**Handover Note**

**Date:** 12/30/23

**Contract:** Brian Jensen Dec 1, 2022-Dec 31, 2023

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# Work plan and activities conducted

Work plan 1 (Dec. 2022 – June 2023)

A gantt chart with multiple colored squares

Description automatically generated

Work plan 1 (Dec. 2022 – June 2023) A screenshot of a project management

Description automatically generated

# Summary of existing system

The HANWASH M&E system consists of various technical and organizational components. The technical components include the information and software tools, and the organizational components include the people and processes who use these technical components to accomplish their tasks. This section will provide a summary of each of these components along with links to related documentation.

## Key documents

Program Monitoring Framework **(**[**Mattson Program - PMF – Master.xlsx**](https://hanwash.sharepoint.com/:x:/s/MattsonProposal/ERploELozoBFkp9hbosD98cBcY3i4KXpNxx4spbxWAs0rg?e=7poqVT)**)**

**Responsible for updating and verifying the data:** M&E Officer

**Authority for modifying the structure:** M&E Subcommittee

**Data source:**

* [mWater Project Monitoring console](https://portal.mwater.co/#/consoles/818a590d510e40728bc1e969aa98c0db?tab=94064262-a897-48e0-9311-aad75dea41f1) – For validated data entered by the M&E officer
* [mWater Implementation Monitoring console](https://portal.mwater.co/#/consoles/1d080c5b8c154825b446b267319a8288?tab=b934d7de-f4a4-453b-be69-12332b5613dc) – For raw data from the implementing partners

The technical components of the system are derived primarily from HANWASH’s organizational objectives contained in the **Mattson Program – Program Monitoring Framework**. This document defines the key objectives of the organization (Master LM tab) and the Mattson Program (Mattson LM tab). These tabs start from the ultimate objective and split it into smaller, more specific objectives like Intermediate Outcomes, Immediate Outcomes, and Outputs. The term “Objective” here refers to the overall desired results without defining the specific indicators or targets. These objectives are then used to inform a set of indicators which are SMART (Specific, Measurable, Achievable, Relevant, and Time-Bound). The Indicator Framework tab defines the key indicators and provides core information for each (definitions, units, data source, disaggregation, frequency, enumerators, etc.). These indicators are then used in the Monitoring Framework tab, which outlines the corresponding target and actual results for the next 5 years. These targets are further distilled into four key targets, called Performance Objectives tab, which provide a broad overview of HANWASH’s achievements. The Core Values tab highlights HANWASH’s 5 core values which underlie all the work, objectives, and results that HANWASH hopes to achieve.

Project Monitoring Framework([Project – PMF – Template.xlsx](https://hanwash.sharepoint.com/:x:/s/MattsonProposal/EZvfvVULhxhEsfimVmZmRzMB32_rA8N0c6Mp1egIDxh2oA?e=oVUGBq))

**Responsible for updating and verifying the data:** M&E Officer

**Authority for modifying the structure:** M&E Subcommittee

**Data source:**

* [mWater Project Monitoring console](https://portal.mwater.co/#/consoles/818a590d510e40728bc1e969aa98c0db?tab=94064262-a897-48e0-9311-aad75dea41f1) – For validated data entered by the M&E officer
* [mWater Implementation Monitoring console](https://portal.mwater.co/#/consoles/1d080c5b8c154825b446b267319a8288?tab=b934d7de-f4a4-453b-be69-12332b5613dc) – For raw data from the implementing partner

The project monitoring framework is a template which can be used to define and track the target and actual results achieved by implementing partners in the context of a single contract. This template should be adapted to fit each project and contract, then kept up to date by the M&E Officer in the appropriate Microsoft Teams folder. A HANWASH project (e.g. a global grant) may, in fact, contain various subcontracts, each of which has a unique PMF. There should be an overall PMF for the global grant, and a PMF for each of the subcontracts which are made with implementing partners. The indicator values in the subcontract PMFs should sum to the values shown in the project PMF. The indicator values in the project PMFs should then sum to the values shown in the program PMF.

mWater System Design ([Design Specifications.pptx](https://hanwash.sharepoint.com/:p:/s/MattsonProposal/EZC-bg_JazRElspWeqreV4wB-yjAts-ktxNfzOFeZLHNbg?e=jxczSe))

