

Tools for remote or partly remote monitoring:

This is a free-standing document that is made to collate practitioners' experience in doing remote or partly remote monitoring. It was triggered in response to the Covid-19 pandemic and is also useful to practitioners with other limitations on monitoring such as security or distance. However, it also aims to assist practitioners with improving monitoring efficiency, bearing in mind the trade-offs between remote and in-person monitoring.

It has been made based on experience collected from participants who attended the Advanced Training Workshop in Results Measurement for PSD held in November, 2019 in Bangkok and a DCED organised case clinic held in July 2020 where programmes and practitioners came together remotely to discuss specific challenges they have faced in doing remote assessment and possible ways forward to address these challenges. Based on the input from participants on these two events, this table has been put together listing different tools that can be used for remote and partly remote monitoring along with the context it can be used in, advantages, disadvantages, ways to reduce challenges and examples of use. It is designed to be a living document to both collect and disseminate practices and experience on monitoring remotely or partly remotely. It aims to assist practitioners to monitor with limited in-person interaction.

It is currently being circulated amongst different programmes who have experience in using such tools and more to get their input on content and format of this document, so that it can be developed further.

Last update:

Date	Who	Sources
3rd August 2020	A. Miehbradt H. Posthumus N. Sen Bekkers	Advanced Training Workshop in Results Measurement for PSD (November, 2019) DCED Case Clinic on Remote Assessment Tools (July, 2020)

#	Tool	Description	Purpose	Advantages	Limitations of the tools	Challenges and ways to address them	References	Examples	Classification	
									Remote	Partly-remote
1 Phone-based										
1	Telephone calls	Researcher calls respondents for interview. Fills in responses in paper or using tablet.	As long as its short, it can be for used for market assessments, monitoring and for impact assessments.	Can be done rapidly (during disasters or pandemics such as Covid-19). Easier way to get data by talking directly to a person. Faster than face-to-face interviews. (The same questionnaire takes longer in person.) Can do global surveys relatively easily. People might be more comfortable sharing information over the phone than face-to-face. Cheaper than in person research. Compared to other remote tools, it allows more probing and detailed data collection.	Does not allow a lot of data to be collected, compared to in-person interviews as people are more time conscious when doing phone interviews. Not all respondents can be reached through telephone, leading to response bias. Not suitable if you want in-depth data on costs/expenditure. Qualitative information is harder to get. Less time available and harder to build rapport (Potentially – but not in all cases). Requires having telephone numbers of respondents; getting these can be challenging and time-consuming if not already available. Network issues.	Prepare in advance with enumerators practicing asking questions. This helps to ensure that data can be collected efficiently and fast. Where phone numbers are not known or respondents don't have phones: organise 'local facilitators' with a device to visit people and enable enumerator to interview respondents using that phone. If possible you can also use radio programmes to collect numbers. If collecting sensitive information ask respondent to find a quiet corner to talk from. To give respondents clear incentive to participate, consider giving a monetary incentive through mobile transfer. Use Interactive Voice Recording (IVR) to collect data so that respondents would not be charged. Use toll free lines. If survey is too long, consider dividing into two logical sections and doing each half with different respondent group. Otherwise plan follow up calls with same respondents to get more information. To collect quantitative data, consider having multiple choice questions to save time and get more reliable responses.	https://60decibels.com/user/pages/03-Work-remote-survey-toolkit/60-Decibels-Remote-Survey-Toolkit-March-2020.pdf	MDF in Pakistan collected data on a new mobile phone information service in a remote area using a telephone survey. The survey complimented data collected from the information service provider on the number of subscribers, active listeners, duration of calls, etc. It was designed to get feedback from farmers on the service and to measure the impact. https://marketdevelopmentfacility.org/wp-content/uploads/2019/07/MDF-PK-SSC-Telenor.pdf Farhan Akhtar, MDF @ mufarhan.akhtar@gmail.com Ali Sarwar, MDF @ ali.sarwar.2feb@gmail.com	Remote	
2	SMS text messages	Sending text to get short responses to a limited number of questions	Can be used for any information gathering provided it is limited and primarily or wholly closed ended.	Easy and inexpensive to administer. Can be done at respondent's own convenience. Can be done to collect sensitive data.	High mobile penetration and literacy rates. Network issues. Needs to be limited to a few questions, otherwise risks high non response.		https://60decibels.com/user/pages/03-Work-remote-survey-toolkit/60-Decibels-Remote-Survey-Toolkit-March-2020.pdf		Remote	
3	Using device-based data collection tools (like KoBo Toolbox) in combination with telephone interviews	Short survey/interview whereby the enumerator calls the respondents rather than visits them and records responses on a tablet or other device.	As long as its short, it can be for used for market assessments, monitoring and for impact assessments	Using mature systems like KoBo Toolbox to record and process data captured during telephone interviews is cheap and easy. Compared to on-line surveys, there is the option of 'verifying' hence better quality and insight. Data is immediately accessible and can be checked by research teams who can also give real time feedback.	Same as in telephone interviews.	Ensure script and protocol to avoid bias and manipulation. Respondent contact info must be known and respondents must be aware -same observations as for other phone based tools.		S4J supports VET institutions to develop a tracking and tracing system. They survey graduates using telephone interviews and the interviewer records the responses using KoBo Collect. Erka Cara, S4J @ erka.caro@swisscontact.org	Remote	
4	Interactive Voice Response (IVR)	Using computer generated voice to ask questions and get responses.	As long as its short, it can be for used for market assessments, monitoring and for impact assessments	Works in low literacy areas where SMS or online surveys cannot be used. Less expensive than phone interviews. Sensitive questions can be asked.	Limited number of questions can be asked. Qualitative data cannot be collected. Cannot ask open ended questions.		https://60decibels.com/user/pages/03-Work-remote-survey-toolkit/60-Decibels-Remote-Survey-Toolkit-March-2020.pdf		Remote	

