Put Data in the Driver's Seat

Unlocking data for decision-making with the PEPFAR Management Dashboard

*This Webinar is being recorded for public distribution.

WEBINAR OVERVIEW

- **Introduction**, Lourdes de la Peza, *Principal Technical Advisor*, LMG Project

- **Background and Features of the Dashboard**, Danilo Rayo, *Director,* DRB Consulting & Translations

- **The Dashboard in Action**: **Experiences of the Pilot NGOs**

  - Dr. Doreen Agasha, *Senior M&E Officer*, Protecting Families against HIV/AIDS (PREFA)

  - Peter Njuguna, *Acting M&E Manager*, National Organization of Peer Educators (NOPE)

  - Peter Muganga, *Head of Internal Audit,* Reproductive Health Uganda (RHU)

The PEPFAR Management Dashboard: The need

- Managers are overwhelmed with data

- It is difficult to identify what are the strategic indicators to focus on

- It is necessary to select key indicators that reveal the program status and trends

- It is critical to make a systemic analysis of data, the connections between programmatic, financial and management indicators

The PEPFAR Management Dashboard: The approach

- The LMG Project seeks to develop tools and operational processes to empower local implementing partners to manage their operations more effectively, ultimately improving performance and results.

- The dashboard provides project managers with an easy to read, real time user interface called the PEPFAR Management Dashboard

- The PEPFAR Management Dashboard provides a dynamic graphical presentation of the current status and historical trends of the key performance indicators, enabling instantaneous and informed decision-making

The LMG Dashboard: The pilot

Photo: Eduardo Samoyoa

- **Phase One**: May to September 2012. Two CSOs in Uganda: RHU and PREFA.

- **Phase Two**: January to September 2014. Transformed the PEPFAR Management Dashboard into a generic format and tested at two CSOs in Kenya: NOPE and KANCO.

What is a Management Dashboard?

A Management Dashboard is a user-friendly tool that makes use of critical indicators to enable managers to quickly view key operational data for the organization's projects.

- The dashboard is *not a database* and *does not replace existing financial and program reporting procedures.*

- It combines use of Excel and SAP Dashboard Software

When and how to use the PEPFAR Management Dashboard?

- To present financial, management and program results of projects to different users
  - Executive Directors
  - Sub-implementation level staff
- In a variety of situations
  - Individual projects
  - Organizations running multiple projects

- In a variety of settings
  - Project team meetings
  - Board meetings
  - Annual general meetings
- In a variety of formats for information sharing

# Components of the PEPFAR Management Dashboard

The dashboard covers three operational areas and includes an action plan to follow up on progress.

Program	Finance
Management	Action Plan
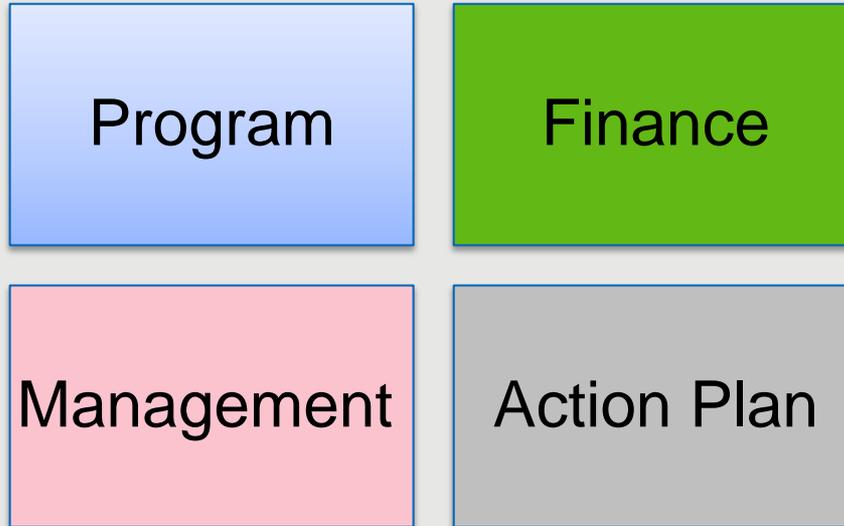
Components of the PEPFAR Management Dashboard

Component	Description
Program *What are the results of financial investments?*	Tracks the results of the implementation of activities.
Finance *How much money was available for the reporting period and for the rest of the year? How much money has been received and how much of that money has been spent?*	Tracks the organization's financial investments.
Management *Which resources or activities, if absent, can halt or poorly affect the pace of implementation? "*	Tracks the organization's key delivery mechanisms and critical resources for implementation.
Action Plan *What are the key decisions linked to each of the components?* *What are we going to do to close implementation gaps?*	Tracks key decisions made and action items to be taken to address issues identified in the three operational areas and amongst the projects.

