

ALNAP Skills Building Days 2018

Getting to Better Qualitative Monitoring | Session Notes

Session Summary Note Sheet

This Summary Note Sheet provides a summary of the key learning points from the session on qualitative monitoring good practices at the ALNAP Skills-Building Days, on 4-5 June 2018. It also outlines how you can get involved in the upcoming ALNAP research project on how to improve the capture and use of qualitative monitoring.

How to get involved

ALNAP recently produced a scoping paper *What is Monitoring in Humanitarian Action?* (Warner, 2017) which identified specific issues hindering the quality and use of monitoring information. To follow-up on the scoping paper, ALNAP will be examining in more depth issues around the capture and uptake of qualitative data specifically. As a first step, one of the sessions at the Skills-Building Day looked at how to get better qualitative monitoring. By bringing together practitioners from across the ALNAP Membership, ALNAP hoped to be able to better understand some of the root causes to challenges faced in the capture or use of qualitative monitoring data by humanitarian practitioners.

Throughout the next stages of the research project, ALNAP would like to actively involve the Membership. If you are interested in participating as an interviewee or reviewer, ALNAP would love to hear from you. In particular, ALNAP is looking to create a reference group for the design and implementation of the research. The reference group would provide inputs on the final research question, lead on what type of deliverable would be most appropriate, proposals on the way forward for the project and act as key advisors on the topic.

If you would like to get involved or if you have any questions, please don't hesitate to get in touch with Amelie Sundberg at a.sundberg@alnap.org.

The deadline for expressing interest in the reference group is the Friday 14 September.

Key learnings from the workshop

Although a clear definition on what constitutes 'qualitative monitoring' will need some further clarification as part of the research project, the Skills-Building session identified a few key areas that practitioners consider to be key challenges to collecting and using qualitative data effectively.

- **A lack of technical capacity from the bottom up:** data collectors struggle to facilitate interviews and focus groups well, and notes are often written in poor language and with limited detail. In particular, participants expressed that few data collectors have the skill to capture the nuance of behaviour and communication in interviews. As a result, the data is often difficult to analyse and triangulate. Many of those responsible for analysis also have limited experience in different analytical methods (often limited to key informants and focus group discussions) and struggle to aggregate qualitative data.
- **Information is treated as anecdotal:** in part due to the lack of thorough data collection, information from qualitative sources often becomes anecdotal and is used mainly for case studies or communicating success stories. Many agencies struggle to compare qualitative data between programs and countries.
- **Monitoring frameworks favour quantitative data collection:** most monitoring frameworks used by donors and agencies apply indicators that rely on quantitative data collection methods. As monitoring systems often prioritise donor reporting, the incentive to collect qualitative data is minimised.
- **Resources – especially time – are hard to come by in humanitarian contexts:** the large amount of time required to conduct data collection, transcription, processing and analysis of qualitative data ensures that many actors prefer to use 'easy' options such as surveys which they interpret in quantitative form.
- **A lack of trust:** many participants emphasised that colleagues in other departments do not trust qualitative data in reports and learning workshops to the same extent as quantitative data. Without the authoritative push from more senior members of staff, the incentive to collect qualitative data falls.

Qualitative monitoring practice examples

A number of the Skills-Building Days participants contributed their qualitative monitoring approaches, methods and tools as examples to be discussed during the session. The aim of this session was to share experiences in such a way that participants could follow-up on these conversations later. The examples are shared together with workshop discussion notes in the document attached with this email. An overarching list of the examples is also provided here:

- **CAFOD: Humanitarian Capacity Strengthening Framework**
This tool, used in a participatory way as a baseline and endline, is a way of self-assessing change in organisational capacity for humanitarian response. The performance of the organisation in each competency domain is measured against a set of indicators, with the help of guiding questions and examples of evidence to attribute a score for each indicator according to a level of achievement.
- **Christian Aid: Truth Truck**
This tool is a mobile recording studio to gather qualitative data which has allowed beneficiaries to comment on aid received and feedback on the project and future improvements.
- **Australian Government Department of Foreign Affairs and Trade: Annual Humanitarian Response Aid Quality Checks**
This tool of HAQC checks contributes to the improvement of program quality by triggering an annual exchange between investment managers, senior management team and other colleagues. Action plans are included in the same document in response to identified issues, and progress against these is recorded in future HAQC reports.
- **DFID: Performance Effectiveness Tracker**
This tool involves light touch performance assessment of all partners with a series of core (18) and additional voluntary (10) questions, based around issues of timeliness, quality and cost, and are cross referenced with the core humanitarian standards (CHS) indicators. This tool allows DFID for the first time to collate and assess qualitative outcomes of humanitarian partner performance, obtain longitudinal assessments of trends, undertake comparative analysis between partners and developing a database of impact and performance against a uniform set of criteria taking on board Grand Bargain and Core Humanitarian Standards (CHS) deliverables.

