**Minutes - Information Management Network Meeting, 04th December 2019** *(revised 07Jan20)*

**Business Intelligence approaches for M&E and Grant Management**

Chair: Shon Campbell, MIMU Manager.

Participants: JPF, Phandeeyar, UNICEF/WASH cluster, UNICEF (Nutrition sector), UNHCR (CCCM/Shelter/NFI/Protection), UN-Habitat, OCHA, MCC, MIMU

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| **1** | **Business Intelligence approaches for M&E and Grant Management**  Dragos Salageanu, Systems & Technology Advisor, Joint Peace Fund  **Why a system was needed:** JPF funds activities supporting the peace process and was established in 2015. It comes between its 11 donors and UNOPS as the lead management body. All large grants are approved by the Fund Board and there is joint reporting but still differing expectations and needs from the different donor given that each is a governmental body with its own needs and requirements. The team started with a paper-based filing system however it was then decided to focus on soft copies as still a suitable solution for audits. Moved to electronic documents and forms, however it was a challenge to identify the latest form/version as each person had various drafts from different periods – this is particularly a problem as the organisation was growing and more people were coming and going. Considered purchasing  **Goals of the system:**   * Unified tool for grant management process for the entire life cycle of the grant for the 100+ grants * Everything is in one place (the cloud) so users have access as needed and where needed * Flexibility to adjust as needed * Enabling collaborative design recognising that different partners have different capacity – for example a very small agency may not have dedicated M&E capacity – therefore need to build the system together with the * integration with existing specialised systems of the JPF and UNOPS * Easy to understand for staff and partners * Enabling more timely management of grants * Automate administrative steps so staff could focus their time on more * ability to update various changing staff of donors, partners and JPF   **Process of development:** JPF started with a system to clarify the final version of relevant documents through a system of virtual “document cards” – these clarify, for each grant, the status of particular steps in the grant management process and who is responsible to action that step within the team, donors and partners. Access permissions limit the access of each user so they see only the information which is relevant for their purposes. Information on the status of each grant (including submission of documents, discussions, approvals etc), appears on a dashboard - the person responsible only receives the information they need to work on, and once the steps are taken, it is referred to the next person. Donors, JPF staff and implementing partners have dashboard access and see only the elements which are relevant to them. This process has automated administrative steps in the workflow to make it easier and faster (faster grant review and approval, progress reports are directly entered online in the required format for JPF use). Human judgement is still needed for particular steps but it has facilitated the less productive steps, making them faster, centralised and with less risk of error.  The system enables the partner to be engaged at various steps (collaborative design flow) to ensure the partner information is set up to readily manage their grant information, Logframe and M&E framework. The system includes features which are updated by various inputs from JPF departments as well as the implementing partners to highlight key points needed by decision-makers, such as basic grant detail, implementation status (underway, completed etc), a multidimensional risk analysis, grant administration, the finalised proposal, logframe, M&E and reporting process. The system has the same basic dashboard interface for all users but some information will be hidden depending on what the user can have access to (e.g. a partner will see only their grant and not others)  The JPF system includes all steps in the grant workflow from initial discussions through to reporting and finalisation: i.e. records of concept notes 🡪 evaluation committee result 🡪 proposal development 🡪 appraisal and final decision 🡪 grant agreement 🡪 links to M&E elements (i.e. set up logframe with activities, indicators, risks and assumptions etc 🡪 input data for progress reports, including visual materials for communications 🡪 and input to enable oversight of overall grant management.  **M&E elements**   1. Theory of change – JPF’s theory of change (if this, then that) is linked to the 83 indicators in the JPF Logframe. Partners’ grant information and planned activities are uploaded into the system and matched to the JPF Logframe and indicators so it is clear which part of the JPF theory of change the activities will support. 2. Logframe – based on the information entered, a project Logframe is generated flor each grant in a standardised format listing the activities, assumptions, indicators, targets etc for the partner’s specific grant. 