The PEPFAR Management Dashboard Generation Process

Conceptualization → Dashboard Master File setup and SAP installation → Using and Managing the Management Dashboard → Archiving and Setting-up the dashboard for a subsequent year
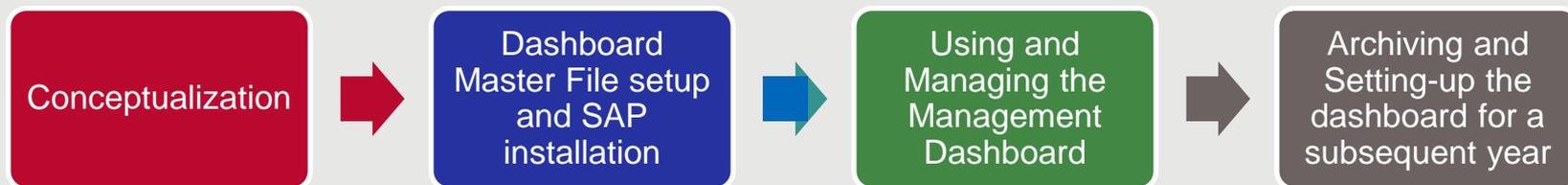
I. Conceptualization

This stage ensures that the organizations wishing to adopt the PEPFAR Management Dashboard have the necessary minimum capacities and that they are clear about what, how, and how often they shall measure their performance.

Undertaking the organizational systems and information technology assessments

IT Readiness Checklist.xlsx

Organizatinal Checklist.xlsx
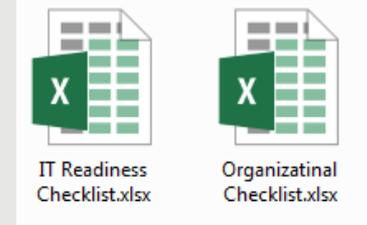
**Identifying monitoring levels and confirming reporting capacities**

Dashboard Reporting Matrix.xlsx

Indicator Selection Worksheet.docx
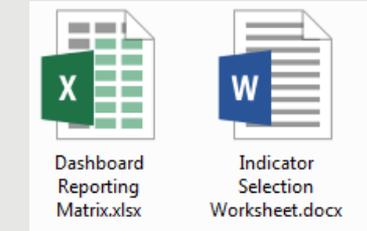
Defining performance thresholds

Dashboard Master file - Fictitia.xlsm
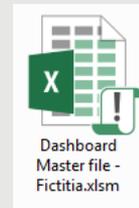
II. PEPFAR Management Dashboard Master File setup and SAP installation

- The Dashboard Master File is an Excel spreadsheet that is used to aggregate the all data being entered into the Management Dashboard into one file

Dashboard Master file - Fictitia.xlsm

- The SAP Crystal Dashboard Software is the application that allows users to see the dynamic content of the dashboard

The PEPFAR Management Dashboard Master File

Section	Description
Dashboard Master File Setup tab	It contains the information needed to identify the PEPFAR Management Dashboard, the reporting level, thresholds and lists of indicators.
Dashboard Master File data	The Dashboard Master File tables are used to capture quarterly data. There are five tabs representing the five areas in which data must be collected.

