

PRACTICE NOTE: REMOTE MONITORING AND EVALUATION

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BACKGROUND

Working in the age of COVID-19 presents unprecedented challenges to the delivery of Aid programs, including wide ranging challenges to measuring development success. Australia's Partnerships for Recovery strategy sets out DFAT's approach to development in the Indo-Pacific and work on strengthening health security, maintaining stability, stimulating economic recovery and promoting gender equality.

Section 8 of Partnerships for Recovery strategy outlines the challenges COVID-19 presents to both remote program delivery and humanitarian assistance, and implications for achieving and measuring development impact. While a performance framework is in place to measure the successes of country and regional development response plans, proposed monitoring and evaluation activities are far from business as usual. At the time of writing, travel restrictions and the uncertain operating environments means the demand for new ways of working within DFAT and by external partners has increased. These ways of working will also continue to be relevant to rapid onset and protracted crises situations that emerge in our region. The disproportionate impact of COVID-19 on women, people with disabilities and marginalised groups also requires an increased focus on gender and social inclusion in monitoring.

With up to a third of DFAT staff and a quarter of international technical advisors (TA) initially evacuated from Posts and many working remotely, DFAT is facing the need to use new approaches to program delivery and

monitoring and evaluation (M&E)¹. This has created an opportunity to trial new ways of working and to potentially identify remote approaches which are more efficient, with a greater focus on critical information for decision making and increasing local input. However, this has also created some additional risks for DFAT where M&E systems cannot be implemented as before the pandemic. Interruptions to monitoring and evaluation data collection could potentially:

- reduce the quality and availability of information to program managers about the performance of their programs
- reduce program managers' ability to have oversight of their programs and implementing partners' performance
- make it more difficult for program managers to identify where improvement is needed in their programming

As noted in DFAT's M&E standards, high quality monitoring and evaluation products are required to ensure that information generated from investments has a credible basis and is suitable for use to make important programming decisions and for wider learning. In turn, this is expected to lead to improved accountability, and a more effective and efficient development program.

PRACTICE NOTE PURPOSE AND AUDIENCE

This practice note aims to provide practical and useful advice for DFAT staff and implementing partners as to how and when to use remote M&E in their programs. It provides advice tailored to the context of the Australian Development Program, drawing on the current literature and experiences of both Australia and other development partners. It complements the [Aid Programming Guide](#) and [DFAT's Monitoring and Evaluation Standards](#).²

The practice note is structured as follows.

- It provides an Introduction to remote M&E, outlines what it is and when it is used
- It provides guidance around implementing Remote M&E in your program, including the two key roles of DFAT officers
- It presents the key risks around remote M&E and some suggested management options
- It then concludes with a summary of dos and don'ts as a quick reference guide

¹ This practice note refers to monitoring and evaluation throughout as this is currently the common term used. Some other organisations refer to MERLA- monitoring, evaluation, research, learning and adaptation to capture how monitoring and evaluation data is used in program management.

² The development of this practice note involved a literature review and consultations with 34 stakeholders from DFAT, implementing partners, M&E consultants and other development organisations, including ODI and MFAT over November and December 2020. The literature list of 17 documents was compiled through Google searching and documents shared by those participating in the consultations. Information from the literature review and consultations was synthesised against an analytical framework outlining the key lines of enquiry for the practice note. There was a particular focus on the experiences of implementing partners in Indonesia which informed the Indonesia Case Study. Consultations were undertaken with a selection of Indonesian investments and two break out sessions were held with DFAT staff in the Indonesia program to explore their experiences and lessons around remote M&E during the COVID-19 pandemic in 2020.

INTRODUCTION TO REMOTE M&E

WHAT IS DIFFERENT ABOUT REMOTE MONITORING AND EVALUATION?

Remote monitoring and evaluation can be suitable when donors and/or implementing partners face travel or access restrictions that hinder their ability to gather performance information in person – for example, through face-to-face interviews, focus groups discussions, site visits, or stakeholder workshops.

Compared to more traditional M&E, remote M&E may involve changes in any of the following:

‘How’ data is collected such as:

- **Greater use of technology** for data collection, reflection, and reporting e.g. virtual workshops, SMS and phone surveys, virtual videoconferencing

- **Greater use of digital secondary data** e.g. phone records or banking information from private sector sources, social media data, online maps or government data sets, sometimes also termed ‘Big Data’

Annex 1 details a wide range of potential remote data collection methods – such as Mobile Survey Data Collection Tools, Computer Assisted Telephone Interviewing, Mobile apps for Two-Way communication, Web surveys, Media Content Analysis, Satellite Imagery, Drones, and Geomapping/ Geotagging. For each of these methods, Annex 1 includes pointers on when to use the method, its advantages and disadvantages, examples, and further resources. This is likely to be a useful resource to both DFAT and implementing partner staff.

‘Who’ conducts data collection, such as:

- **Implementing partners (IP)** (e.g. Managing contractors, NGOs or multilaterals) anticipate and adopt a more localised approach engaging local authorities, community members, beneficiaries or sub-contracted data collection companies to do more data collection, given travel restrictions affecting implementing partner staff based in capital cities.
- **DFAT engaging third parties to conduct monitoring on their behalf** such as:
 - Other donors or implementing partners (sometimes called peer monitoring)
 - Separately contracted M&E service providers

Annex 2 unpacks key options relating to who conducts data collection in remote M&E contexts. Some of these options are already being employed by DFAT and other development partners to strengthen the robustness of performance information from key investments - such as third-party monitoring. For each option, Annex 2 details when to use the approach, its benefits and challenges based on global lessons to date, practical examples, and links to further resources. This will be particularly useful to DFAT staff considering how to allocate responsibilities for M&E within their aid investments or portfolios.

‘What’ data is collected, such as

- Changes to **outcome data** needs resulting from revised theories of change
- Rapid studies to understand changes in program **context and risk**
- An increased focus on collecting data about **unintended consequences**

CONTEXTS WHERE REMOTE M&E HAS BEEN USED TO DATE

Remote M&E is not new. Well before COVID-19 travel restrictions emerged, remote M&E methods were broadly used in humanitarian and insecure environments such as conflict settings or in natural disasters, where security concerns restricted travel to the field. For example, in Afghanistan, the high-risk environment has meant that DFAT program staff are unable to travel beyond their offices, and contracted advisers cannot be deployed in the field. Under the World Bank managed Afghanistan Reconstruction Trust Fund (ARTF), DFAT relies on World Bank monitoring systems which includes the use of third-party monitoring.

Remote M&E has also been applied for development programming in remote locations, where terrain, weather conditions or political challenges (e.g. government approval to travel) prevent access to program sites. Remote M&E has also been used during health crises, such as in the 2014-2016 Ebola epidemic in West Africa.

Some M&E practitioners may purposefully adopt some remote M&E methods alongside more traditional M&E methods, focused on a particular set of questions and then use more traditional face-to-face M&E methods to gather more in-depth data periodically.

REMOTE M&E IN RELATION TO COVID-19

The COVID-19 pandemic has caused significant restrictions on travel, both internationally and domestically, preventing many traditional approaches to M&E such as face to face interviews, focus group discussions, or site visits. COVID-19 has also created program management challenges which affect program M&E e.g. team communication challenges as program implementation teams are in some contexts physically separated and cannot even meet amongst themselves. This note provides some guidance to address both of these challenges.

IMPLEMENTING REMOTE M&E IN YOUR PROGRAM

DFAT STAFF REMOTE M&E RESPONSIBILITIES

DFAT staff have two key roles in ensuring good practice remote M&E in their programs:

1. Ensuring that the M&E systems for their investments, usually developed by implementing partners, are adapted to reflect COVID-19 impacts and make appropriate use of remote M&E methods, and produce outputs of sufficient quality.
2. Commissioning and managing evaluations that need to be conducted remotely.

This practice note walks DFAT staff through the steps involved in their performance of each of these roles.

Annex 1 includes information about different remote monitoring data collection approaches and additional resources on remote monitoring and evaluation. **Annex 2** discusses different actors and partners who may undertake remote monitoring and evaluation on behalf of the implementing partner. Annex 3 includes a list of steps for implementing partners to follow when adjusting their M&E systems.

