Remote monitoring for Covid-19 response projects

Why is remote monitoring important?

This document provides guidance on remote monitoring for Covid-19 responses where there is limited physical access to project sites, such as during lockdown, or where government restrictions on movement and social distancing measures are in place. Monitoring is important, even in these circumstances, to make sure that the projects adhere to humanitarian principles and are accountable to beneficiary communities, and to ensure that we are continually improving, adapting and learning. However, the top priority is **do no harm** and please ensure that you follow the relevant government regulations in your context during this time and keep your distance.

This document provides an overview on what remote monitoring is and how to approach it, including data collection tools, good practice examples and details of information and communication technologies that support remote monitoring. **Keep it simple:** only collect the essential data and information, liaising with the donor if necessary to reduce what needs to be reported**.**

This guidance seeks to help you keep your remote monitoring and evaluation (M&E) as simple and as manageable as possible. **Do what is feasible and practical:** this is not the time to be learning lots of new systems/technologies and skills.

The Impact and Effectiveness team at Tearfund are here to support you as you adapt your working practices. You can find a Q&A section and instructions on how to **share your learning** and experiences of adapting to remote monitoring in this document. **Please feel free to contact your DME adviser for further support.** (Find out who your DME adviser is in the table below.)

tearfund.org/covid19
covid19-response-team@tearfund.org

tearfund

DME advisers:

SEA: Jonathan Simpson	ECA: Abraham Leul	WA: Virgil Anyim
Asia: Ben Keenan	LAC: Norman Molina	ENA: Lauren Kejeh (temporarily)

What is remote monitoring?

Monitoring is about using data to measure and assess the performance of a project/programme with the aim of improving its results. Remote monitoring refers to situations in which this data is collected or submitted without the physical presence of staff from the organisation implementing the programme. Typically, remote monitoring is necessary when the implementing organisation cannot physically access project locations for a prolonged period (usually due to conflict or, in this case, due to a viral pandemic) and will therefore need to rely on other 'non-physical' approaches to collect M&E data from beneficiaries/stakeholders such as via SMS or other digital technology.

How do I do remote monitoring?

M&E practitioners have experimented with a number of creative ways to overcome limited access to communities. Some examples of frequently used tools for remote monitoring are presented in the table below:

Remote monitoring tools (*adapted from *Evaluation of Humanitarian Action Guide*, ALNAP)					
Technique pre Covid-19	**Covid-19 adaptation**	**How to use this method**	**Example of use**	**Potential pitfalls**	**What needs to be in place?**
Face-to-face interviews and surveys Key	Carry out surveys and interviews online, by phone, and/or	These can be used for relatively short and straightforward surveys, eg to find out when people received assistance, what	Soap/hygiene kit distributions: Collect numbers during distribution for post-distribution	SMS and online surveys are subject to self-selection bias and so the findings need to be interpreted with care.	**Option A:** Beneficiaries have mobile phones and consider how you will reimburse

informant interviews	SMS/WhatsApp instead. Adapt the questions to ask only the essential questions.	and how much. Phone surveys might also be used for field-based staff. Only ask essential questions. Test the questions before using them and time how long it takes. SMS surveys take twice as much time as face-to-face surveys so it is crucial to ask the minimum number of questions possible.	monitoring through text messages. Mobile money cash transfers: Post-distribution monitoring through text messages. Psychosocial support: Follow-up text messages / WhatsApp messages	Phone surveys may also be associated with bias, eg accessible only to those who have mobile phones. In a highly politicised environment, local people may not trust and/or be reluctant to speak to someone they do not know.	beneficiaries for credit used during interview/survey. Project team have phone numbers. **Option B:** Existing community communication structures in place and access to these such as a community liaison contact point with access to a phone.
Observation (eg transect walks)	Remote observation instead	Key informants and members of the affected population can be asked to take videos and photographs, using cameras with built-in Global Positioning Systems (GPS).	Handwashing facilities set up: Photos sent of handwashing facilities A story of impact can be shared through video or practical aspects of the project, eg beneficiaries picking up packages, signing up lists.	While this may be suitable for observing the physical landscape and infrastructure, it may reveal little about how it is being used, eg who has access to particular infrastructure such as water points. Can be coupled with a Behavioural Change Survey sent to	Community members have phone-camera capability for photo messaging/video access.