The PEPFAR Management Dashboard Master File – Setup tab

The PEPFAR Management Dashboard Master File – Setup tab

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The PEPFAR Management Dashboard Master File – Setup tab

Lists

Indicator	Donor	Project	Population_Group	Management	Finance Indicators
1. Number of people co	GlobalFund	Project1	FSW	No of Quarterly Staff	Budget
2. Number of individual	DFID	Project2	MSM	No of Monthly HR sta	Funds Received
3. Number of individual		Project3	General Population	No of Monthly comm	Expensed
4. Number of NGOs/CB(		Project4	IDU	No of Monthly resour	Onward Disbursments
		Project5	Male	No of Quarterly Board	
			Female	No of Quarterly finan	
			Truckers	No of Quarterly progr	
			SW		
			Total		

The financial indicators cannot be changed

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The PEPFAR Management Dashboard Master File – Data

Programme indicators				Target					Actual					
Indicator	Donor	Project	Popula	ene - mar	abr - jun	jul - sep	oct - dic	Total	ene - mar	abr - jun	jul - sep	oct - dic	Total	Comments
1. Number of people counseled, tested and rece	GlobalFund	Project1	FSW	300	345	449		1,094	543	825	449		1,816	
1. Number of people counseled, tested and rece	GlobalFund	Project1	MSM	200	230	299		729	66	108	299		473	
1. Number of people counseled, tested and rece	GlobalFund	Project1	Genera	500	575	748		1,823	773	1,381	748		2,902	

Financial Indicato		Budget					Funds Received					Expensed					Onward Disbursments	
Donor	Projec	ene - mar	abr - jun	jul - sep	oct - dic	Total	ene - mar	abr - jun	jul - sep	oct - dic	Total	ene - mar	abr - jun	jul - sep	oct - dic	Total	ene - mar	abr - jun
GlobalFund	Project1	1143,981	1741,451	2600,423		5485,854	-	2741,451	2177,993		4919,444	1048,688	1692,763	2105,187.30		4846,638	1048,688	1501,515.50
DFID	Project2	2330,897	4239,559	7053,626		13624,081	616,501	4239,559	5445,821		10301,881	1395,458	3460,602	1609,601		6465,660	1395,458	2200,026.22
DFID	Project3	739,589	1419,638	1913,559		4072,786	195,614	1419,638	2761,636		4376,887	1300,000	315,252	928,880		2544,132	8438,326	269,722.30
DFID	Project4	13995,760	16564,269	29873,154		60433,183	3701,749	16564,269	26850,153		47116,171	11541,855	8724,163	10571,720		30837,738	11541,855	8004,654.67
DFID	Project5	2299,285	4070,028	7701,995		14071,308	608,140	4070,028	4834,956		9513,124	-	4678,168	4387,680		9065,848	-	2725,092.81

The PEPFAR Management Dashboard Master File – Data

Reporting indicators		Target				Actual			
Project	Indicator	ene - mar	abr - jun	jul - sep	oct - dic	ene - mar	abr - jun	jul - sep	oct - dic
Project1	Programme reports received on time	3	3	3		2	3	2	
	Programme reports received complete	3	3	3		3	2	3	
Project2	Programme reports received on time	3	3	3		3	2	3	
	Programme reports received complete	3	3	3		3	3	3	

| Management indicators		Target				Actual				Comment
Area	Indicator	ene - mar	abr - jun	jul - sep	oct - dic	ene - mar	abr - jun	jul - sep	oct - dic	
Meetings	Quarterly Staff management	1	1	1		1	1	1		
Meetings	Monthly HR staff committee	3	3	3		3	3	3		
Meetings	Monthly communications committee	3	3	3		3	3	3		
Meetings	Monthly resource mobilization comm	3	3	3		3	3	3		

The PEPFAR Management Dashboard Master File – Action Plan

Area	Actions	Deadline	Responsible	Comments	Status: Complete=1, In progress=0, Incomplete=-1
Programmatic Area	The target for the number of people counse	August	Programme management, CEO	Due the fact that some of the donors has not	-1
Programmatic Area	KMS to be developed and implemented by t	September	CEO, Contractor	Project completed on time	1
Programmatic Area	On site data verification exercise to be comp	December	M&E officer	25 of the 30 sites have been visted and the da	0

Generating the PEPFAR Management Dashboard

Complete setup and data input for all areas → **Create the Dashboard Data File** → **Import the Data File into SAP** → **Export the Dashboard to one of the format options**

