Building a flexible, low cost IT based M&E system

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Programme Manager, Technology
Introducing: Youth Business International

- **Global**: YBI is a global network of independent organisations, working together, to empower young entrepreneurs to start businesses and create employment.

- **Focused**: we work with the ‘missing middle’, under-served young entrepreneurs (aged 18-35) above subsistence but without access to finance and other key support.

- **Impactful**: Generating high impact results: sustainable businesses, new jobs, changed lives
Who we are

- **Global**: We aspire to reach as many young people as possible. The Youth Business International network is active, through its members, in **over 40 countries**.

- **Local**: We believe that local knowledge is essential to deliver effective support for young entrepreneurs. Every YBI member is an **independent, locally run and locally owned organisation**.

- The **YBI Network Team** exists to support and connect these organisations into a powerful community.

- Together the network combines a **decentralised structure and local knowledge** with the **global profile, accountability and impact** of a global NGO.
YBI M&E Systems: A multifaceted approach
**Aim:** to improve the livelihoods of 10,800 youth and their families through entrepreneurship.

**Methodology:** provision of entrepreneurship training and ongoing support to help start and/or expand businesses.

**Funding:** from DfID Uganda with YBI (grant holder), partnering Enterprise Uganda (implementer).

**MEL Tech Challenges:**
- Large number of participants.
- Services delivered in very remote areas.
- Both YBI and Enterprise Uganda responsible to the funder.
A Monitoring & Evaluation Tech System: The constituent parts (1)

Tools to capture information

Methods to refine the quality of the information

Some means of storing the information

Ability to add context to the information

Ways to analyse the information

Means to present the information
A Monitoring & Evaluation Tech System: The constituent parts (2)
The Database: Or databases?
The Database: Attributes to look out for

- Accessibility
- Resilience
- Development speed
- Integrations
- Business processes
- Security
- Analytics

- Social
- Audit trails
- Community
- Roadmap
- Licence model
- Cost
The Database: Tools of the trade (examples)

CRMs:
• Microsoft Dynamics
• Salesforce *
• SugarCRM
• CiviCRM

Fundraising focussed:
• The Raiser's Edge
• AdvantageNFP
• iMIS

Other:
• SQL
• Excel *
• Google Docs
• Access
• Airtable
• SmartSheet *

* Indicates a tool that YBI are using

¿Please share any other that your organisation uses?
The Database: NUYEP - an example (2)
Client information: Methods of collection

Digital

- Self-service
- Supported

Analogue

- Self-service
- Supported
Client information:
Data dictionary - Definitions and mappings

Must take into consideration: definitions; languages; cultural contexts; motivations

<table>
<thead>
<tr>
<th>Question on the survey</th>
<th>Name of data point</th>
<th>Context rich data</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many people do you pay as an employee of your business?</td>
<td>Number of paid employees</td>
<td>Number of paid employees working more than 30 hours a week</td>
</tr>
</tbody>
</table>
Client information: Attributes to look out for

- Context and content appropriate
- Integration with your database
- Process automation
- Data validation
- Archiving
- Submission IDs
- Multi-lingual

- Offline vrs Online
- Accessible
- Security
- Privacy
- Alignment to business process
Client information: Tools of the trade

Online surveys:
• Google Forms
• surveymonkey.com
• formstack.com *
• getfeedback.com *
• formassembly.com

Apps:
• surveycto.com
• Salesforce Lightning
• AppInstitute.co.uk
• iFormBuilder

SMSs:
• sms-magic.in *
• smssurveys.co.uk
• textanywhere.net

Others:
• ifttt.com
• zapier.com
• mostsignificantchange.com *

¿Please share any other that your organisation uses?
Data quality: The DQ Gateway vs DQ Activities

Do you ensure the quality of data before it gets saved in your database, or do you use the tools in your database to improve data quality?

DQ Gateway
- Digital collection allows question response validation eg.:
  - Required questions;
  - Limited responses through pick lists;
  - Valid formats eg. addresses
  - Minimum and/or maximum values
- Analogue collection allows a ‘sense checking’ review by staff

DQ Activities
- Allows to identify:
  - Data point outliers
  - Duplicate records
  - Data inconsistencies
- Allows to correct programmatic changes
- Any changes made may affect data integrity and an audit trail should be used
Client information and data quality: NUYEP - an example (3)

Client Surveys:
- Baseline
- Attitudes survey x 2
- Follow-up surveys x 4

\[
\text{\{ = 48,000+ submissions }
\]

Data quality sense check
Form validation
DQ Reports

Client surveys on paper
Student data entry clerks
Search for client record
Custom link to Formstack form
Creates Evaluation record and updates client records
Identify data outliers and duplicates
Data analysis and communication: Who, what, when, how (1)

- Who will consume the information?
- What are their objectives for analysing the information?
- What format is most appropriate?
- How much detail do they need?
- How important is the context to understanding?
- How timely must the information be?
- How much training can you give them?
- Is data governance going to be important?
- Will the analysis need to be reproducible?
Data analysis and communication: Who, what, when, how (2)