**Responsible for maintaining the document:** mWater Developer

**Authority for approving modifications to the document:** M&E Subcommittee

The Design Specification document outlines the various components of the information system built in mWater, including the database, data validation, and its visualizations. The document provides an overview of the objective of the system which is to provide “an information system for standardized WASH project monitoring”. This includes project, activity and results tracking along with implementation monitoring and sector integration. The system was designed to monitor HANWASH’s Program Logic Model (see Mattson Program – Program Monitoring Framework) but can be used by other non-HANWASH organizations for tracking their projects. Each stakeholder in the system has a different role and specific information needs, which are outlined in the “Stakeholder information needs” section. The “Database – Design” section explains the context in which the system exists and how it fits with other sector systems in mWater like SIEPA. The system consists of several modules including a) Commune action planning b) Project tracking and c) Implementation monitoring. Data visualizations are split out by module (Project monitoring, commune action planning, etc.) and user group (M&E subcommittee, Funders, etc.). The document also contains an annex which explains the nuances of population and access information.

## mWater resources (<https://go.mwater.co/hanwash>)

The HANWASH mWater system consists of various data collection tools, data treatment interfaces, and data visualization consoles. Each of these seeks to achieve a specific set of objectives and are described in more detail in the Design Specification document above.

### Data collection

The HANWASH mWater system consists of various data collection tools which are summarized below (see the Design Specification document above for more detail on each form). The links below display the structure of each data form but cannot be used for collection. Please use the mWater Surveyor app on [mobile](https://play.google.com/store/apps/details?id=co.mwater.clientapp) or [web browser](https://app.mwater.co/) for all data collection (see the Implementation tracking training manual for more information).

**Project tracking**

[Activities Form](https://portal.mwater.co/#/forms/37492cd498894defb9e73be6e45a18e5)- Allows the M&E Officer to enter validated results for HANWASH and commune action plan activities (e.g. inaugurated wells, beneficiaries, etc.)

[Projects table](https://portal.mwater.co/#/tables/ts327/projects) - Allows the M&E Officer to enter validated results for HANWASH activities (e.g. inaugurated wells, beneficiaries, etc.)

[Commune action plans](https://portal.mwater.co/#/tables/ts327/cap) - Allows the M&E Officer to enter validated results for HANWASH activities (e.g. inaugurated wells, beneficiaries, etc.)

**Implementation monitoring**

[Implementation Event Tracking](https://portal.mwater.co/#/forms/76ba0885e88a4c20b8686aa9204acd30) - Allows implementing partners and HANWASH Ambassadors to track their meetings, trainings, and key events (e.g. launch, inauguration, etc.)

[FRAPE Water Point Monitoring](https://portal.mwater.co/#/forms/fad15f51bbf44bb0bf9c36f08887c2dd)- Allows the implementing partners to monitor core water point data (e.g. functionality, management, sanitation coverage, potability, and inspections)

[Household WASH Survey](https://portal.mwater.co/#/forms/eaffb05942c74aa6ab0254d1f848d803)- Allows the implementing partners to monitor household level indicators before and after implementation (e.g. Water service levels, latrines, handwashing stations, etc.)

**Technical reports**

[Well service report](https://portal.mwater.co/#/forms/ece0c01f21a64a748d743465da398cf9)- Allows the implementing partners to report detailed information about services conducted on a borehole well (e.g. drilling logs, pumping tests, pump installation, etc)

[Suivi technique du SAEP (PMO)](https://portal.mwater.co/#/forms/89201bd1414f4049bff60134418e9d5a) - Allows the implementing partners to report detailed information about services conducted on a piped water system (e.g. leak repairs, asset installations, meter readings, etc.)

### Visualizations(<https://go.mwater.co/hanwash>)

**Responsible for maintaining these interfaces:** mWater Developer

**Authority for approving modifications to the interfaces:** The related subcommittee (depends on the page)

The main page for accessing HANWASH data visualizations is HANWASH – Home. This provides a summary and links to each system component for the various user groups. It also includes links to key instructional guides on the system and its usage. This page has a tab for English, Haitian Creole, and French, which should be maintained based on the preferred language of each user group. This be accessed by anyone, even those who do not have a mWater user account. That having been said, various user pages and data consoles are only accessible to authorized users to prevent exposing sensitive information (Confidentiality) and to protect the information from unauthorized modification (Integrity).