Dashboard Master file - Fictitia.xlsm

DashboardDataFile_FICT2014_0.xls

Standard Dashboard (SAP).xlf
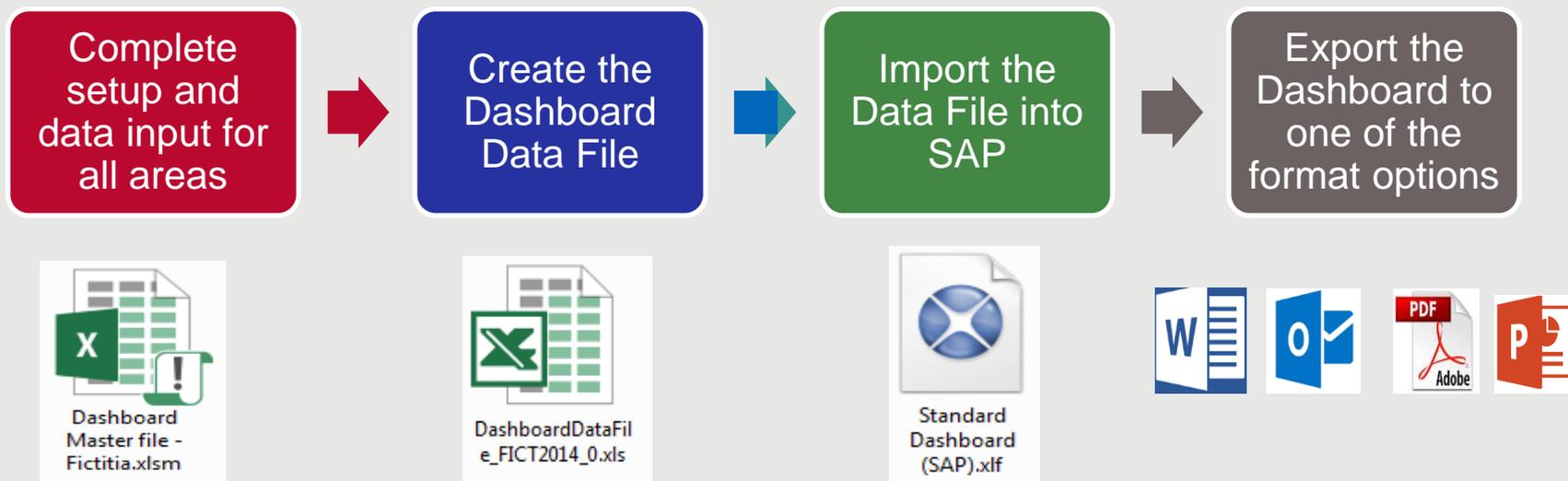
III. Using and Managing the PEPFAR Management Dashboard

Quarterly development of the Management Dashboard → Analysis of the Management Dashboard → Closing the Quarterly Management Dashboard → Updating or adjusting a current Management Dashboard
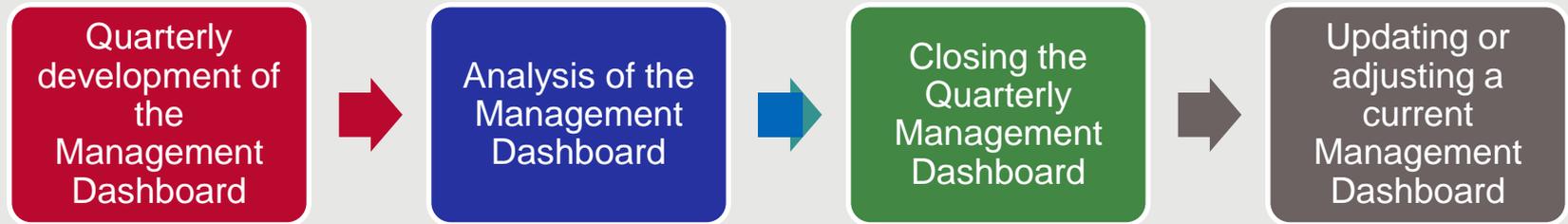
Demonstration of PEPFAR Management Dashboard Generation

IV. Archiving and setting up the PEPFAR Management Dashboard for a subsequent year

Archive the Management Dashboard → Formalize archiving procedures → Set up a new year's Management Dashboard