				phones in the community.	
Monitoring key messaging through social media	Crowd-sourced data, eg Twitter, Facebook	Crowd-sourced data could be used to look at how widespread the use of particular facilities is through mobile phone tracking. Check if remote monitoring has been done through social media such as Facebook and Twitter, and if/how the data could be used in the evaluation.	Content analysis from social media on what is being discussed, thoughts and feelings about a specific issue Obtain perspectives from people using services through collecting 'live' comments. Monitoring reach of key health messaging	Respondents are self-selected, thus introducing bias, eg young people are more likely to use social media than older people. There may have been social media campaigns undertaken by parties to the conflict. Difficult to analyse/careful design needed	Access to social media channel
Focus group discussions (FGDs) – face to face	Conduct FGDs via three-way or multi-person audio/video call if technology permits.	Keep the questions short and to the point.	Discussing more sensitive issues that may benefit from a group discussion	It will be much harder to reach the most vulnerable due to the need for a strong internet connection, especially for video calls.	Access to internet/ reliable network
Beneficiary feedback mechanisms such as:	Best to use toll-free telephone numbers only,	Set up and advertise a toll-free telephone number via radio announcements and	Advertised at a hygiene kit distribution site. Beneficiaries can call to give feedback on quantity	Beneficiaries may not feel comfortable to call an unknown person. To help counter this, two telephone	Requires beneficiaries to have access to a phone

- Help desks - Toll-free telephone number - Feedback box	if possible	loudspeakers, if possible. Posters can be used if placed in strategic places but are less effective in lockdown conditions. The telephone number can be an opportunity for the affected population to raise questions or concern, especially if it was set up during programme implementation.	and quality of items. They can also call to make any complaints.	numbers could be in place and advertised: one for females and one for males. In a highly politicised environment, local people may not trust and/or be reluctant to call altogether.	A toll-free number needs to be set up or alternatively beneficiaries can leave a missed call to a standard number and be phoned back.
Secondary data	Using existing data	Consider what secondary and other data is available if you cannot access the affected population.	Qualitative analysis of secondary data, such as progress reports Numerical analysis of distribution data such as distribution data records Situational reports, needs assessments, crisis-specific portals such as ACAPs for global analysis and context-specific insight Broader strategy documents	There may be very limited or too much data available.	Where possible, data from documents should be tested through triangulation.

What technology should I use?

- **Keep it simple:**
  - Text messages
  - Voice calls
  - WhatsApp messages and voice notes
  - WhatsApp channels: consider creating a WhatsApp channel for group-sharing communication more widely

- **More advanced tools** (only recommended if you have some experience of the tools)

Platform/App	Description
Impact Tracker Tech	A catalogue designed to help organisations navigate the world of digital tech. It contains simple tools to collect data, communicate with beneficiaries and measure impact.
KoBo Toolbox	KoBo Toolbox is a free open-source tool for mobile data collection, available to all. It allows you to collect data in the field using mobile devices such as mobile phones or tablets, as well as with paper or computers. It is being continually improved, particularly for the use of humanitarian actors in emergencies and difficult field environments, in support of needs assessments, monitoring and other data collection activities.
Viamo	Viamo is a mobile technology platform that offers data collection services such as mobile surveys and digital forms and information-sharing such as behaviour change campaigns.
TextIt	An SMS online app that allows the user to create SMS and voice applications. TextIt allows you to customise messages using information you've collected from the user, allowing for personalised messages and increased response rates.

Case study

Keeping it simple – using existing technology and relationships for remote monitoring

Seventy-five per cent of Zimbabweans are already on WhatsApp**.** Our partner ZOE in Zimbabwe switched from using POImapper[1] to WhatsApp as this was an existing, familiar and accessible channel for communication. Rolling out POImapper required significant capacity building and budget. Furthermore, learning from a previous project demonstrated that it was not effective to have a complex system that is largely managed in Teddington as this can create unnecessary bottlenecks and high costs.

Using WhatsApp to collect data, the M&E officer created a list of questions that were agreed in advance with key stakeholders. At an appointed time and day, the M&E officer engaged the field coordinator on WhatsApp and began asking the questions. Because the field coordinator had already been made aware of the questions in advance, information had already been collected and therefore shared in real time. This information was then extracted and copied into Excel using the WhatsApp desktop app.

The partner incorporated the cost of the data into the M&E budget by setting aside a fixed amount per month per user. They controlled the contract of the lines and agreed with the service provider that the data would be dispersed to all lines at a certain date. The following day the partner carried out 'M&E reports' via a WhatsApp call, ensuring that the coordinator always had airtime to report. This was a cost-effective approach as it entailed only a fraction of the cost of sending M&E staff from outside the community to visit each month; instead a visit occurred every quarter to verify the data. In addition, two WhatsApp groups were created: one for the coordinators to communicate socially and another for reporting. The 'Social' WhatsApp group provided a space for shared learning and created a bond among people who otherwise met for only three days each year. The 'Reporting' group provided a space for coordinators to upload stories, photos and videos of which partner staff would then select two stories a month from a list of around 20! The partner would then call the relevant coordinator and get the 'full' story in depth plus any additional photos. This approach used a form of Most Significant Change (MSC) story collection which

[1] A more complex mobile application used to collect and update data

worked well in this context. Once the report and some photos had been sent, the partner was happy to allow any remaining credit to be used freely/ We found this was mostly used for the WhatsApp Social group, which the partner encouraged.