DEVELOPING OR REVIEWING YOUR INVESTMENT'S MONITORING AND EVALUATION SYSTEM

Most programs will need to review their M&E system to respond to the impacts of COVID-19. Key steps for DFAT investment managers to consider are outlined below:

Query	Response approach
<p>1. Is the program's Theory of Change (ToC) still appropriate?</p>	<p>Lead a discussion with your implementing partners (IPs) and counterparts about whether the program's ToC should be updated e.g. to respond to changes in the needs or priorities of partners or beneficiaries. If it is agreed that changes are required, DFAT or the implementing partner may need to engage an advisor with ToC expertise to facilitate these changes and to ensure that the ToC is evidence-based.³</p>
<p>2. What changes are needed to the implementing partner's M&E system?</p>	<p>Discuss with the implementing partner whether they need to make changes to WHAT information the M&E system captures and/or WHO, WHEN or HOW M&E system tasks are conducted. The implementing partner should revise as needed, taking into account guidance in this note and ensuring alignment with DFAT's M&E Standards – (see Annex 1 for guidance on remote M&E methods, Annex 2 for guidance on who can do remote M&E and Annex 3 for implementing partner guidance on revising their plans). Opportunities to better align with and strengthen partner government monitoring systems – which themselves need to adapt to COVID-19 restrictions - should be considered at this stage. Monitoring may also need to be updated to better monitor the differential impacts of COVID-19 on women and people with disabilities and the effectiveness of DFAT's response to their needs. (See DFAT Gender Equality in Monitoring and Evaluation – Good Practice Note). Also consider whether the program's risk management plans need to be updated (see the managing risks section below for further guidance).</p>
<p>3. Does DFAT need to engage additional M&E support or oversight?</p>	<p>If there are constraints on the ability of your implementing partner to implement required changes to the M&E system, consider whether DFAT needs to engage an additional monitoring mechanism. This could be:</p> <ul style="list-style-type: none"> • Monitoring by other donors or implementing partners (peer monitoring) • Monitoring by a contracted third-party monitor (TPM), managed by DFAT – the TPM could be solely responsible for data collection/analysis or could also be responsible for strategic interpretation of data and making recommendations, such as in the case of a Technical Advisory Group or TAG (See Annex 2 for guidance on the use of TPM) <p>Engaging an additional monitoring mechanism is administratively burdensome for DFAT and so requires a strong rationale. For example, if multiple implementing partners in a DFAT country program plan to engage the same provider of enumeration services in a particularly remote province, it may be more efficient for DFAT to engage this provider on behalf of multiple investments. Another case where such a mechanism may be appropriate is where an investment is using partner government systems, but you have major concerns about the quality or availability of monitoring data.</p>

³ Note that changes to your theory of change can only be made in line with DFAT's M&E standards i.e. changes can be made at output, activity, and input level in a formal planning process with DFAT and partners, but changes at 'end of program outcome' levels need to be formally approved with the DFAT budget delegate through a redesign process. See <https://www.dfat.gov.au/sites/default/files/monitoring-evaluation-standards.pdf>.

4. Does the revised M&E system meet DFAT’s M&E standards and the contractual requirements?	DFAT to assess the revised M&E system produced by the implementing partner to confirm that it meets DFAT M&E standard 2 and any contractual requirements. DFAT also to confirm that the risk management procedures in place are appropriate to manage any remote M&E risks.
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APPROACHES TO REMOTE M&E ACROSS DIFFERENT PROGRAM MODALITIES

The approach to developing and implementing M&E systems in an investment can differ depending on the investment modality. Below is a summary of the different program modalities and how the approach to M&E is likely to change when moving to remote M&E.

Managing Contractor Implemented Programs

M&E is usually the responsibility of the managing contractor where they are the main implementer. They develop a system to collect data to meet the information needs of the different audiences, including DFAT.

Where remote M&E is required, that plan is updated based on what is possible in the local context. There are lower risks as the requirements around M&E are usually outlined in contracts and the managing contractor can engage remote monitoring expertise as needed. The DFAT program manager should ensure that the M&E system has been updated and still meets the [DFAT M&E standards](#) and includes sufficient focus on gender equality in line with the [Gender Equality in Monitoring and Evaluation – Good Practice Note](#).

Multilateral Implemented Programs

Multilateral organisations generally have their own monitoring and evaluation systems and standards, which do not always entirely overlap with DFAT's systems. In most cases, they will use these systems to collect data and write reports which are tailored to DFAT's information needs. Where the M&E system needs to be adapted to remote M&E, the multilateral partner is responsible for reviewing the system and making and implementing the necessary changes. The DFAT program manager should ensure that the M&E system has been reviewed and updated and confirm in program progress reports that appropriate data is being collected.

Programs delivered through Partner Government Systems

M&E data collection in partner government implemented programs is generally dependent on the strength of the government's data collection systems. Where there are weaknesses, DFAT can choose to invest in building the capacity and strengthening the systems of the partner government in M&E where there is agreement from the partner. Alternately, DFAT may choose to engage a third-party to do additional performance monitoring as a risk management mechanism. See Annex 2 for further information about engaging third parties to do monitoring.

Programs delivered by NGOs

NGOs are normally responsible for the implementation of their own M&E systems. Where remote M&E is required, they may face challenges through not having access to the necessary systems, technology or expertise to implement remote M&E. DFAT can support NGOs with access to information and guidance about where to seek technical support to implement remote M&E.

COMMISSIONING, MANAGING AND OVERSEEING REMOTE EVALUATIONS

The below points present a summary of tips for commissioning, managing, and overseeing an effective remote evaluation based on experience, and should be read in conjunction with [DFAT's Monitoring and Evaluation Standards](#) and the [Aid Programming Guide](#).

1. Consider the possible composition of the evaluation team

- **Is face-to-face data collection possible?** While international travel may not be possible, if travel internally within your country is possible, you may want to consider an evaluation team which includes remote evaluators working with local evaluators or partners who can travel domestically and do local data collection.
- **Are there local evaluators who could be engaged to be part of the evaluation team?** In many countries, there are local evaluators who can bring valuable local contextual knowledge, language skills and experience in evaluation to an evaluation team. COVID-19 provides a good opportunity to build the capacity of local evaluators and promote the localisation agenda.

2. Decide how to contract the evaluation team

- **Would DFAT or the entity contracting the evaluation prefer to have a single contract with one entity who have arranged their own team?** This approach can be more administratively efficient and ensures DFAT has a single contact point who is responsible for evaluation delivery, including the quality of the inputs of all evaluation team members. For further advice on DFAT's Design and M&E Panel, please email designmail@dfat.gov.au.
- **Would DFAT or the entity contracting the evaluation prefer to contract individually the members of the evaluation team?** If there are particular people DFAT would like to be part of the evaluation team, you may decide to contract multiple people separately. In this case, ensure that all evaluation team members are accountable to the Evaluation Team Leader, so that they have appropriate authority to provide oversight and quality assure the work of the other team members.

3. Develop the Evaluation ToR

- **What is expected in terms of data collection and team composition?** Be clear in the ToR about whether data collection in country is expected or not and whether the involvement of local evaluators would be welcomed.
- **What is the scope of the evaluation?** In the ToR, try and be clear as to what is expected in terms of priorities for data collection and the number of stakeholders to be consulted to allow any evaluation teams bidding for work to appropriately scope and cost data collection.
- **Have you allowed at least four weeks of time to do remote data collection?** The more standard 2-3 weeks of data collection time is often insufficient in a remote evaluation. It can take longer to set up meetings and stakeholders are more likely to delay remote than face-to-face meetings. Many government partners are particularly busy and swamped with COVID 19 response activities and so have less time to engage with development program M&E, which can lead to delays. Furthermore, often more preparation is required for remote meetings than face-to-face meetings. Sudden changes in context or sudden lockdowns can require changes in data collection methods. The team may need extra time to adjust and be flexible (i.e. developing a written survey when requested by a partner, if a site visit suddenly isn't possible, changing location or changing data collection approach).
- **Have you budgeted for additional days for evaluation management for the evaluation team leader?** As remote data collection takes longer, there is often more management time required from the team

leader in briefing DFAT on progress and arranging evaluation consultations. More time is also required for internal evaluation team management when everyone is working remotely and there isn't time for team debriefing between meetings on a mission or after the day of data collection.

- **Have you ensured that monitoring measures the extent to which identified needs and priorities of women and people with disabilities have been met and/or measures the extent to which gender inequalities have changed due to COVID-19?** Speaking with women, and people with disability is a critical component of monitoring which could be more difficult due to the nature of COVID-19. Seeking out female government counterparts, local gender and disability specialists and women's organisations and disabled person's organisations to get their views is imperative. Additional time and resources may be needed for this.

4. Managing the evaluation

- **Does the evaluation plan include sufficient rigour in the methodology and practice?** Ensure the proposed data collection approaches are sufficiently rigorous to answer the evaluation questions. Consider asking someone with evaluation expertise to peer review the evaluation plan and provide this quality assurance.
- **Have you set up regular check ins with the evaluation team leader or evaluation manager to problem solve during the evaluation?** A remote evaluation team may need more support to contact and engage with particular stakeholders or to work with the implementing partner to source data. Regularly checking in on progress with the evaluation team leader or evaluation manager (where the evaluation is being managed by the implementing partner) can help to work through any issues and ensure you are happy with the progress and direction of the evaluation.

An Evaluation of an MFAT Regional Justice Program

MFAT decided to conduct a strategic evaluation of MFAT support to the justice sector in the Pacific in 2020. They engaged an evaluation consulting company to deliver the evaluation with a team of three people based in Canberra, Melbourne and Suva. The original plan had been to visit three countries for face-to-face interviews and consultations and have a workshop and meetings with stakeholders in New Zealand. However, with the COVID restrictions, the evaluation methodology needed to be adapted to accommodate a remote evaluation. The team pivoted to doing remote interviews, including talking to 32 people in NZ and 50 people in 13 Pacific Island countries. To arrange the interviews, an introductory email was sent by MFAT staff and then a follow up email from the evaluation team arranged the interview time and details. The remote interviews used a mixture of Zoom discussions and phone interviews where participants were not familiar or experienced with online platforms. Remote interviewing allowed the team to talk to more people across more countries than the original 3 selected for field work, including the use of snowball sampling to identify other relevant stakeholders. However, it took more time, as stakeholders were busy with COVID responses and the team found that people tended to more frequently cancel or postpone online interviews. As a result, additional days needed to be added for the evaluation to take account of scheduling. It was also a limitation that the evaluation was not able to arrange remote interviews with community groups and beneficiaries in Pacific countries. Networking with civil society organizations to conduct community consultations on behalf of evaluators was identified as an option to plan ahead for in future engagements. The evaluation approach included a participatory "sense making" workshop and there was concern that Pacific Islander voices may not be able to be heard in a large virtual mixed stakeholder meeting. To help manage this, the evaluation held a smaller workshop with just Pacific Islander stakeholders which went well. However, the use of Zoom for this workshop was a challenge for some of the stakeholders who were less comfortable and familiar with online platforms. The evaluation team also experienced some challenges with working together from their different locations, due to some team members' weaker internet connections which made it difficult to engage with them through online meetings. The draft evaluation report was delivered in December 2020, providing insights for MFAT's future justice sector programming in the Pacific. The final report is due in February 2021.