Important principles linked to the PEPFAR Management Dashboard

- Management should first and foremost ensure the presence of the basic requirements that are necessary to set up and use dashboards

- The IT principle of "Garbage in, Garbage out" (GiGo) applies to the concept of dashboard implementation

- Its implementation does not guarantee improvement unless the information is adequately used for proactive evidence-based decision making

- The dashboard requires management to openly acknowledge good as well as poor performance

- The organization should establish a dashboard project team that drives the implementation of the dashboard adoption process

- Management should identify the right people for the role of dashboard champion

- The dashboard project team should consult extensively with the users of the dashboard

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Protecting Families Against HIV/AIDS (PREFA)

Dr. Doreen Agasha, Senior M&E Officer

# Why adopt the PEPFAR Management Dashboard?

- Monitoring a project involves monitoring progress against set targets for

- It also entails assessing achievements vs resources used during implementation

- At PREFA we needed a captivating way of displaying this information

- This would enable the implementer to measure their own performance and set plans for improvement

Challenges

- The MoH required districts to use the DHIS2, rendering the PEPFAR Management Dashboard irrelevant.

- LMG dashboard has been maintained for use at the head office where it is used in performance review.

- Sustainability and functionality requires clearly defined roles for all members of the M&E team.

Success with the PEPFAR Management Dashboard

- The dashboard facilitates quick interpretation of data, enabling sound decision making.

- The dashboard gives a visual description of project performance at district and NGO level

- Progress across quarters is studied with ease.

  - 15 indicators under the EMTCT and IRS
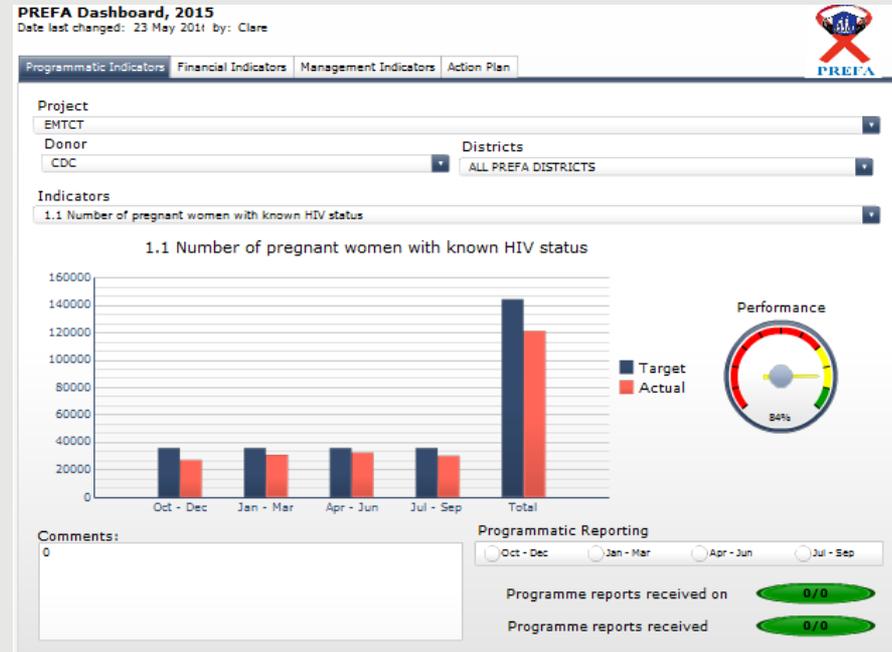
The Way Forward

- Institutionalizing the PEPFAR Management Dashboard has been a work in progress and a learning process

- The next course of action includes:

    - uploading the third project at PREFA onto the dashboard

    - uploading financial information, which will enable tracking outputs versus cost.

    - Making full use of the PEPFAR Management Dashboard and institutionalizing it by June 2017.

National Organization of Peer Educators (NOPE)

Peter Njuguna, Acting M&E Manager

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Why adopt the PEPFAR Management Dashboard?