Considerations:

- **Using existing channels of information:** Think through your existing community liaison contact points and the networks they have access too. These people will be able to relay information. It is important to use other sources as well to verify the information that they are providing.
- **Consent:** Ensure you request permissions for participation and if you want to record the interview.
- **Budget:** Can you reallocate any existing budget that you had for field visits to pay for buying any new technology or sending messages?
- **Sample size:** Consider your sample in light of people not answering their phones!
- **Targeting:** Remember those without a phone often are the most vulnerable and there is often a gender divide in terms of access to technology. Draw on community relationships, existing networks or your community liaison as a proxy to gather information.
- **Training requirements:** Do project staff know how to use the remote monitoring tools that you have selected? If not, can you train people remotely? Is there a simpler technology that you can use that does not require training?
- **Script:** Have a script ready for how you introduce yourself and ask for consent to do a phone questionnaire. You might want to consider a structured interview questionnaire that you follow for every phone call, just like you would in a face-to-face assessment.
- **Data entry:** You also need to have a way to enter data as you ask the questions. This usually depends on what you're most comfortable with – you could prepare an Excel sheet for directly entering answers or consider entering data into KoboToolbox. Use what you have and feel most comfortable with.

- **Language:** When you're interviewing on the phone, it's usually faster to type down the answers in the language you're interviewing in. If you need your final data collection to be in English, go back and do the translation after you've hung up the phone. Make sure any questions sent via text messages, WhatsApp messages or voice notes are in a language that the beneficiaries speak.

Five key things to remember:

- **Do no harm:** The first priority is the safety of communities, partners and staff.
- **Keep it simple:** Only collect the essential information, liasing with the donor if necessary to reduce what needs to be reported.
- **Do what is feasible and practical:** This is not to be the time to be learning lots of new systems and skills so keep your remote monitoring system as simple as possible.
- **Ask for support:** Contact your cluster DME adviser for help and support.
- **We're all learning together:** We're all learning how to operate under the abnormal circumstances. Please share anything useful that you are learning to help us all navigate our way through this time by emailing impact.effectiveness.matrix@tearfund.org The guidance will be updated as we all learn.

Frequently asked questions:

If your question is not answered below, please email: **impact.effectiveness.matrix@tearfund.org**

How can I collect mobile numbers?

- Use the numbers you already have: it's better to hear from some beneficiaries, rather than none at all.
- It may be appropriate to collect numbers at the distributions; however, this will be context specific.
- If you can't contact beneficiaires then ensure beneficiaries can contact you through using beneficiary accountability mechanisms in place such as hotlines and feedback boxes. You may also be able to distribute the hotline phone number via radio.

How can I reach people who do not have a phone? Or mobile coverage?
Often those who do not have mobile phones are also the most vulnerable and it's really important to make sure that you're including these opinions. This poses a challenge with remote monitoring. It will not always be possible to do monitoring at all in these circumstances. One idea is to ask those who you are in contact with to provide information on their vulnerable neighbours. If people have phones but phone credit is an issue, some of the applications we've listed in this document enable you to send credit to beneficiaries.

How can I reach community members who are illiterate?
Again, this is more challenging for remote monitoring. Some ideas include using voice messages on WhatsApp and asking people to reply with emojis, making phone calls or sending photos.

How do I get consent for sharing stories that I collect?
If you are planning to share the stories that you collect, it is important to ask for consent first. To do this remotely, the first question in a set of text messages could be: 'Do you give permission for us to use your real name and photograph, and to publish your story in print and on the internet? Please reply "Yes" or "No".'

How can I build on and strengthen existing community-led M&E activities?
One way to do this is to ask beneficiaries how they would like to provide feedback and how often.

Under what conditions might the best option be to simply pause monitoring altogether?

Be guided by the local government restrictions: in most cases these will require avoiding physical contact. In a complete lockdown situation, where no project activities are taking place, consider using the time to catch up with monitoring tasks that can be done remotely. If limited movement is allowed, avoid physical contact unless absolutely necessary as part of life-saving work.

If a previous project I was working on is now responding to Covid-19, will its existing M&E plan need to be rewritten in light of this guidance?

In most cases people are creating new projects on Track, putting the existing project on pause. If you are continuing to implement an existing project, it is likely that targets will need to be revised downwards. Contact your DME adviser who will support you with this and if donor funded you will need to negotiate with the donor.