3. Monitoring information – partners can then add the quantitative detail on their achievements in the format based on questions which are designed by the type of activity – eg number of trainees and levels of disaggregation required (male, female, types of organisations etc), as well as qualitative data. This avoids implementing partners from preparing pages of reports – instead partners enter their monitoring information into the system and this acts as the required report. It means information is available by grant/project/partner as well as brought together for more efficient reporting. 4. Communications – can upload photos and other communications materials into the system which are then accessible by the permitted users. 5. Dashboards – linked to an Embedded Power BI dashboard (Windows-only tool that has evolved from Excel, Access and visualisation software). This allows partners to see their information readily prepared, as well as access for donors and JPF staff to combine the data at any time to show, for example, the overall commitment across all grants for any period, burn rate across various stakeholders, and outstanding risks to be addressed. This also supports managers – at partner, donor and JPF level – to oversee how the work is going. The system does not measure the efficiency of the various internal steps but checks that each has been done. 6. Mapping – a new element using MIMU Pcodes and geospatial information with data from the JPF system to generate township level maps in Power BI.   **System development:** The system has been developed with ACE data systems, a local software developer. Links will be maintained with the Developers for as long as the system will be used. Prototyping was developed in-house (examples of needs, outputs from the system) and passed on to the Developer to create the JPF grant management system. It uses a querying language which links to a logical data model showing relationships between the various types of information that will be queried. This is especially useful when you are trying to aggregate many indicators which have various disaggregation levels to see the overall progress, or are looking at clarifying disaggregated targets. Stored in Microsoft SQL data warehouse (one for testing, one for development) hosted on a virtual machine AZURI with different access permissions for the various groups. Relevant data from previous years was uploaded to enable tracking if current grants. Ongoing infrastructure costs are not so high for the high benefit and time saving with the new system.  In terms of roll-out, it requires internet for use and there have not been major issues for partners in accessing the platform. JPF visits each partner to set up the online systems for the new grant and provide an orientation for partner organisation staff. The system is still being fine-tuned to add additional features based on what is needed for visits, reporting, planning and new information needs etc. In terms of how it is being used, donors and implementing partners like the system as it speeds up the process of grant approvals etc. The tool is management centric and is generally appreciated more by managers within JPF and who need the information for decision-making. Users have found it a little more difficult as it is a change requiring inputs into the system which are seen by donors. A next step is a review with external users (donors and implementing partners) to review how much time has been saved through the new system. Participants at the meeting were interested to know whether the system is open source and could be available for other organisations.  Power BI is affordable but is still a newer platform – more resources can be found through [www.sqlbi.com](http://www.sqlbi.com) and the book, “*The Definitive Guide to DAX - Business intelligence for Microsoft Power BI, SQL Server Analysis Services, and Excel*”. |
| **2** | **Updates on National Initiatives (statistics and spatial data)**  **Myanmar Statistics Forum:** Arranged by the Central Statistics Organization in Nay Pyi Taw on 29th November, with a focus on *Our Statistics, Our Society: Promoting Statistical Literacy in Myanmar*. The annual Forum provides the opportunity for government agencies and development partners to promote statistical literacy within Government and to the public. It included various presentations and panel discussions with perspectives from the governmental statistical clusters, private sector, media and civil society as well as development partners to present their views on promoting statistical literacy and strengthening the national statistical system in Myanmar. The DG of CSO provided updates on statistics reform initiatives over the past year:   * Legal reform – began with a Policy brief on the National Statistics System developed in line with the UN guidelines, and the Statistics Law was approved on 22 January 2018 and CSO has developed the required By-laws which are now with the Attorney General’s office for approval. * Institutional Reform – focus areas have been strengthening the coordination role of CSO and mitigating weaknesses in the decentralized statistical system; establishing the Central and regional Committees for Data Accuracy and Quality of Statistics, chaired by the Vice President. The Central Committee has met twice so far and is expected to meet 2-3 times in a year to review wider quality issues and implementation of the NSDS. * Implementation – focus areas have been the National Strategy for the Development of Statistics / NSDS; coordination with the international community through the Statistics Quality Development Sector Coordination Group; and strengthening ICT and data infrastructure for NSDS implementation. The NSDS is now in its implementation phase (2019 – 2024) and includes 9 strategies and 38 actions which are being overseen by 10 NSDS clusters, such as the cluster looking at survey coordination and statistics standards.   **National Indicator Framework for the MSDP and SDGs:**   * Myanmar SDG monitoring: Two major steps have been the Data Assessment Report in 2016, and the SDG Baseline report in 2019 which clarified that 61% of the SDG indicators are available. State/region level workshops have been arranged to raise awareness of the monitoring of SDG indicators. Data from 2019 will form the baseline, with an update in 2020. * National Indicator Framework: 289 indicators were proposed by the 13 task teams for the National Indicator Framework (NIF) to measure progress in the Myanmar Sustainable Development Plan (MSDP), 39% of which are also indicators to measure the SDGs. 72% of the NIF indicators are considered to be strategic level indicators, and the remaining 28% project indicators. 73% are readily measurable. The focus is now on setting up the system to measure these indicators: The second round of one-day metadata workshops for the Myanmar Sustainable Development Plan’s National Indicator Framework (NIF) will take place between December 9 - 20, led by the MoPF/Central Statistical Organization with technical assistance of UNDP, and with support from DPs, NGOs/CSOs and private sector organizations. The metadata process follows the finalization of the draft NIF earlier this year. The second phase of workshops aims to complete the metadata templates for all indicators that are currently measurable and clarify the focal points in government departments responsible to measure them. A third and final round of metadata workshops will be arranged in early 2020 to finalise any last gaps in the metadata, establish indicator baselines and technical recommendations for indicator targets, and determine next steps for indicators that are not yet measurable. Technical support is being provided by UNDP for this initiative.   **Ongoing initiatives:**   * Data Harmonization**:** UNFPA is supporting CSO in a project to develop common indicators standardizing data definitions and clearly defining concepts, definitions and methodology across ministries for a limited number of indicators in the initial phase. * International Comparison Programme (2017 round). Developing international price comparisons which consider GDP in terms of Purchasing Power Parity for 69 townships. it includes food, household and non-food items and will be launched at the end of 2019. Supported by ADB. * Statistical Business register (SBR): Launched at the statistics Forum, the Statistics Business register is based on a data gathered by CSO offices in states/regions in 309 of the 330 townships countrywide. It includes information from over 220,000 active businesses around the country and provides a survey framework for business surveys, including the Myanmar Business Environment Index Survey which is currently underway. The initiative has been developed by CSO with support of UNESCAP and ADB and will be updated annually. * Bloomberg Data for Health initiative: A system being developed for gathering data on cause of death (verbal autopsy) to support use of policy and planning in combating communicable diseases. Undertaken by CSO and MoHS with support of the University of Melbourne and Bloomberg Philanthropies. * Mobile Birth and death Registration: Pilot project in Mon State in the use of mobile platforms for registration of births and deaths being undertaken by Telenor, UNICEF, MoHS, GAD and CSO. Aiming to scale up to countrywide level. * Data collection on the eradication of child labour: Working committee met in May 2019. Pilot to gather data on child labour is starting in Bago Region. * Myanmar Living Conditions Survey (2017) – further reports will be launched soon in this initiative involving CSO, UNDP and World Bank. * Survey on Public Perception of Government Services – has been undertaken and the report submitted to higher level authorities for review. * Post-graduate Diploma in Statistics: launched by University of Nay Pyi Taw. CSO is conducting Postgraduate Diploma in Statistics in Graduate School of Administration and Development (GAD). * New Publications: Disaster Survey Report 2018, Statistical Year Book 2019 (to launch shortly), Selected Monthly Economic Indicators, new CSO website. * Open Data Inventory (ODIN) – Myanmar is #78 in this international listing, and 5th in ASEAN behind Singapore, India, Malaysia and the Philippines. Myanmar’s overall score for the rating was 47/100.   **Intercensus and back population estimates**   * Intercensus – data collection will be completed at the end of January and the interim results made available in June 2020. * Population estimates between censuses 1983 – 2014: A new publication will soon be launched by DoP with back projections of the annual population between the last 2 national Census initiatives, filling an important gap in the available data for trend analysis. It is calculated at state/region level and considers mortality, fertility and migration factors as well as the deaths in cyclone Nargis. Information is available from the DoP website and raw / microdata (10% can be requested from DoP.     **World Bank Digital Development projects:** World Bank is working on two major areas in terms of digital development in Myanmar   * Telecommunications sector – this ongoing project is supporting sector reform and regulation and has achieved the reduction in SIM card costs in Myanmar among other benefits. Current focus areas include finalization of MPT corporatization, establishment of an independent telecom regulator, MCC (Myanmar Communications Commission), spectrum management (bandwidth regulation) including border spectrum management with India, China and Thailand (Tachileik and Kawthoung are nearing completion); regulation and updating the legal framework and cyber laws, including attention to data protection and privacy considerations; improving the environment for online transactions, and a pilot project promoting mobile access in remote and rural areas (activities are planned for 4 TS, including 2 TS (Ann and Minbya TS) in Rakhine State). The rural access pilot will inform a wider rollout of this approach by PTD (Post and Telecommunication Department of the Ministry of Transport and Communications) to more townships. It also includes a Myanmar national portal being established with the Ministry of Transport and Communications which will enable systems from different ministries to “plug-in” their own public-facing systems to make government-wide information available to the general public through one main entry point. * Digital government (e-govt initiative) – still under discussion. This project would link with the national portal and progressively make more personal services available to people living in Myanmar through that platform as is the case in various other countries. |
| **3.** | **Updates on cluster/sector/agency initiatives**  **Phandeeyar**: Moving toward an impact measurement system which will allow review in terms of strategy as well as grant management and seeking a consultant to help develop this.  **OCHA:** Noted the MHF system which is mainly developed by HQ. Sub-national INFORM index has been finalized (risk assessment tool at TS level) and is in the process of validation at HQ level). New Humanitarian Access group launched and considering how to track humanitarian access through OCHA sub offices.  **UNHCR**: Mentioned the refugee information system developed in Jordan and the discussions re what to develop in-house or to out-source.  **WASH cluster**: work with the health cluster on integrated analysis (snapshots) focusing on identifying the public health risk related to watery diarrhea/morbidity. A draft has been developed and will be presented in the next Health Cluster meeting to finalise after which it can be shared through the relevant clusters. Integrating Power BI in the WASH 4W and gap analysis dashboards.  **Nutrition sector:** Recently updated nutrition 4W for Rakhine and service coverage.  **UN-Habitat:** Interest in use of Power BI.  **MIMU:** Has been working on a project with consultants to streamline MIMU systems to facilitate data management, development of new tools and our ability to share the MIMU model more widely. This has included steps to jointly define the main data objects (what we need to track), workflows (how we are doing it currently), the current and ideal logical data models (definition of all the information to be included) and the physical data model (ICT infrastructure, harmonized classifications and SOPs to manage the many aspects of the system). The work has been supported by 2 international consultants.  The Education Management Information System (EMIS) will be launched Friday 6th December in Nay Pyi Taw with the School Mapping Platform developed by MIMU. In this project, MIMU led on the collection of geo-coordinates of over 99% of the 47,004 formal sector schools and education institutions around the country. MIMU is providing technical support to development of the National Coding System which is expected to be launched publicly by GAD in early 2020. At the suggestion of Jhpiego, MIMU will arrange one-day, Myanmar language orientations on the use of Power BI and Tableau for interested IM Network members. |
| **4.** | **Next Meeting** – 5th February 2020 - Interested speakers are invited to contact Shon/MIMU. |

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| 12 | Yin Yin Tun | Grants Manager | Phandeeyar |
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| 15 | Catherine Lefebvre | IM Specialist Manager | MIMU |
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| 18 | Shon Campbell | MIMU Manager | MIMU |