Risks around remote monitoring and evaluation

The following factors were identified through interviews with other donors, development organisations, and implementing partners as potential risks to effective remote monitoring and evaluation. Mitigation strategies to address them are also outlined below.

It is also important to ensure your M&E system aligns with the program’s child protection plan and any risk management plans, including those around managing health risks.

Risk	Risk description	Risk mitigation strategies
<p>Lack of DFAT/ partner willingness to try new M&E approaches</p>	<p>Remote M&E can require the use of new monitoring approaches that DFAT, implementing partners or counterparts are less familiar with. This often requires a willingness to try new approaches and manage the risk that they may not work as expected.</p>	<ul style="list-style-type: none"> • Ensure DFAT senior management understand the risks involved in any new approaches and communicate an agreed willingness to take risks to the implementing partner. • Use this practice note to highlight other examples of where these approaches have been used. • Consider where you can share data or responsibility for data collection with other implementing partners, to share the risk. • Ensure the M&E implementer has access to the right technical expertise to guide implementation of the new approaches. • Agree that the implementation of the remote M&E approach is seen as a learning opportunity, in case the approach isn’t as effective as expected.
<p>Lack of systems and human capacity around remote M&E</p>	<p>The extent to which the implementing partner has the capacity to engage in M&E and knowledge and expertise of remote M&E methods to manage and implement M&E activities can affect how well remote M&E is implemented.</p> <p>A lack of systems to share data between implementing partners in an investment and across programs within DFAT is also a risk as it could lead to duplication of data collection effort.</p>	<ul style="list-style-type: none"> • Be aware of your partners’ capacity, including digital literacy, and encourage them to engage expertise to fill any capacity gaps. • Encourage partners to invest in systems to support the capture, storage and sharing of data, such as a Management Information System (MIS)⁴. • Understand what capacity partners and government counterparts have and where capacity building isn’t possible, match the approaches to their capacity. • Conduct data audits as necessary to determine where there are data gaps or quality issues and consider how to address them. • Try to establish mechanisms to support the sharing of monitoring and performance information between partners and investments.

⁴ A Management Information System is a database for storing programming information such as monitoring and program management information. It allows multiple different program stakeholders to access the database and enter and view data and information, helping with quick data collection, analysis and reviewing.

<p>Lack of national infrastructure or technology to enable remote M&E</p>	<p>Uneven access to digital technology or infrastructure in the country or region threatens the reliability of remote M&E. This could include low internet access, poor internet speeds, poor mobile phone network coverage, or lack of access to computers.</p>	<ul style="list-style-type: none"> • Understand the context and how access to relevant technology and infrastructure varies sub-nationally • See whether those who have access to relevant technologies can assist with data collection from those who can't access it. • Scan for appropriate technology solutions that are designed for developing country settings.
<p>Inadequate program time or budget for monitoring and evaluation</p>	<p>It is often a misconception that remote monitoring and evaluation is less resource intensive. It can require more time to design the data collection methods and tools and to analyse the data. Resources may be needed to purchase the necessary technology.</p>	<ul style="list-style-type: none"> • Consider where data collection responsibilities can be shared across multiple investments or implementing partners to create efficiencies • Focus M&E efforts on the most important data and information. • Consider whether additional resources are needed for the remote M&E. This includes: <ul style="list-style-type: none"> – Extending timelines for data collection when working remotely. – Investing in new technology to support remote M&E methods. – Considering investing in expertise to support remote M&E.
<p>Weak relationships between DFAT, implementing partners and counterparts</p>	<p>Weak relationships can affect the willingness to share information between implementing partners and with DFAT and lead to partners not working effectively together to collect and interpret M&E information. It is more difficult to develop strong relationships and trust when working remotely.</p>	<ul style="list-style-type: none"> • DFAT staff to invest time and effort in building relationships with implementing partners and counterparts, even though it is time consuming. This is particularly important in remote program management. • Set up times for regular project check ins with the implementing partners where you can discuss progress in implementing the project and any management actions.
<p>Inadequate monitoring of gender and social inclusion</p>	<p>Lack of partner capacity and systems to collect and analyse sex-disaggregated data and monitor gender-related risks and impacts can be exacerbated with remote M&E.</p> <p>Uneven access to digital technology by women and people with disability can affect their ability to participate in monitoring activities.</p> <p>Gender and disability issues can be relegated to the background or seen as a lesser priority for partners due to COVID-19 challenges.</p>	<ul style="list-style-type: none"> • Understand who's being missed in remote methods and see whether specific methods or approaches are needed to include them. • Be aware of your partners' capacity to monitor gender-related impacts and encourage them to engage expertise to fill any capacity gaps. • Ensure the M&E implementer has access to the right technical expertise to ensure meaningful attention to gender and social inclusion in the design and implementation of remote monitoring approaches. • Ensure your monitoring approaches are consistent with the Do No Harm principles <ul style="list-style-type: none"> – https://reliefweb.int/report/world/guidance-establishing-remote-monitoring-and-management-gbv-programming-context-covid-19

For additional guidance on managing risks, see the following DFAT Policy and Guidance Notes

[Environmental and Social Safeguard Policy](#)

[Safeguard M&E guidance note](#)

[Managing Safeguard Risks During COVID](#)

[Child protection](#) and [Preventing sexual exploitation, abuse and harassment](#)

DFAT Ethical Research and Evaluation Guidance Note

USAID's Internal Systems to support the Use of Digital and Geospatial Data for Remote Monitoring

USAID has established internal teams focused on Development Informatics and Geospatial data who help support the Agency's priority of increasing the use of digital data in program monitoring. These teams help to gather data that is being collected by development programs, gather data from publicly available and other US Government sources such as satellite data, provide technical support to programs in how to collect and use digital data and gather best practice across the Agency. With the onset of COVID-19, the demand for this expertise increased and the team developed a guidance note to help program staff to understand the remote monitoring options available and what to consider when deciding whether they needed to pivot their program monitoring approaches. They set up a remote monitoring inbox to provide a central point for staff to access the expertise across the team. The team have found that enabling factors to support the collection and use of digital data across USAID development programs include:

USAID contractually collects data from individual projects which is then available for future development programs

- *Clearly documented procedures and policies as to how to weigh up the benefits and risks of this use of data, including how to collect and store data ethically without compromising the privacy of those whose data is being used*
- *having concrete examples of how programs have used digital data combined with technical support helps to promote the use of these techniques as Agency staff can understand different options and what is possible.*
- *An ongoing challenge remains encouraging coordination and reducing duplication of data collection. It can be difficult to establish data working groups and to encourage people to share data.*

CONCLUSION: DOS AND DON'TS IN REMOTE MONITORING

Below is a quick reference guide for remote monitoring which outlines some do's and don'ts when undertaking remote M&E.

In remote monitoring, DO

- *Review your program's theory of change to ensure it is still appropriate (see footnote 4).*
- *Refocus the scope of your data collection to be focused on what is most important and balanced across the M&E purposes of data collection for accountability⁵ and learning⁶.*
- *Invest in understanding your context and looking at what technology is available and could be used for remote monitoring.*
- *Be willing to try new data collection methods and approaches.*
- *Build local M&E capacity, including partner government capacity in remote data collection (including through capabilities and partnerships).*
- *Engage expertise in the data collection method you want to use. If planning to do data science or analysis, engaging expertise in big data can be very useful.*
- *Check whether women, people with disability and marginalised groups are being represented. Understand who's being missed in remote methods and see whether specific methods are needed to include them.*
- *Allow more time to set up remote monitoring data collection systems. Investing in management information systems (MIS) that partners can input data to and can store monitoring data are particularly valuable.*
- *Ensure the program's risk management systems are sufficiently strong to manage remote monitoring risks.*
- *Invest in building relationships with partners and spend time triangulating and interpreting data with them. Remote working means you need to spend more time and effort building relationships with partners. Interpreting remotely collected data effectively requires joint interpretation with the partners on the ground who know the context.*
- *Promote monitoring information sharing across DFAT investments and with other partners.*
- *Engage in more frequent check-ins which could include collecting data more frequently or having data interpretation sessions with implementing partners more regularly. They can also provide updates on any important context changes the program needs to respond to.*
- *Use shared tools such as dashboards, and standardised checklists and templates to ensure consistency of data collection and sharing amongst partners.*
- *Consistently reflect on what is and isn't working in remote monitoring and update your approach.*

⁵ The accountability purpose of M&E is around proving to the donor that the program has delivered and achieved what it said it would.