- **Simple**
  - Structured: Reports & Dashboards
  - Self-service: Self-Service Business Intelligence

- **Complex**
  - Structured: Spreadsheets
  - Self-service: Guided Business Intelligence

- **Simple**
  - Structured: Reports & Dashboards
  - Self-service: Self-Service Business Intelligence

- **Complex**
  - Structured: Spreadsheets
  - Self-service: Guided Business Intelligence
Data analysis and communication: Reports and dashboards considerations

• Can users create their own reports and/or dashboards?
• How simple are they to build? How much training is required?
• Can users add filters on the fly?
• Can you have layers of access?
• Can they be published/shared?
• Can they be ‘socialised’?
• Are they available on mobile devices?
Data analysis and communication: Business Intelligence apps

Self Service Business Intelligence apps:
- Tableau
- QlikSense
- Microsoft BI Reporting

Guided Business Intelligence apps:
- Salesforce Wave
- QlikView *
- LogiAnalytics

Considerations:
- Cost
- Data governance
- Data transformation
- Who is consuming your information anyway? What are their needs, what are their access points?
- Training to use develop the apps
- Training to use the tools
- Product roadmap

¿Please share any other that your organisation uses?
Data analysis and communication: NUYEP - an example (4)

Project staff wanted to monitor outputs and evaluate outcomes to enable ‘live’ learnings, thus allowing adaptation of the project.

[Demo of Salesforce Reports and Dashboards]

The ‘live’ learnings:

• Low female participation
• Outcome variations between participants
• Return rate for follow-on services
• Potential for wider socio-economic benefits
How MEL and Tech

OMS - EUg NUYEP Outcomes Dashboard
10/05/2016 10:45 - As Newton Buteraba

Outcome 1 - part I

New Enterprises Started (a)

Outcome 1 = a + b :: Milestone 1 target = 1,0...

Outcome 1 - part II

Enterprises Expanded (b)

Outcome 1 = a + b :: Milestone 1 target = 1,0...

Outcome 2

Waged Jobs Created (c)

Outcome 2 = c/(a + b) :: Milestone 1 target = ...
OMS - EUg NUYEP Outputs 2.1 - 2.5 Dashboard

22/04/2016 15:28 • As Newton Buteraba

Output Indicator 2.1
- Outreach campaigns
  - Record Count: 11:92%

Output Indicator 2.2
- Young people paid BEST fee
  - Record Count: 15,920:152%

Output Indicator 2.3
- Young people completing BEST
  - Record Count: 13,377:159%

Output Indicator 2.4
- Young people received business training
  - Record Count: 4,926:136%

Output Indicator 2.5
- Savings and investment clubs

Total gender split
- Male: 6,300, Female: 4,200

Total gender split
- Male: 2,709, Female: 1,806

Youth Completed By Region

- Region A: 2,012, Region B: 1,701, Region C: 1,319, Region D: 1,284
YBI M&E Systems:
YBI KPIs - another example

[Demo of Salesforce community]

[Demo of QlikView KPI app]
Why M&E and Tech

YBI M&E Systems: A multifaceted approach

- Network Performance
- Member KPIs
- Member Feedback
- Capacity Development
- Project MEL
- Capacity Development
  Contribution MEL
- Programmatic MEL
- Project MEL
# Test YBI Member

**KPI DEFINITIONS**

- **Period:** 1 January to 31 December 2015  
- **Status:** Submitted

<table>
<thead>
<tr>
<th>YBI KPI</th>
<th>Status</th>
<th>Frequency</th>
<th>Member's Method of Measurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Number of young people engaged through outreach and awareness raising</td>
<td>Measured</td>
<td>Annual</td>
<td>Vhidambaram is the recipient a number of awards and honours. The Indian Government acknowledged his contribution to the successful nuclear tests by</td>
</tr>
<tr>
<td>2. Number of young people who applied for entrepreneurship support</td>
<td>Measured</td>
<td>Annual</td>
<td>Wilfred Rhodes (29 October 1877 – 8 July 1973) was an English professional cricketer who played 58 Test matches for England between 1899 and 1930. In</td>
</tr>
<tr>
<td>3. Number of young people provided with entrepreneurship training</td>
<td>Measured</td>
<td>Quarterly</td>
<td>ds</td>
</tr>
<tr>
<td>4. Number of young people provided with a grant, loan or other finance</td>
<td>Measured</td>
<td>Quarterly</td>
<td>dsag</td>
</tr>
<tr>
<td>5. Total Number of young people with an active loan</td>
<td>Not Measured</td>
<td>Annual</td>
<td>hjouh</td>
</tr>
<tr>
<td>6. Number of young people provided with other ongoing advice and support</td>
<td>Measured</td>
<td>Quarterly</td>
<td>hou</td>
</tr>
<tr>
<td>7. Number of young people matched with a volunteer business mentor (as a subset of KPI number 6)</td>
<td>Measured</td>
<td>Annual</td>
<td>lubbkjbj</td>
</tr>
<tr>
<td>8. Total Number of young people working with a volunteer business mentor</td>
<td>Measured</td>
<td>Annual</td>
<td>houh</td>
</tr>
<tr>
<td>9. Number of new businesses started</td>
<td>Measured</td>
<td>Quarterly</td>
<td>dfbdfb</td>
</tr>
</tbody>
</table>
## YBI KPI

