cons: Time consuming, expensive, and can be dismissed as anecdotal

Mail Surveys

Pros: Can reach anyone and everyone - no barrier

Cons: Expensive, data collection errors, and lag time

Phone Surveys

Pros: High degree of confidence in the data, reach almost anyone

Cons: Expensive, cannot self-administer, need to hire an agency

Web/Online Surveys

Pros: Cheap, can self-administer, very low probability of data errors

Cons: Not all your customers might have an email address/be on the internet; customers may be wary of divulging information online

Offline Data

There are offline data collection apps where forms are created online and can be filled without internet access. When you return to areas with internet access, the records sync with the online database.

Pros: Data security, saves time & resources, continuous data collection

Cons: Training, mobile devices, and services cost.



What is the right frequency?

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Data Collection Frequency refers to the data collection at regular intervals. It depends on the nature of programs and reporting requirements. What is the right frequency to collect data? It is different for every project.

- Will you collect data after having reached a milestone or specific activity?
- Are you sure about what you seek to find out and which data will help you retrieve this information (and which will not)?

At the level of Activities and Outputs: The data should be regularly collected (weekly, monthly, or quarterly, depending on needs) as a part of the monitoring process to implement swift interventions and countermeasures.

At the level of results (Outcomes and Impacts): The data collected here is generally more complex than is true of the outputs. Thus, it is analyzed less frequently. However, even at this level, some information is relatively easy to collect regularly, such as changes in students' grades.

Post evaluation takes place sometime after the project's completion.

Ad hoc evaluation is needed when monitoring data shows significant deviations from your plan.

Example Data Collection Tools

Offline

- Kobotoolbox
- Survey CTO
- CommCare
- Paper

Online

- Survey Monkey
- Qualtrics
- Google forms or XLS
- Paper

Data from Operational Systems

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Are you using any CRM (customer relationship management), Financial Portfolio, Donation, Loan, or Grant Management systems?

- CRM: Customer Relationship Management systems**

Are you using systems such as Salesforce, NetSuite, HubSpot, PipeDrive as your CRM?

 - How often will you need to use the data from the systems or platforms?
 - Do you need a constant stream of data?
 - Do you only bring the latest data from time to time?

- Financial Portfolio Management**

How relevant is this system data in your Impact Measurement or M&E process?

 - This data feeds into the outcome metrics
 - This data is part of the impact report or decision making
 - This data supports our reports, but it's not core to Impact Measurement or M&E

- Grant or Donation Management**

Are you a philanthropic organization and are using a grant management system? What data do you need from it?

 - Outcome metrics data
 - Data is part of the reporting to donors/funders
 - This data supports our reports, but it's not core to Impact Measurement or M&E

Continuous Outcome Monitoring

09

Starting with impact strategy and selecting relevant metrics before collecting and aggregating data augment decisions-making capacity. As per data science, analytics can be Descriptive, Predictive & Prescriptive.

Planning analytics: **What is our plan?**

Descriptive analytics: **What happened?**

Diagnostic analytics: **Why did it happen?**

Predictive analytics: **What will happen next?**

Prescriptive analytics: **What can we do about it?**

Although predictive and prescriptive analytics highlight today's headlines, without solutions to answer "what happened?" it is impossible to proceed. What might happen next and what to do about it depend on what happened.

Moving from Impact Reporting to Impact Insight

Effective impact reporting is a cyclical process that involves many stakeholders. The ideal impact report takes the reader (i.e., stakeholder) through the methods used to achieve the impact as well as actionable impact insight. Evaluation can be meaningful, but it is connecting dots backward. It is an afterthought.

Get ready to take a step forward with Continuous Monitoring.

- Avoid the complexity of using multiple versions of spreadsheets to learn insight.
- Save time and learn performance variance in real time of the program cycle.
- Do not miss the opportunity for course-correction to save resources.

Thank you

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