⁶ The learning purpose of M&E focuses on collecting data to help understand how effectively the program is creating change and why to help continuously improve the program.

In remote monitoring, DON'T

- ***Expect that you can directly replace all face-to-face data collection methods with remote data collection methods.*** You may need to change the scope of the information you collect, use multiple methods to collect what you need or agree to reduce the quality of your monitoring data. It is important to constantly review your remote monitoring approaches to see if improvements can be made.
- ***Underestimate the time needed to manage remote monitoring and build partner capacity.*** Don't think that remote monitoring is always more efficient. While the data collection process can be faster, establishing the data collection system and analysing the findings can be more time consuming.
- ***Assume that gender equality and social inclusion will be effectively monitored.*** In times of crisis, gender equality and social inclusion issues are often relegated to the background or a lesser priority for partners. Specific attention will be needed in the design and implementation of remote monitoring to ensure it measures the extent to which identified needs and priorities of women, girls and people with disability are met and/or gender inequalities have changed as a result of COVID-19.


WHERE CAN I GET HELP WITH REMOTE M&E?

For further support please contact ACD: designmail@dfat.gov.au and the OCE Evaluations Unit: developmentevaluation@dfat.gov.au

ANNEX 1: THE ‘HOW’- REMOTE M&E METHODS

Method	When to use this method	Advantages	Disadvantages	Examples	Further resources
<p>Mobile Survey Data Collection Tools, such as SMS</p>	<p>SMS data collection can be used to collect basic data (i.e. a small number of targeted questions) from a large population.</p> <p>There are other mobile data collection methods such as Mobile Acquired Data</p> <p>Does not fully replace face-to-face engagement as it does not allow for in-depth discussions about particular topics.</p>	<ul style="list-style-type: none"> • Can provide anonymity • Can conduct with large sample sizes • Sending out bulk information • Could be a good method to engage with marginalised groups as isn't reliant on having a sophisticated smart phone and can be done with almost any type of phone. 	<ul style="list-style-type: none"> • Relies on already having phone numbers of target group • Privacy considerations- networks may be Government controlled or data may be intercepted • Relies on good signal, electricity to charge the phone • Phone numbers may change constantly • Anonymity of who is participating- hard to check if reaching the target recipient • Relies on good literacy and technology capability levels • Data may be skewed to those with access to mobile phones • Need to consider how to obtain formal consent of participants to provide their information. 	<p>Beneficiary surveys using SMS</p> <p>World Vision in the US, working with partners INTRAC and Social Impact LA have developed an SMS based feedback system which allows beneficiaries to provide feedback on services, such as health services. The app was also structured to allow for the registration of 'missed calls' which would then mean that someone would phone the beneficiary instead. This was an approach to be used where literacy levels were low. However, through experience they found that beneficiaries would often use an intermediary, such as their children, to help them provide their feedback through SMS. They found that in some contexts, although phone ownership among women was low, they were easily able to use other people's phones to provide feedback and that this was culturally acceptable, helping to access more marginalised groups. For further information, see https://www.worldvision.org.uk/files/3514/6056/3545/SIMLab1.pdf and http://feedbackmechanisms.org/public/files/Zimbabwe.pdf</p>	<p>https://www.fhi360.org/sites/default/files/media/documents/Paper_to_Mobile_Data_Collection_Manual_1.0.pdf</p> <p>https://aci-ar.gov.au/publication/technical-publications/mobile-acquired-data-transformative-agriculture-and-enterprise-development-program-mad</p>
<p>Phone Surveys (including Computer Assisted Telephone Interviewing or CATI)</p>	<p>Can be used for data collection across a large population. It requires a large number of data collectors (enumerators) to make phone calls and conduct interviews. It is a closer replacement for face-to-face interviews than surveys or SMS data collection as it allows the interviewer to build rapport and have more in-depth discussions.</p>	<ul style="list-style-type: none"> • Does not require a high level of literacy • Can provide anonymity • Higher amount of accuracy in who is participating than SMS surveys 	<ul style="list-style-type: none"> • Relies on already having phone numbers of target group • Privacy considerations • Risk for vulnerable populations where conversations could be overheard about sensitive topics • Time consuming as need to call many people to find enough who are willing to complete the survey • Lower response rates • Have to narrow scope of data collection as people may disengage quickly • Difficult to establish trust over the phone and then to discuss sensitive issues or provide personal information • May involve a cost to participants which they should be compensated for • Data may be skewed to those with access to mobile phones and marginalised populations may be missed 	<p>Phone surveys in the PRISMA program in Indonesia</p> <p>With the COVID-19 pandemic, the Australia Indonesia Partnership for Promoting Rural Incomes through Support for Markets in Agriculture (PRISMA) had to switch from field-based interviews of farmers to phone interviews. While they found they were able to collect much of the same information, they experienced several challenges:</p> <ul style="list-style-type: none"> • Difficulties sourcing phone numbers for the farmers; • Had a 30-40% response rate. Farmers were more likely to say no to being interviewed over the phone than face to face; • Interviews were not able to gather as much information. Farmers wanted to talk for less time on the phone; • More difficult to discuss sensitive issues such as gender. Less trust established over the phone than face-to-face. 	<p>https://www.fhi360.org/sites/default/files/media/documents/Paper_to_Mobile_Data_Collection_Manual_1.0.pdf</p> <p>https://www.odi.org/sites/odi.org.uk/files/resource-documents/primary_data_collection_emerging_analysis_and_ideas_1.pdf</p> <p>https://www.povertyactionlab.org/blog/3-20-20/best-practices-conducting-phone-surveys</p> <p>https://www.odi.org/sites/odi.org.uk/files/resource-documents/primary_data_collection_emerging_analysis_and_ideas_1.pdf</p>

<p>Mobile apps for Two-Way communication (Messenger, WhatsApp, Slack, WeChat, IMO, Skype, Line)</p>	<p>Mobile apps can work in a similar way to SMS data collection. They allow for the provision of discrete pieces of data, such as output numbers or the answer to some defined questions.</p> <p>They are closest to a survey, but only allow for a very limited scope of data collection</p>	<ul style="list-style-type: none"> • Responsive • Can use group chat for a focus group or participant interviews • Most apps free to use • Can use from computer to smartphone • Some (e.g. WhatsApp) have good security encryption • WhatsApp numbers remain constant through international borders and networks 	<ul style="list-style-type: none"> • Privacy considerations (who owns the platform and how they manage privacy) • Anonymity of who is participating • Requires good data signal • Relies on good literacy and technology capability levels • Data may be skewed to those with access to mobile phones • Need to consider how to obtain formal consent of participants to provide their information. 	<p>Use of Whatsapp in an IADB development project in Bolivia</p> <p>In water and sanitation programs being funded by IADB, Whatsapp has been used to support program implementation and to collect real time monitoring data. Coverage indicators on access to improved sanitation and safe water programs are monitored frequently. Staff need to report progress on toilet construction in communities to their regional supervisors. Survey apps do a good job of tracking these indicators. However, when in doubt, supervisors often double check information via chat applications such as whatsapp.</p> <p>https://blogs.iadb.org/efectividad-desarrollo/en/whatsapp-a-tool-for-development-work-in-bolivia/</p>	
<p>Videoconferencing</p>	<p>Videoconferencing could be a potential option for:</p> <ul style="list-style-type: none"> - Focus group discussions and Participant interviews, particularly where all the participants aren't co-located or social distancing is required - To test and validate findings with program stakeholders as a replacement for workshops. 	<ul style="list-style-type: none"> • High level of interactivity and participation • Use of breakout groups for interaction and brainstorming • Getting high-quality, rich data • Availability for recording 	<ul style="list-style-type: none"> • Large videoconferences or workshops via Videocon are often far less engaging than face-to-face. More individual or small group videocons may deliver better data, but may also be more time consuming. • Privacy considerations • Requires good data signal • Relies on good technology capability levels • Requires a good facilitator (or multiple facilitators) to keep engaging and allowing all participants a voice • Data may be skewed to those with access to the necessary technology 	<p>Use of Videoconferencing for virtual interviews in a remote evaluation</p> <p>In a remote evaluation of a DFAT funded program of support to ASEAN, videoconferencing was used for the interviews of all key informants. The evaluation team had two members in two different locations and interviewed people across multiple different countries using videoconferencing platforms such as Zoom, Microsoft Teams and Webex. The videoconferencing allowed the evaluators to build some rapport with those they were interviewing and through a video link have a closer connection with the interviewees, helping to improve the quality of data.</p>	<p>https://www.odi.org/sites/odi.org.uk/files/resource-documents/primary_data_collection_emerging_analysis_and_ideas_1.pdf</p> <p>https://www.quirkos.com/blog/post/online-interviews-focus-groups-qualitative-research</p> <p>https://www.sutherlandlabs.com/blog/global-tips-for-conducting-remote-focus-groups-during-covid-19/</p>
<p>Web surveys</p>	<p>These can be a replacement for structured interviews or paper survey forms. However the scope of data collection may need to be reduced as people are less likely to spend a long time on web surveys compared to face to face interviewing.</p>	<ul style="list-style-type: none"> • Can be conducted from multiple devices • Can provide anonymity • Can collect data from a big population • Often easier to analyse data using survey software 	<ul style="list-style-type: none"> • Data privacy may not be guaranteed, depending on the platform • Requires a certain level of technological capability and overall literacy • Anonymity of who is participating may not be guaranteed • Data may be skewed to those with access to the necessary technology, with limited participation by marginalised groups • Need to consider how to obtain formal consent of participants to provide their information. 	<p>Online surveys as part of program monitoring in Cambodia</p> <p>The M&E system for a program in Cambodia includes an annual survey of the strength of partnerships between the different program partners. For the CSO partners and program implementers, the survey is conducted online, with a company contracted to deliver the survey using their software which is compatible with the Khmer language. Online survey delivery provides the participants with privacy to answer the questions, some of which are sensitive, although it is clear that the responses are not anonymous to the survey company. It has proven effective during COVID, where many of the program partners are working remotely. It is also a more efficient way to aggregate the survey results.</p>	<p>https://www.fhi360.org/sites/default/files/media/documents/Paper to Mobile Data Collection Manual 1.0.pdf</p> <p>https://60decibels.com/user/pages/03.Work/ remote survey toolkit/60 Decibels Remote S urvey Toolkit March 2020.pdf</p>
<p>Media Content Analysis</p>	<p>This could be a good option for context monitoring or as part of</p>	<ul style="list-style-type: none"> • Straightforward to collect and analyse data 	<ul style="list-style-type: none"> • Generally only available for activity or output level data 	<p>Media monitoring in Indonesia</p>	