1. **Annual**
   - **Number of young people engaged through outreach and awareness raising**
   - **Year:** 2014
     - Male: 0
     - Female: 40
     - Total: 40
   - **Year:** 2015
     - Male: 11
     - Female: 1
     - Total: 12
     - Comment: 1

2. **Annual**
   - **Number of young people who applied for entrepreneurship support**
   - **Year:** 2014
     - Male: 0
     - Female: 30
     - Total: 30
   - **Year:** 2015
     - Male: 21
     - Female: 2
     - Total: 23
     - Comment: 2

3. **Quarterly**
   - **Number of young people provided with entrepreneurship training**
     - **Year:** 2014
       - Male: 101
       - Female: 100
       - Total: 201
       - Comment: 3
     - **Year:** 2015
       - Male: 0
       - Female: 0
       - Total: 0
     - **Forecast:** 2016
       - Total: 10

4. **Quarterly**
   - **Number of young people provided with a grant, loan or other finance**
     - **Year:** 2014
       - Male: 0
       - Female: 0
       - Total: 0
     - **Year:** 2015
       - Male: 100
       - Female: 100
       - Total: 200
     - **Forecast:** 2016
       - Total: 10
How MEL and Tech

YBI M&E Systems:

YBI KPIs: New Businesses Started by Quarter
How MEL and Tech

YBI M&E Systems:

YBI KPIs: Entrepreneurship Training: Comparing this year to last

<table>
<thead>
<tr>
<th>Year Joined</th>
<th>Value</th>
<th>Year Joined</th>
<th>Value</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>50 k</td>
<td>2013</td>
<td>497</td>
<td>-3.7%</td>
</tr>
<tr>
<td>1992</td>
<td>20 k</td>
<td>2013</td>
<td>763</td>
<td>73.4%</td>
</tr>
<tr>
<td>1994</td>
<td>10 k</td>
<td>2013</td>
<td>200</td>
<td>9.5%</td>
</tr>
<tr>
<td>1996</td>
<td>5 k</td>
<td>2013</td>
<td>12</td>
<td>-73.3%</td>
</tr>
<tr>
<td>1998</td>
<td>2 k</td>
<td>2013</td>
<td>204</td>
<td>63.2%</td>
</tr>
<tr>
<td>2000</td>
<td>1 k</td>
<td>2013</td>
<td>1863</td>
<td>62.6%</td>
</tr>
<tr>
<td>2002</td>
<td>500</td>
<td>2013</td>
<td>2449</td>
<td>2.9%</td>
</tr>
<tr>
<td>2004</td>
<td>200</td>
<td>2013</td>
<td>120</td>
<td>-52.0%</td>
</tr>
<tr>
<td>2006</td>
<td>100</td>
<td>2013</td>
<td>230</td>
<td>-3.4%</td>
</tr>
<tr>
<td>2008</td>
<td>50</td>
<td>2013</td>
<td>155</td>
<td>-64.1%</td>
</tr>
<tr>
<td>2010</td>
<td>10</td>
<td>2013</td>
<td>341</td>
<td>-100.0%</td>
</tr>
<tr>
<td>2012</td>
<td>20</td>
<td>2013</td>
<td>46</td>
<td>24.3%</td>
</tr>
<tr>
<td>2014</td>
<td>50</td>
<td>2013</td>
<td>110</td>
<td>-</td>
</tr>
<tr>
<td>2016</td>
<td>20</td>
<td>2013</td>
<td>220</td>
<td>-</td>
</tr>
<tr>
<td>2018</td>
<td>10</td>
<td>2013</td>
<td>7441</td>
<td>-10.7%</td>
</tr>
<tr>
<td>2020</td>
<td>20</td>
<td>2013</td>
<td>816</td>
<td>-16.5%</td>
</tr>
<tr>
<td>2022</td>
<td>10</td>
<td>2013</td>
<td>38380</td>
<td>69.0%</td>
</tr>
<tr>
<td>2024</td>
<td>50</td>
<td>2013</td>
<td>3440</td>
<td>53.8%</td>
</tr>
<tr>
<td>2026</td>
<td>500</td>
<td>2013</td>
<td>246</td>
<td>-</td>
</tr>
<tr>
<td>2028</td>
<td>100</td>
<td>2013</td>
<td>255</td>
<td>-</td>
</tr>
<tr>
<td>2030</td>
<td>200</td>
<td>2013</td>
<td>0</td>
<td>-100.0%</td>
</tr>
<tr>
<td>2032</td>
<td>500</td>
<td>2013</td>
<td>179</td>
<td>-31.9%</td>
</tr>
</tbody>
</table>
YBI M&E Systems: How MEL and Tech

YBI KPIs: How representative is our network?