- **FAO: Programme Planning, Implementation, Reporting and Evaluation Support System**

This is an intranet based system: country, and regional and headquarter officers annually report the main results achieved into a joint system. They are requested to reply to a questionnaire on result reached, enter a narrative providing more details on results reached and link to evidence (report, publication, etc.) in order to substantiate the achievement.
- **Ground Truth Solutions: User Journey Mapping**

The approach includes in-depth interviews with clients and thinking creatively about how to use the right questions to provoke more questions from users. Looking at multiple user journeys shows patterns and crucial elements that frustrate users' experiences, as well as solutions that users themselves have found. See an example here: <http://groundtruthsolutions.org/our-work/improving-user-journeys-humanitarian-cash-transfers/>
- **Islamic Relief Worldwide: Most Significant Change**

Islamic Relief Worldwide (IRW) uses a number of tools and approaches that aim to improve the capture and use of qualitative data. Rather than pinpointing a single tool, a number of tools work together, in capturing and using qualitative data for project evaluation. One of these is the Most Significant Change (MSC) technique, which ensures the views of project stakeholders are given primacy over the interpretations and assumptions of the evaluator. The tool also allows another way for not only project stakeholders to provide feedback, but also for the evaluator to feed back to the stakeholders.
- **USAID: Updated Proposal Guidelines**

While most of OFDA indicators are still output-oriented and quantitative, the custom outcome indicator may now be qualitative. The requirement to incorporate beneficiary feedback and sharing of monitoring results with the affected population should also result in more qualitative monitoring. The requirement for a Theory of Change should allow partners to plan and develop monitoring in terms of outcomes rather than outputs. You can see more details here: <https://www.usaid.gov/what-we-do/working-crisis-and-conflict/crisis-response/resources/guidelines-proposals>
- **PLAN International: Gender and Accountability Monitoring Tool**

The standard questions of the tool and the regular scoring against the Gender and Age marker allow the Plan UK DRMU to look at achievements and challenges for ensuring all programmes are gender sensitive whilst having qualitative information about ongoing trends.

- **RedR UK: Using Salesforce to collate qualitative participant feedback**
The online system has reduced the amount of manual inputting of qualitative data from paper-based forms which allows RedR to focus more on the analysis and use. For example, it is now easier to run various types of reports based on the feedback (e.g. by course, by lead trainer, or by location).
- **Solidarites International: Quality Follow-up Tool**
The Quality Follow Up tool consists of a list of statements taken from URD's Quality Compass (critical incidents) and the Core Humanitarian Standards. Programme Managers gather up their teams (all team members including field officers) and rate (using a grading system) if the statement is observed. The Quality Follow Up Tool is mainstreamed across all programs.
- **Tearfund: TRACK**
An organisation-wide online database with a web front end. The primary objective of this database is to capture information of all stages of the project management cycle. In terms of qualitative monitoring data, this platform collects stories which users can then search by applying various conditions and sectors. The Advanced search function allows users to identify and compare stories of transformation that come under the same category. This allows better comparison of qualitative findings across countries and projects, helping us to monitor and share learnings.
- **UNICEF: Guidance on Field Monitoring (FM) and supporting apps**
UNICEF is investing in a multi-pronged approach to strengthening practice in FM as a key qualitative data collection exercise – improving guidance, electronic tools and investment in training for roll-out over 2019. Guidance builds a common understanding across all offices on expected practice; it provides basic elements on concept, purpose, scope of field monitoring, including key methods for qualitative data collection and key hooks for quality assurance of implementation, analysis and use of the data.
- **War Child Holland: Community-based child protection index**
This is a standardised tool from War Child's Global Monitoring Framework. By matching qualitative data to a numeric scale, it is possible to measure and compare progress in different contexts and different countries. Since we compare change over time, rather than the scores themselves, different start and end points are not important.

- **War Child Holland and UK: Participant Satisfaction Tool**

The tool is used to guide Focus Group Discussion (FGDs) to collect data on different elements of participant satisfaction, framed by and mapped to the CHS commitments in a simple way. Children score each category using the range of 'happy/unhappy faces used in CHS assessment, based on a series of prompt questions, and explain the reasons for their scoring, including which specific aspects of the support they are receiving they are satisfied/unsatisfied with and why.
- **WFP: Monitoring Communities and Best Practice Platform**

WFP use Regional and Global Monitoring web-based communities. These are virtual networks to share ideas, innovations, and best practices in Monitoring across WFP's worldwide operations. In turn, the Monitoring Best Practice Platform facilitates an active exchange on innovative monitoring tools and practical monitoring know-how in WFP. The platform serves as a growing archive of practical and innovative resources in line with WFP's performance-oriented monitoring processes.