	monitoring the uptake of research findings or policy recommendations.		<ul style="list-style-type: none"> • May require a paid subscription to a service which can review a large range of media for particular search terms. 	The Knowledge Sector Initiative (KSI) program in Indonesia aims to ensure Indonesian public policy is grounded in evidence and promotes more inclusive and equitable growth. Once COVID 19 emerged, KSI invested more in media monitoring as part of context and effectiveness monitoring. They wanted to understand how Government of Indonesia policy was changing in response to COVID, and also to see where KSI research was being picked up and included in public policy	
Social media for private groups (e.g. Private Facebook groups)	Could provide a good forum for engaging with a targeted group of stakeholders. It could be an option which replaces focus groups, as participants can virtually ‘talk’ amongst themselves and further develop ideas from each other.	<ul style="list-style-type: none"> • High level of interactivity and participation • Getting high-quality, rich data 	<ul style="list-style-type: none"> • Privacy considerations in accessing private groups- need to ensure that participants know what the information will be used for • Requires good data signal • Relies on good technology capability levels • Requires certain literacy levels • Data may be skewed to those with access to the necessary technology or younger people who are bigger users of social media • Need to consider how to obtain formal consent of participants to provide their information. 		https://assets.publishing.service.gov.uk/media/57d968c540f0b6533a000052/Social_Media_DFD_Practice_Note_PDF_September_2016_Emily_Poskett.pdf
Use of online software for whiteboards (such as Lucidchart, Miro, Mural, Trello, Monday, Jamboard)* *note that you would use this in conjunction with videoconferencing or two-way communication software	These can be a great way to do joint, participatory work remotely and try and approximate participatory workshops. They could be used to review theories of change or to jointly review monitoring data or evaluation findings and interpret the results and develop recommendations.	<ul style="list-style-type: none"> • Interactive and participatory • Getting rich data 	<ul style="list-style-type: none"> • Privacy considerations • Can be expensive to subscribe to the platforms • Requires good data signal • Relied on good technology capability levels • Requires certain literacy levels • Data may be skewed to those with access to the necessary technology 	Virtual workshop using Google Jamboard A workshop was being scheduled to discuss learnings around remote M&E and involved up to 25 participants from multiple countries and locations. A Google Jamboard was set up with the key questions to be discussed in the workshop to provide a visual cue as people gave answers to the questions and also so people could write answers themselves directly in the workshop where everyone could see. It then provided a shared written record of the results of the discussion.	See Annex 4 for tips around running a virtual workshop.
Satellite Imagery	Satellite imagery can be very useful to gather visual data of difficult to access locations. It can be particularly valuable in humanitarian disasters to understand where infrastructure is located, to monitor people movements and refugee flows and to understand geographical terrain. It can therefore provide both contextual information and useful monitoring data.	<ul style="list-style-type: none"> • Can pinpoint works for accountability measures • May allow for fast, real time data • Could be used for geomapping and context monitoring • Some satellite data is free or owned by partners who may be willing to share 	<ul style="list-style-type: none"> • Privacy considerations • May be expensive if you need to pay to access the data • May be difficult to access • May be a time lag between taking the image and the image being made available • May be affected by cloud cover (e.g. not suitable for monsoonal conditions) • Raw data requires visual interpretation and/or technical analysis to facilitate interpretation by persons with an 	KIAT’s use of satellite imagery in Indonesia to monitor economic activity The Australia Indonesia Partnership for Economic Development (PROSPERA) investment in Indonesia wanted to monitor changes in economic activity. They purchased the right to access satellite data through which they could monitor levels of lighting in target cities, and make an assessment about economic activity.	

	It can help to capture some of the information you would normally collect during a site visit.		<p>in-depth understanding of local context. Images do not provide information on the causes of captured events.</p> <ul style="list-style-type: none"> • May need technical advice to know where to access satellite data 		
Drones	<p>Drones can be used to visually confirm the position and status of infrastructure or to look at geographical terrain or people movements. They can also be used for environmental monitoring. You can also use cameras mounted on drones to provide real time images of sites.</p> <p>It can help to capture some of the information you would normally collect during a site visit.</p>	<ul style="list-style-type: none"> • Can pinpoint works for accountability measures • Allows visual look at sites which can't be visited • Can be useful for context monitoring, such as population movements, displacement or resettlement monitoring 	<ul style="list-style-type: none"> • Privacy considerations • May not be legally possible • Invasive • Expensive • Can be limited by weather such as clouds or dense vegetation cover • Can have limitations from radius of operation • May be dangerous in conflict areas- seen as a threat • Doesn't allow assessment of quality of infrastructure • Requires appropriate skills to interpret photos and read in the context of the local environment 	<p>Use of drones to guide responses in humanitarian disasters</p> <p>Using drones to map an area is also becoming gaining traction in post-disaster zones. Drones are sent out to capture images and gather data which aid workers then use to help plan reconstruction and relief efforts. The company Pix4d produced a software that is used by non-profit organisation Drone Adventures, who have used the platform, to create 3D models of the landscape following the 2011 nuclear disaster in Fukushima and the 2010 earthquake in Haiti.</p> <p>https://en.reset.org/knowledge/drones-propelling-sustainable-development-08042015</p>	<p>https://www.betterevaluation.org/sites/default/files/Drones%20in%20Humanitarian%20Action.pdf</p> <p>https://reliefweb.int/report/world/how-use-drones-development-projects</p> <p>https://irevolution.files.wordpress.com/2014/07/unmanned-aerial-vehicles-in-humanitarian-response-ocha-july-2014.pdf</p> <p>https://www.dfat.gov.au/sites/default/files/safeguard-guidance-note-displacement-and-resettlement-collecting-resettlement-data.pdf</p>
Geomapping/ Geotagging (including photos or videos with geotagging)	<p>Can provide visual images of areas, allowing tracking of infrastructure, geographical features of land, and people movements.</p> <p>It can help to capture some of the information you would normally collect during a site visit.</p>	<ul style="list-style-type: none"> • Can pinpoint locations of participants for accountability • Provide visual confirmation of particular activities • GPS data is available in any weather/climatic conditions, network access is free 	<ul style="list-style-type: none"> • Privacy considerations • Potential security risks for beneficiaries or those involved in the collection and transmission of images • May be expensive • Taking photos of some groups (e.g. women, children or ethnic minorities) may be inappropriate • Requires appropriate skills to interpret photos and read in the context of the local environment • Need to consider how to obtain formal consent of participants to provide their information. 	<p>ESIP PNG- use of geotagged data for program monitoring</p> <p>The Economic and Social Infrastructure Program (ESIP) in PNG supports the construction of infrastructure such as phone and internet lines. Instead of needing to make physical visits to sites where infrastructure has been installed, which is costly and difficult to do during the COVID-19 pandemic, they will use Field Task (a mobile phone data collection app) to support monitoring data collection. This would allow people who are installing infrastructure to take a photo which is tagged with GPS coordinates and record basic data about their activities, such as demographics of the beneficiaries, intended use of the unit, and completion of a training checklist. The GPS coordinates provide more certainty that the infrastructure has been installed in the specified location and the phones provide a way of generally assessing whether construction has been completed and the quality of construction. The GPS coordinates will also facilitate follow-up visits by maintenance professionals and researchers, who may otherwise have difficulty locating households.</p>	<p>Potential resources for geomapping include:</p> <p>Open Street Map: https://www.openstreetmap.org/about</p> <p>Geospark: https://www.geospark.io/</p> <p>For geotagging of photos and videos, consider Field Task</p>
Big Data such as mobile phone and banking data	<p>Big Data can provide a way to monitor against some key indicators over a large population. It can be less invasive than surveying a population as it doesn't require any engagement with beneficiaries. However you will</p>	<ul style="list-style-type: none"> • May be best option where other options aren't possible • Can provide real-time awareness of events and real-time feedback on a situation • Can be less invasive- doesn't require any engagement or time from beneficiaries. 	<ul style="list-style-type: none"> • May be difficult to access this data from companies • Privacy and security considerations • Data quality may be compromised • Data may not match M&E needs • Timeframe may not be ideal 	<p>Analysis of big data as part of program monitoring</p> <p>Pulse Lab Jakarta worked with the Indonesian Ministry of Health, the Ministry of National Development Planning, UNICEF and WHO to examine public perceptions of immunisation using social media. The project examined how analysis of social media data could be used to understand public perceptions of immunisation. Pulse Lab Jakarta filtered tweets for relevant conversations about vaccines and immunisation. The findings included the identification of perception</p>	<p>Companies/ organisations who can support big data collection and analysis include:</p> <p>Pulse Lab (Jakarta based)</p> <p>Premise (US based)</p> <p>An ethics guide for M&E using Big Data is available here</p>