Visualization pages available:

* **User consoles**
  + [Funders](https://share.mwater.co/v3/console_link/f47d30038ac94f59af4dc6c38e0dbc7c?share=423d0d71e0e7438984bbed51277c8cfa&tab=9ad5ddbd-cbd3-4ed8-a37a-7a3e48abb0e0) - Allows small and large donors to track the progress and impact of projects they funded.
  + [Haiti Liaison Subcommittee](https://share.mwater.co/v3/console_link/51b8ada6bc9f4da4b11d28838992f250?share=7afee47f1c03477382a757615c4a377d&tab=b934d7de-f4a4-453b-be69-12332b5613dc)  - Allows members of the Haiti Liaison Subcommittee to visualize implementation data.
  + [HANWASH Ambassadors](https://share.mwater.co/v3/console_link/c9eece007a894889bc1ff3a3db696083?share=9d07adeb79d745ec8c0a405850ba8f94&tab=b934d7de-f4a4-453b-be69-12332b5613dc) - Allows the HANWASH Ambassadors to collect implementation data and visualize data submitted by implementing partners.
  + [M&E Subcommittee](https://share.mwater.co/v3/console_link/8674fb4ad32f493eb08dbc6c8f0090d3?share=29b361e72c984bc997f4725da11bd3e7&tab=b934d7de-f4a4-453b-be69-12332b5613dc) - Allows members of the M&E Subcommittee to review all project, implementation, and technical data.
  + [Implementing Partners](https://share.mwater.co/v3/console_link/942a33c795c546f791b0b311ee37414f?share=b00d1f20e15f487f9d3848fcb3a89e7b&tab=64a83413-64af-417f-9899-de180188e483) - Allows members of the implementing partners to track their project implementation.
* **Data consoles**
  + [Project monitoring](https://go.mwater.co/hanwash/projects) - Used for viewing VALIDATED data on projects, activities, and results as reported by HANWASH.
  + [Implementation monitoring](https://go.mwater.co/hanwash/monitoring) - Used for viewing PRELIMINARY data on projects, activities, and indicators as reported by Implementing Partners (PMO).
  + [⁠Commune Action Planning](https://share.mwater.co/v3/console_link/7feb9fb9d6b64ecda89683189371d9ba?share=e94116230f404b1a85084b958e620574&tab=d8efedd2-4c22-4632-a526-3b4d6424fc4b)- Used for viewing commune action plans and all activities happening in a commune
  + [Technical reporting](https://go.mwater.co/hanwash/technical) - Used for viewing detailed technical data on individual services performed by Implementing Partners.
  + [Data export](https://portal.mwater.co/#/consoles/a23fbaed1586480192ff4037596b8582?tab=21ad47b8-c350-45bb-ae4f-a901bca39f34) - Used for exporting data to excel, CSV, or Shapefile for further analysis.

## Training ([All training resources](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/Et7OEFJWQJBAuUEZlp4U4F4B5bc2oOtKfd142nqWnkZapA?e=1znOkN))

This Microsoft Teams folder contains all training resources pertaining to the HANWASH M&E system and its implementation on mWater.

**mWater Database – Overview** ([HANWASH – mWater Database – Overview\_en.pptx](https://hanwash.sharepoint.com/:p:/s/MattsonProposal/EdgI1npuvzdKjSvw3HFqH5QBHDg4Xj5voPvD2XFBOqPeng?e=fpPV7K))

This document provides an overview of the HANWASH M&E system and its implementation on the mWater platform. This document is meant for publicly presenting the system to various stakeholders in a relatively simple manner. This is much less technically involved than the Design Specification document.

User trainings([User trainings](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/Es8S8PvLwwxPsYkeib1wRfEB5kpqmLsJXgoUwd9lrlAMcw?e=KmN7Bx))

The “User trainings” folder provides a set of folders for training materials, sorted by user group. Training materials include user manuals and video recordings of trainings and tutorials.