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6 Partner and target group oriented										
1	company records	Customer, financial or other records kept by a company, typically a partner	Getting in-depth and/or consistent information from a company over time.	Company's own records, so likely to be accurate and consistent over time. Depending on what records the company keeps, can get information on a variety of topics, but typically most useful for financial performance data.	Many companies will not allow outsiders to look at sensitive records (e.g. financial records). Some companies don't keep accurate or thorough records.	Businesses may not have the incentive or the capacity to gather and share specific information. Put information sharing requirements in partner contracts. Don't require businesses to keep records on things that are not useful for them. Keep recording requests manageable and realistic. Build business capacity to keep records if needed.	Practitioners' Notes (2018) on Gathering Information from Businesses		Remote	
2	Providing apps to clients									
3	Providing access to MIS									
4	Keeping diaries	Asking partners or target group members to keep a diary with specific information.	Getting in depth and/or consistent information from respondents over time, for example on: expenditures, types of customers, activities and time use.	Respondent writes down information as it happens so less chance of forgetting. Get information on periodic occurrences over time.	Respondents may not keep diary consistently. May be difficult to check accuracy. Intensive for respondent. Requires literacy.		CDC Group (2019). Impact measurement: A practical guide to data collection. CDC Group, London UK. Rachel Shah, The Springfield Centre @ Rachel.shah@springfieldcentre.com	ALCP in Georgia asked female and male beneficiaries to keep diaries on activities and time use to gauge changes in work load as a result of interventions. Nona Samkharadze, ALCP @ nsamkharadze@mercycorps.org	Remote	May require in-person interaction to set up and collect data
5										
6										
7 Secondary sources										
1	Buying data bases								Typically remote	
3	Geographical information	Using information on geographic characteristics such as land size, land use, distribution of types of companies, topography, water sources etc. Information is typically from secondary sources but can be combined with primary data as well by pinpointing locations of specific features, companies etc.	Assessing changes in land purpose and use. Analyzing trends and opportunities in sectors such as the spread of particular types of companies or opportunities for specific crops.	Provides a spacial understanding of trends and opportunities. Information is often publicly accessible. Can be combined with primary data to enrich analysis. Inexpensive.	No opportunity to probe. Limited to geographical characteristics.		https://www.enterprize-development.org/wp-content/uploads/Nairobi_RM-Presentation_MAD_E-GIS.pdf	MADE in Nigeria uses secondary and primary geographical information to analyse trends and identify opportunities in agricultural sectors.	Secondary info is remote	Primary info can be gathered in person or remotely (eg through telephone)
4	Government data (taxes)									
5										
8 Others										
1	Observation	Observe transaction or how people respond to a particular offer or message.	Getting information on how people react in real life situations to products, services, advertising or messages the program may promote or is promoting.	Information is gathered in a real life situation so less likely to be biased. Can be useful for initial research or triangulation with other tools.	Not all transactions or responses can be observed. Reactions are not always easy to interpret. No opportunity to probe or get further information.	Important to be clear on what the observer is looking for so that reactions can be understood to the extent possible.	Deeptha Umapathy @ deepthaumapathy@gmail.com			In person but can be distant.
2	Hire local enumerators to collect data	Hiring enumerators to gather information in their own locale.	Conducting in-person information gathering without extensive travel.	Enumerators know the locale, dialect, local terms etc. well.	Requires in person interaction. Can introduce bias if enumerators know respondents personally.	Training and paying enumerators remotely can be challenging. Ensure data collection instruments are easy to use and intuitive. If possible, have a mechanism to check data and address problems during the informaiton gathering.				In-person interaction local; no extensive travel
8										