	probably need to engage expertise to help with conducting the analysis of the data.		<ul style="list-style-type: none"> • Data may be skewed to those with access to mobile phones and formal banking systems • May need to contract technical support to analyse the data • Need to consider how to obtain formal consent of participants to provide their information. 	<p>trends, including concerns about religious issues, disease outbreaks, side effects and the launch of a new vaccine. The real-time monitoring of social media helped to understand how misinformation and rumours were being spread and combined with knowledge of public opinion helped to guide responses to immunisation rumours. For more information see https://www.unglobalpulse.org/wp-content/uploads/old_site/UNGP_ProjectSeries_Perception_Immunisation_2014_0.pdf</p> <p>Also see case study on Afghanistan and use of big data in Annex 4.</p>	
Photovoice	<p>This approach allows beneficiaries to document the changes a program makes in their lives. They are provided with a camera or video camera and encouraged to take photos/videos to document their response to specified monitoring questions.</p> <p>It can be an alternative to in-depth interviewing or developing case studies.</p>	<ul style="list-style-type: none"> • Empowers beneficiaries to tell their story 	<ul style="list-style-type: none"> • Requires technology to take a photo • Unsure if the location is accurate • Need to consider child protection and privacy implications. 	<p>Use of Photovoice in the evaluation of a Community Health Initiative</p> <p>Photovoice was used as a participatory evaluation method in a Community Health Initiative, a 6-year, multisite community-based obesity prevention initiative. Fifty community participants, including six youth, from six Community Health Initiative communities used photos and captions to identify, from their perspective, the most significant accomplishments from the initiative at both baseline and follow-up. Accomplishments identified included increased access to fresh/healthy food in local neighbourhoods, policy changes supporting a ‘healthy eating, active living’ community and increased access to physical activity.</p> <p>https://pubmed.ncbi.nlm.nih.gov/23159999/</p>	<p>https://www.betterevaluation.org/en/evaluation-options/photovoice</p>

Other Useful Remote M&E Resources

On adapting M&E plans for COVID-19 reality: https://www.odi.org/sites/odi.org.uk/files/resource-documents/odi-ml-mel4am-adaptingdatacollection-bn-sep20-final_3.pdf

On adopting remote monitoring approaches during COVID-19 <https://www.usaid.gov/digital-development/covid19-remote-monitoring-guide>

On engaging with marginalised groups: https://reliefweb.int/sites/reliefweb.int/files/resources/COVID-19_CommunityEngagement_130320.pdf

On researching violence against women during the COVID-19 pandemic: <https://www.svri.org/sites/default/files/attachments/2020-07-23/SVRI%20Knowledge%20Exchange%20-%20Research%20VAW%20COVID%20-%20Final.pdf>

ANNEX 2: THE ‘WHO’ - REMOTE M&E RESPONSIBILITIES

Remote data collection approach	When to use the approach	Benefits of the approach	Challenges of the approach	Examples	Resources
Monitoring by other donors or implementing partners (Peer Monitoring)	Monitoring by other donors of development partners could be used where they agree to share data they are already collecting, or where they include your questions in existing data collection processes. It can only be used where there are donors who are able to collect the right data or share data with you. It is more relevant for multilateral or multi-donor/consortium programs.	<ul style="list-style-type: none"> • Sharing of learning, team building, sharing of technical capacity • Other partners are familiar with the local context • Larger donors in a country may have greater M&E capacity which DFAT can leverage • Opportunity for a fresh perspective 	<ul style="list-style-type: none"> • Requires coordination; can be time consuming • Other donors may use different metrics or monitoring systems • Reliability is based on monitors’ impartiality- may be incentives for implementing partners to be selective about the information they present • Potential reduced transaction costs of multiple donor systems for partners/partner governments 	<p>USAID: Donor coordination around monitoring in Ethiopia</p> <p>To understand the food security and socio-economic impacts of the COVID-19 crisis, USAID/Ethiopia has developed a community of practice with DFID, NGO partners, World Bank and IFPRI. They have regular check-in calls to coordinate data collection efforts. To harmonize data collection efforts, USAID/Ethiopia started by adding a small number of new questions to activity phone surveys. They then shared these questions with other organisations to reuse. Organisations that had already collected beneficiaries’ phone numbers through their activities were able to move quickly. They identified the percentage of beneficiaries they had contact numbers for in different areas of operation. This allowed the community of practice to interview a subset of beneficiaries across the country. Due to the COVID-19 crisis, some donor-funded activities had been paused or delayed. The phone surveys are helping partners understand how they need to adapt their activities to meet the changing needs of the population.⁷</p>	
Contracting local M&E experts or data collectors (Third-party monitoring-TPM)	Contracting third parties who are independent for data collection can be extremely useful for providing independently verifiable data. They must therefore be contracted directly by DFAT, not sub-contracted by DFAT’s implementing partners as this independence can be compromised. However an exception is in the case of a multi-donor trust fund, where the trust fund manager may contract the third parties. These third parties who you can work with could include contracted research or monitoring service providers, NGOs and research organisations such as universities.	<ul style="list-style-type: none"> • Provides independent ‘eyes and ears; on the ground where program staff cannot go • Allows the validation of data where implementing partner reporting is not trusted • Is most useful for verifying quantitative and physical outputs of aid projects • Local M&E contractors, universities and NGOs may have existing relationships with beneficiaries and be more trusted • Third parties often have a better understanding of local context and local language skills 	<ul style="list-style-type: none"> • Commissioners often underestimate the resources required to manage TPM • Need to have internal capacity to internally determine data needs and develop data collection tools and approaches which are then contracted to a party to deliver. • Partner may require close supervision and capacity building which may need to be delivered remotely • Smaller countries may not have local partners, particularly in the Pacific • Partner may not have contacts with the right target group 	<p>Afghanistan Case Study: Use of third-party monitoring</p> <p>Australia is one of 34 donors who contribute to the Afghanistan Reconstruction Trust Fund (ARTF), the largest single source of on-budget financing for Afghanistan’s development. It is administered by the World Bank. In Afghanistan, security restrictions limit the travel Australian Embassy staff can do. However, by contributing to the ARTF, Australia benefits from the remote monitoring arrangements that the World Bank have in place. This includes the use of Third Party Monitoring (TPM). The Bank has a contract with a local company who provides TPM, including collecting baseline information and producing quarterly monitoring reports which cover physical and financial monitoring. This is an important mechanism for collecting independent monitoring</p>	<p>http://www.i-aps.com/pdf/Guidelines-for-Adapting-Third-Party-Monitoring-in-The-Context-Of-The-Covid-19-Outbreak.pdf</p> <p>In a humanitarian context: https://www.shareweb.ch/site/Pover ty-Wellbeing/resources/Documents/SD C-IDS%20BriefingNote%2010_LSida_and_LOakley.pdf</p>

⁷ USAID Guide for Adopting Remote Monitoring Approaches During COVID-19, May 2020

	<p>Considerations for working with each group is presented below.</p>	<ul style="list-style-type: none"> • Third parties often have better cultural competency • Engaging third parties contribute to localisation • Builds local capacity • Better access to marginalised groups and those without access to technology 	<ul style="list-style-type: none"> • Quality of data collected may be lower and reporting poor • Partner may have connections to the community, compromising the independence of the information • Partners may face political or access constraints in particular areas • Partner may need capacity building to effectively engage with women and address gender equality and social inclusion in monitoring 	<p>information about activities under the Trust Fund within Australia’s security limitations.</p> <p>For further information see https://www.artf.af/</p>
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ANNEX 3: IMPLEMENTING PARTNER STEPS IN REVIEWING THEIR PROJECT'S M&E SYSTEM

1. Scope out or review your information needs

If developing a new monitoring plan, work with other program partners and key stakeholders to scope out the information you need to collect as part of the monitoring plan. Engage with your DFAT activity manager as to their information needs and any contractual requirements for M&E.

If reviewing an existing monitoring system and adjusting it for the COVID-19 context, review the information needs identified previously and consider which existing data collection methods are no longer possible or won't deliver reliable and accurate data. Consider if different or additional data is needed to effectively monitor the differential impacts of COVID-19 on men, women and people with disabilities and the effectiveness of DFAT's response to these needs.

Ensure with DFAT activity manager that the program's Theory of Change is still relevant.