- Capture performance in a simplified format
- Improve the involvement of the Advisory Board and Management team overseeing programs´ performance
- Present a simplified picture to stakeholders, especially new ones

Photo: Willia Vasquez

Challenges

- PEPFAR project indicators are not similar to institutional indicators

- General acceptance and linking dashboard with reporting needs

- Unified NOPE report with dashboard indicators

- Annual/quarterly reporting does not provide a clear picture of program´s performance

- Working with projects to improve data collection on time

- Staff cannot see how the dashboard can help to improve their work

- Advocate to demonstrate the benefits of the dashboard

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Successes and Way Forward

- The Board has understood dashboards

- Now M&E presentations to the Board always include the dashboard

- Online presentation of dashboard on website and online newsletter

Photo: Willia Vasquez

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Reproductive Health Uganda

Peter Muganga, Head of Internal
Audit

Background

- RHU is the leading Sexual and Reproductive Health Service organization in Uganda.

- In 2010, RHU partnered with USAID to implement the Community-Based HIV and AIDS Project.

- In 2012, through consultants contracted by the LMG Project, the Dashboard was introduced to CBHA project.

- Initially the PEPFAR Management Dashboard was focused on CBHA project indicators.

Why adopt the PEPFAR Management Dashboard?

- The CBHA project was a big project with many result areas.

- The dashboard helps to break the monotony while presenting to stakeholders during review meetings.

- RHU needed a tool that could give a snapshot of key performance areas.

- Multiple result areas needed to be presented to various stakeholders.

Success with the PEPFAR Management Dashboard

- The Dashboard was used in quarterly review meetings for the CBHA project in 2012 and 2013

- Better appreciation of the need to compare indicators against targets

- Graphical presentations helped both headquarters and field staff to identify weaknesses and strength in program implementation.

- The dashboard helped project managers to focus on areas of improvements and develop action plans during the reviews.

Photo: Julius Kasujja

Challenges

- Knowledge was lost due to staff leaving the institution.

- Licensing of the software was a big challenge at the start as the package can only be accessed on licensed version.

- There were many indicators in the project. Deciding what goes into the Dashboard was challenging at beginning.

The Way Forward

- Selected critical indicators among the many to be used.

- Working as a team to generate of the dashboard periodically.

- Involving more stakeholders to understand the use of the dashboard.

- Institutionalized the intervention to ensure continuity.

Photo: Julius Kasujja

Reproductive Health Uganda
50 Years of moving Generations to Reproductive Health

Lira | Kabale | Apac | Kanun... | Summary

Goal Area

1. HIV Prevention

Indicators

1) Total Number of the targeted population reached with ind

DISTRICT LIRA
Programatic Indicators

Legend:
- ■ Target
- ■ Actual

X-axis: Q1, Q2, Q3, Q4, Total Oct 13 - Sep 14
Y-axis: 0, 500, 1000, 1500, 2000, 2500, 3000, 3500
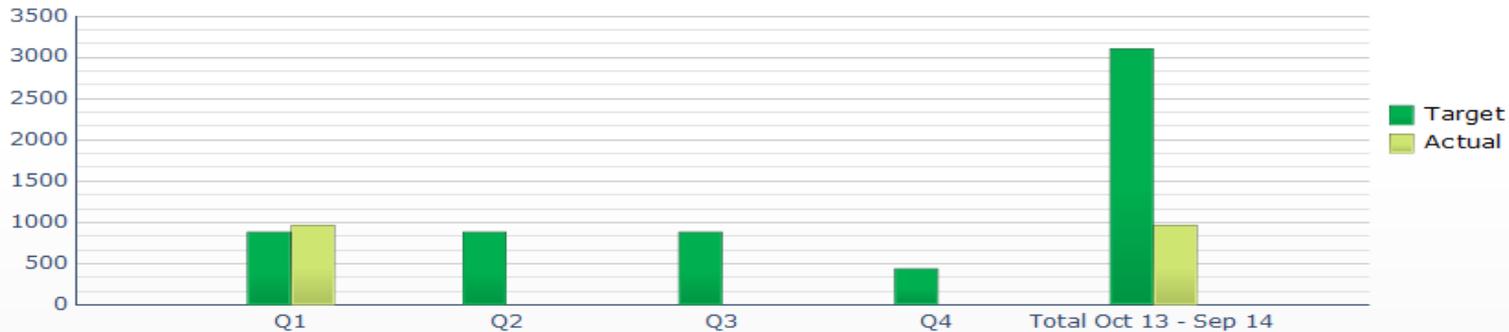
Comments

Working with Peers and Community Resource persons has contributed to realizing slightly beyond the 25% mark at this point in the year. Secondly, this year has 3 active quarters for project implementation - targeting is over 3 quarters.