2. Invest in understanding your context- and the populations you're collecting data from

Understanding your context is critical to making decisions about which remote monitoring methods and approaches are appropriate. For the populations and locations, you need to collect data from work with partners and stakeholders who are on the ground to try and understand what is possible and the different technologies available to the populations you would like to reach. Consider issues such as:

- Literacy levels and local language within those populations
- Technology accessibility in those geographic locations and amongst the populations (e.g. mobile phone coverage)
- Capability to use the technology in the target population
- Internet access and strength of internet in your target geographic locations
- Applicability of different methodologies to the local context and local market i.e. short internet or phone surveys, participant interviews, virtual workshops, third party monitors
- Whether there are local researchers, consultants or companies available in your country and to what extent they are able to access your geographic areas and have relationships with the relevant populations
- Whether there are other partners who can help with data collection and building relationships with beneficiaries, such as Disabled People's Organisations (DPOs), NGOs, or local community groups

3. Ensure your scope of data collection matches the budget, time and resources available

It can be a misconception that remote monitoring is less resource intensive.

Field visits involve clear boundaries of time and geographic location. Working remotely can lead to an expanded scope of data collection, requiring more time and resources. It is also often more time consuming to plan for monitoring activities, design data collection instruments and methods, source and engage participants in data collection activities remotely, and prepare in advance for facilitating virtual workshops. You may require access to particular technical resources, such as technology systems, expertise around data and analysis or experienced remote data collectors (sometimes called enumerators). If you have partners doing data collection for you, these partners may require capacity building support which can be time consuming to provide remotely- but has the benefit of a longer-term capacity dividend. If you are working with newer partners, you will need to conduct due diligence before contracting them to manage risks around fraud and child protection. They may be less familiar with DFAT standards and therefore require additional time, resources and support to comply with DFAT's expectations.

- Consider the resources you have available and what remote monitoring approaches and methods are therefore possible. Check with your DFAT activity manager for any budget considerations that need to be considered.
- Seek technical advice from people who are experienced with the approaches and methods you are planning to use and can advise on the costs and time required to set these up.
- Ensure you have allocated sufficient time to trial the approach beforehand in order to identify and address any issues or misunderstandings with the data collection method.

Check that the risk management strategies in place are appropriate for your updated M&E system.

4. Choose the most appropriate data collection approaches for your program

Liaise with your DFAT activity manager as to whether other DFAT programs or other development partners and see whether they are collecting any similar data which they can share with you or whether they are able to collect any data on your behalf as they work with similar populations and have an existing data collection process in place (for peer monitoring). Decide who is best placed to do data collection, and whether data is best collected by:

- Other project implementing partners
- The partner government
- The beneficiaries themselves
- Other community members on behalf of the program

5. Choose the most appropriate remote data collection methods (the 'how') based on the table in Annex 1, considering risks and ethical considerations

Remote monitoring involves a number of risks, including around the quality of data which can be collected and risks from working with partners or contracted monitoring service providers. These approaches can also involve particular ethical challenges which need to be managed. If you are considering still doing some face-to-face data collection, consider the risk the participant or researcher might put themselves in by participating in the data collection activity and potential child protection risks which need to be managed. For example:

- The time burden of a data collection activity may increase pressure on individuals who are already facing many pandemic-related stressors (e.g. mental health, increased workload, childcare concerns, loss of family members' employment)
- Be conscious of privacy of information. Consider who may be listening in on phone or virtual interviews. If you are talking to women, children or other vulnerable groups, or if your discussion is of a sensitive nature, there may be a risk of harm to the participants if they are overheard
- Data privacy and security need to be considered and specific measures may need to be implemented to ensure the privacy of data collected through some forms of technology
- Ensure that the data collection activity complies with the project's child protection policies and practices

6. Consider how to ensure women, people with disability and marginalised groups are represented as relevant

Certain groups are likely to be underrepresented in remote data collection due to limited access to technologies or capacity to use those technologies e.g. women, people with disabilities and people in more remote areas. For example, the literature has found that both phone surveys and social media data tend to

skew samples towards young, urban males.⁸ In virtual meetings and videoconferences, it is easier for ‘louder’ voices to dominate and not everyone to be heard. Women may also be underrepresented in decision-making and as evaluators and enumerators in local data collection teams. Strategies to address this include:

- Working with partners who have existing relationships with marginalised populations (e.g. DPOs for people with disabilities)
- Instead of interviewing large samples of marginalised populations, focusing on interviewing advocates and representatives from those groups
- Where it is difficult to target sampling, a technique called ‘snowball’ sampling could be useful- where you add a survey question or statement asking people to pass the survey link on to others who may be interested/ know of anyone else who would like to participate in an interview
- Have separate virtual meetings or consultations with smaller groups to better engage ‘quieter’ voices.
- Consult with gender, disability and social inclusion experts when developing TORs for new or modified remote monitoring approaches
- Include women and a focus on diversity as part of local evaluation and data collection teams

7. Invest in the triangulation and interpretation of remote monitoring data

When collecting data, plan for triangulation (e.g. Gathering data on the same topic from multiple sources/using multiple methods). This helps to address any limitations of different data collection methods and approaches by taking advantage of their different strengths (i.e. more breadth and/or more depth of data). Also consider more frequent data collection and work closely with program implementing partners as part of frequent feedback loops.

For example, supplement internet or SMS surveys of a large sample with some more in-depth phone interviews by a contracted data collection company provider if possible. This also provides a ‘Plan B’ if the preferred method does not work or there is a context change and the preferred method is no longer possible.

Work closely with DFAT and your implementing partners, such as through regular workshops, to jointly discuss the monitoring data you are receiving and check with them that it is accurate and discuss what it means for program implementation. See the tips for conducting effective virtual workshops in Table 1 for support on how to do joint interpretation of data with program partners.

⁸ ODI’s Briefing Note *Adapting data collection and utilisation to a Covid-19 reality, Monitoring, evaluation and learning approaches for adaptive management*, comments that Mobile phone surveys tend to over-represent young, male, urban and educated people, as shown by research in Nigeria (Lau et al., 2019) and Ghana (L’Engle et al., 2018).

ANNEX 4: REMOTE M&E CASE STUDIES

Afghanistan case study: Community member monitoring and the use of big data

Afghanistan is one of the most difficult environments in which Australia delivers aid. The ongoing conflict limits our options for delivering and monitoring investments and our ability to demonstrate results. Finding effective ways of monitoring and evaluating (M&E) our programs in this challenging environment is an ongoing priority.

1. Pivoting during COVID: Engaging community members to do monitoring.

Australia has supported girls' education in rural and remote areas of Afghanistan since 2011 through the **Empowerment through Education (EEA) program (\$20.7 million 2011-20)** delivered by CARE. The Investment aims to provide greater access to quality basic education for school-aged girls and boys in remote and rural communities that fall outside of the Afghan Government education system. As COVID-19 travel restrictions, lockdowns and school closures were implemented throughout Afghanistan the EEA project pivoted to ensure continued support for beneficiaries.

Community based education (CBE) Teachers received a monthly stipend of AFN500 (USD6.50) for communication costs to have regular phone contact with students and their parents regarding students' distance and home learning activities. These communication costs were essential for enabling teachers to report students distance and home learning activities, as well as health issues, back to project staff for their guidance & feedback.

CARE provided remote training via phone to village education committee (VEC) members so they could better support remote learning and assist with data collection for remote monitoring. These community mobilisation efforts proved highly successful. The project was able to deliver and report on results in a timely manner. This access to timely information and ability to conduct rapid assessments in a restrictive environment enabled the program to secure an additional grant for the provision of remote learning tools (i.e. radios) and PPE for beneficiaries and target communities.

2. A project to explore options to use big data to monitor women's economic empowerment.

In early 2019, DFAT's Afghanistan Development Section and InnovationXchange sought to explore options for remote monitoring and evaluation in Afghanistan to combat the challenges of working in a complex and restrictive environment. The project wanted to explore whether by harnessing technology, DFAT and other development partners could overcome security and remote area challenges to better gauge progress in the day-to-day lives of Afghan women. This included considering their social mobility; access to finance; and participation in public life and the labour market. Following a technical feasibility study on the potential use of Big Data sources - such as mobile phone and banking data – to measure women's empowerment, DFAT partnered with the Aga Khan Foundation (AKF) and The Ethics Centre (Dr Simon Longstaff AO, a leading international expert, based in Sydney) to explore the idea further.

AKF's strong links to Roshan telecommunications (one of Afghanistan's major telecommunications companies), and to the First Micro Finance Bank (FMFB) of Afghanistan have been invaluable to the early

successes of the project. AKF convened an impressive range of experts to support implementation. In particular, the high calibre data scientist and data engineer have propelled the project forward to exceed initial expectations.

While a set of proxy indicators for measuring women's empowerment will take time, there are some encouraging early results:

- An ethical framework developed under this project has proven to be highly effective *to ensure best practice ethics around the use of data*. Significant resources were allocated to establishing the framework and training committee members and project staff on its application, but this work paid off. The committee has proven to work effectively ensuring sensitive information is collected, stored, and analysed with the highest ethical standards. This framework can be found [here](#).
- A legal review of international standards for working with big data and associated guiding principles show complementarity to the operations of the ethics committee. A more formal mapping of the interactions of these two frameworks is expected to show that the application of the ethical framework will also ensure adherence to international best practice on the handling and use of Big Data.
- One of the key issues to overcome has been sex disaggregation of mobile data. This information is not collected from the customer; however, it is essential to conducting the gendered analysis required. While there is further work required to test and refine, the project currently has a machine learning (AI) model using 'call data records' to predict the sex of a mobile user with 78 per cent accuracy. A foundational research review showed that the current state of the art accuracy for similar machine learning models is 79.7 per cent.

In addition to further testing and refinement deeper exploration of the insights and ground truthing of key assumptions are required to refine our hypothesis taking us closer to developing useable indicators of women's empowerment. These insights are set to reach beyond our original hypotheses regarding mobile top-ups to provided analysis on social networks, mobility and participation in public life. For example, we are currently able to see the number of different contacts a user has as well as the number, time and duration of calls. As expected, Afghan women tend have fewer contacts than men, however interestingly, they tend to make long phone calls between 11pm and 3am.

Analysis of banking data is not as advanced; our initial hypothesis on banking loan data was not able to provide significant useful insights. To further this research the ethics committee and project staff are working to resolve some ethical and logistical concerns regarding accessing customer transaction data. The project needs to balance the aggregation of data for privacy and the limitations of aggregation on analysis.

This project has taken two years to date and a further 12 months is expected to fully develop and assess the effectiveness and efficiency of using the proxy indicators to measure development outcomes. While this is a significant investment of time and resources it is anticipated that the success of this project could provide a roadmap for remote monitoring in other contexts where traditional monitoring and evaluation methods are restricted. Already the ethical framework and legal review can be applied to other country contexts with little to no adaptation. In addition, it is expected that once finalised the machine learning model and banking data protocols will also be transferable.

Afghanistan Case Study: Use of third-party monitoring

Australia is one of 34 donors who contribute to the Afghanistan Reconstruction Trust Fund (ARTF), the largest single source of on-budget financing for Afghanistan's development. It is administered by the World Bank. In Afghanistan, security restrictions limit the travel Australian Embassy staff can do. However, by contributing to the ARTF, Australia benefits from the remote monitoring arrangements that the World Bank have in place. This includes the use of Third Party Monitoring (TPM). The Bank has a contract with a local

company who provides TPM, including collecting baseline information and producing quarterly monitoring reports which cover physical and financial monitoring. This is an important mechanism for collecting independent monitoring information about activities under the Trust Fund within Australia's security limitations.

For further information see <https://www.artf.af/>

Remote Monitoring of an Infrastructure Project Using Partner Government Systems in Indonesia

The Provincial Road Improvement and Maintenance Program (PRIM) is a pilot program to improve the sub-national road maintenance systems and processes in Indonesia using performance-based grants. PRIM has been scaled up by the Indonesian government as the Regional Roads Grants Program (PHJD). Grant disbursements are conditional on the verification of the work by International Technical Advisers (TA) who visited the worksites to confirm that the work had been carried out to a sufficient level of technical quality and within specified contract periods. However, with the start of the COVID-19 pandemic, international TA were no longer able to travel to Indonesia and make site visits.

PRIM and PHJD changed their approach to verification by engaging local consultants. The international TA and local experts provided online training to Provincial and District level staff at road offices (known as 'balais') and locally recruited consultants with appropriate qualifications located within or near the roadwork sites to assess the quality of works for verification (and limit the need for unsafe travel during COVID-19). An online verification process was developed which allowed Local Governments to submit evidence for the achievement of the disbursement linked indicators as per the Ministry of Finance process. The online data is reviewed and analysed by the Ministry of Public Works and Housing staff in Jakarta and their consultants. This approach of working with local partners is demonstrating longer-term benefits as the capacity of Government counterparts and locally engaged consultant teams is increasing to independently carry out verifications in future, and as PHJD expands into more regions. The program team are proposing to adopt the system in the future and replicate it in other locations.

Australia-Indonesia Partnership for Justice (AIPJ 2) (2017-2023)

The investment's monitoring system was set up from the beginning as an online system, which was able to be used by all partners and this has provided a strong basis to continue monitoring data collection during the pandemic. Despite the COVID-19 restrictions, partners are still able to implement programs and so the investment has increased the frequency of meetings/communications with partners from 6 monthly to fortnightly meetings. They developed a form to capture information from partners to DFAT and Government of Indonesia which targeted specific topics over a period, allowing for more regular information capture. The challenges the team have faced doing remote monitoring have related to the limited time to interact with partners in online meetings and that the AIPJ team have needed to put more effort in to ensuring the quality and accuracy of data being provided by partners through the online system.

AIPJ are also producing a weekly COVID-19 dashboard which monitors the spread of COVID-19 in their programming areas. The dashboard is also used by other parts of DFAT, including the Consulate General in Sulawesi, an example of good information sharing.

Towards a Strong and Prosperous Indonesian Society (MAHKOTA)

MAHKOTA supports the Government of Indonesia's National Team for the Acceleration of Poverty Reduction (TNP2K). When COVID-19 started, the MAHKOTA team did an internal review of the M&E plan to see what

activities were still possible and assess if any adjustments were needed. In the first workshop over Zoom, they found it challenging to achieve the same result as a face-to-face workshops as there were lots of participants, they couldn't read their reactions and were concerned that they weren't hearing all of the voices in the room. For the next workshop, they are trialling new ways of making the workshops more participatory, including the use of Mentimeter in addition to Zoom to allow live engagement. They have found that with remote monitoring they need to invest more in data triangulation. For example, they now combine data from the virtual workshops with written information and send this to counterparts to review and confirm. While they feel that counterparts have become more comfortable working remotely over time, the program team have noted that they have needed to invest effort in maintaining relationships with counterparts while they have been unable to meet face-to-face. Overall, the team have found that remote monitoring takes more effort, in terms of chasing down information and that the information they have received has been less rich and nuanced than under the previous system.

Remote Monitoring in Health Security

The goal of DFAT's **Health Security Initiative** (HSI) for the Indo-Pacific region is to contribute to the avoidance and containment of infectious disease threats with the potential to cause social and economic harms on a national, regional or global scale. The HSI provides support in more than 18 countries across the region, working with Australian institutional partners, partner government agencies, research institutions, NGOs, multi-lateral agencies and other donors.

Three of HIS's **Australia-based partners** are Peter Doherty Institute for Infection and Immunity, Menzies School of Health Research, and Burnet Institute. They work with in-country and regional partners to improve knowledge and control of anti-microbial resistance, reduce multi-drug resistant malaria and TB, and strengthen detection, response and prevention of malaria and TB.

Approaches and tools used by these partners for remote monitoring include:

- Online surveys or assessments e.g. using Survey Monkey, Kobo Toolbox to monitor activities, outputs, and outcomes.
- Videoconferencing (e.g. via Whatsapp) to: observe laboratory processes; monitor clinical documentation that cannot be scanned for confidentiality reasons; or conduct formal or informal coordination and monitoring meetings.
- Shared file storage systems (e.g. Dropbox), which allows staff both in Australia and in-country to clean data, check data quality and validity and to access data that assists with monitoring meetings. There are strict protocols for data entry and management to ensure quality of this data.

In all cases, **sound working relationships and trust are key enabling factors**. Project staff noted that it is also critical to continue to maintain and strengthen those partnerships, including being aware of the challenges that partners and their staff were experiencing during COVID-19. One project did this through regular and structured partnership health check processes. All projects noted the importance of allowing sufficient time to consult on and develop remote monitoring systems and tools and to train personnel to use any tools.

Unreliable access to internet has proven a key challenge to use of these methods, with impacts on the timeliness and quality of data collected. Partners are in the process of developing strategies to strengthen data quality. All three partners acknowledged that remote monitoring does not replace the value of face-to-face monitoring. However, the strategies described have enabled continued availability of quality information to monitor the performance of their projects.

ANNEX 5: TIPS FOR AN EFFECTIVE ONLINE CONSULTATION OR WORKSHOP

Virtual videoconferences need to be delivered differently to face to face workshops or meetings to be effective. Principles for an effective videoconferencing discussion include:

- Keep time to a minimum (2 hours max with a least a 10-15 minute break)
- Limit the number of participants to be appropriate for the activity (focus groups will need about 12 participants, for a workshop, a maximum of 20 participants is recommended if you can't use breakout rooms, 50 if you can)
- Use interactive software to engage participants further (such as an interactive whiteboard or mind-mapping tool) (*See Annex 1 above for suggestions about virtual collaboration tools*)
- Ensure technological and accessibility requirements are identified and considered (i.e. translators or interpreters, visual and hearing aides and considerations in anything shared on the screen)
- Only focus on 2-3 points of discussion, as time will get away quickly and be clear on your outcomes
- Consider pre-reading or preparation exercises for participants, noting that this can be an extra burden on them too
- Use breakout groups where necessary and think of the dynamics/personalities in the group (Note: ensure the videoconferencing account you are using has breakout room capabilities)
- Encourage the use of private messaging and the chat function for quieter participants, as well as other polling functionalities either within or outside the platform (i.e. Zoom polls, Slido etc). Also consider having separate consultation sessions for those who are less engaged in the bigger group.
- Allow for extra tech or a support facilitator to help run the virtual meeting smoothly. Try and have one facilitator for every 15 participants.

ANNEX 6: REFERENCE LIST FOR THE LITERATURE REVIEW

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