Performance

31%

Reproductive Health Uganda
50 Years of moving Generations to Reproductive Health
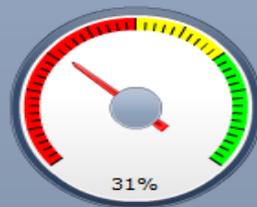
Lira | Kabale | Apac | Kanun... | RHU HEAD OFFICE | AFC | CSL | **Summary**

See Comments

1. Expenditure against Budget.

Expenditure by Budget category

◉ Q1   ◯ Q2   ◯ Q3   ◯ Q4   ◯ Total

SUMMARY
1. Expenditure against Budget.

123%

900,000,000

600,000,000

300,000,000

Q1   Q2   Q3   Q4   TOTAL

■ Budget   ◯ Expenditure

Expenditure by Implementing Partner
Sample Sub Title   ■ RHU   ■ AFC   ■ CSL

700,000,000
600,000,000
500,000,000
400,000,000
300,000,000
200,000,000
100,000,000
0

RHU   AFC   CSL

■ Budget   ■ Expenditure
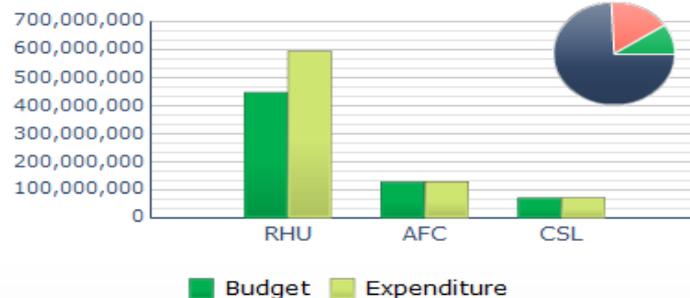
Expenditure by Budget category
Sample Sub Title

123%

80000000
70000000
60000000
50000000
40000000
30000000
20000000
10000000
0

Salary   Fringe Benefits   Travel   Equipment   Supplies   Other Direct Cost   Total

■ Budget   ■ Expenditure
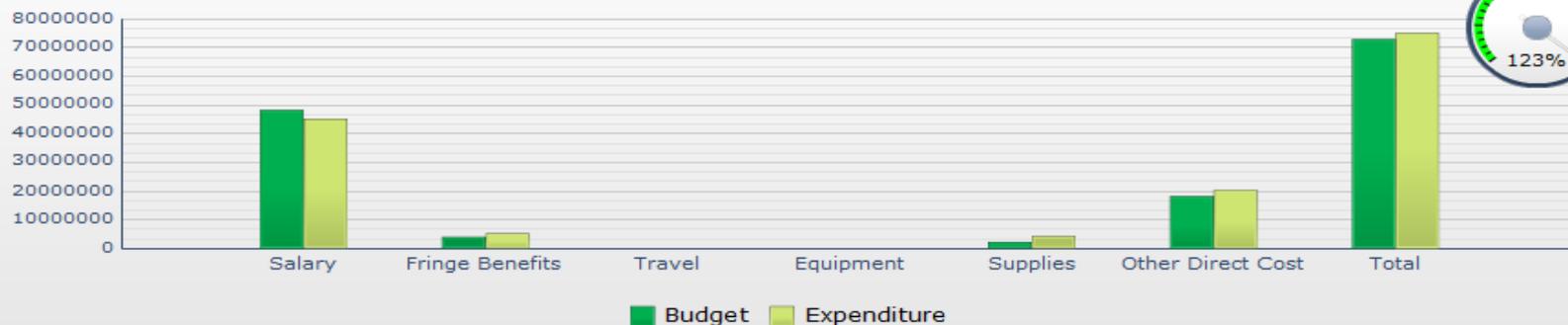
Questions?

Submit questions in the Q&A section in the bottom-right of the WebEx menu.

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