These folders include:

* [M&E Officer](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/EpJf66J6HmRMp-7pDvSqAicBNmnoRR4HgtWhswHPy3BOjQ?e=oMm5Wh) – 1 user manual
* [mWater Developer](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/Eo9VBhfcTAZMlyes4xYVbeYBUVCrT92FMmKWoXnbJ8ZQZA?e=Q2Cska) - 4 training recordings and 1 user manual
* [Ambassadors](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/Ehd3S1-NQwlEjuUL4NPqYJwBA5FWKBOyhKuq_BHU4Q2DuQ?e=TfIFQ7) – 2 training recordings and a user manual
* [Haiti Liaison](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/EgZt6FtDW-VBpw5qRg3az5MBVkBIrdd4BDbC3ms2EG7zMw?e=gi4q03) – 2 training recordings and a user manual
* [Implementing Partners](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/Ej1_UShGu0xFjk1xCwQ-ME8B1vAUcmnC4ABf0cK9Ccjrqw?e=HjgF7J) – 1 training recording and 2 user manuals
* [M&E Subcommittee](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/EtuL9xj5DrhGu-A4vZknlVMBM_PKY2GXsM10TXskUCzqeA?e=GTMSea) – 3 training recordings and 2 user manuals
* [Other](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/EsCIzuVYszdEli452EApYWYBcWf2h87IzmtrOJxns_T0Kg?e=3wrSlO) – 1 training recording

Module trainings ([Module training](https://hanwash.sharepoint.com/:f:/s/MattsonProposal/EnUW8Ae_fclBlXsqYO39ygIBVEBGop3nBEShFLiA7pzObQ?e=n0qBvj))

This folder contains training manuals on the usage of the various components of the HANWASH M&E system including the Project monitoring, Implementation tracking, and Integration with SIEPA. For more in-depth training resources, please see those provided in the user trainings folders for the M&E Officer and mWater Developer.

These folders include:

* [Implementation monitoring](https://hanwash.sharepoint.com/:p:/s/MattsonProposal/EWV_Gm4n4aRLtzNdOJtPFQ8B5QDeUhjgVbUn1c8CIFNrlg?e=VCLE9U) – 1 manual each in English, French, and Haitian Creole
* [Project monitoring](https://hanwash.sharepoint.com/:p:/s/MattsonProposal/EXmr98V1_L1Nqhzpo6vvPrEBw47x7miEy7OwNwbsVKgfig?e=GnMU3C) – 1 manual for English
* [SIEPA](https://hanwash.sharepoint.com/:p:/s/MattsonProposal/EQ130L3PeepElv9QiIMsQt8BlCQCpC4E7oV6Rrr46-7tdw?e=WkULyR) – 1 training recording and 1 manual in English

# Ongoing challenges

The HANWASH information system has faced and will continue to face various challenges to its continued functionality and utility. The section below outlines each issue and provides recommendations for addressing them.

**Lack of an M&E officer**

Core M&E functions are not being completed e.g. adding/updating projects, updating activities, ensuring quality data. This may lead to the degradation of system’s reliability and utility, as these maintenance tasks are critical to ensuring the collection, quality assurance, and usage of data.

**Recommendations:** Hire and onboard a competent M&E Officer as soon as possible. The onboarding can follow the M&E Officer manual described above. Please ensure a distinction in the roles between the M&E Officer and mWater Developer as these have distinct tasks which very few candidates would be able to fulfill both.

Implementing partners are not meeting with the M&E Officer to ensure that they are on track with their PMF results.

**Recommendations:** Require regular meetings between the implementing partners, HANWASH executive director, and M&E Officer such that they can stay on track with their progress and performance.

**Lack of engagement in the system by Ambassadors**

There is no reporting by HANWASH Ambassadors. They have been trained on using mWater and reporting in the Activities Form, but they have not used it. This means that there isn’t a set of eyes in the field to ground truth the data and hold implementing partners accountable. The data is also not able to be used for planning with local stakeholders, unless it is Haiti Outreach doing this.

**Recommendations:** Decide on a minimum level of reporting and visualization using the mWater system via their smartphone. They should focus on a small subset of tasks which are most important to them and grow their usage from there.

**Lack of engagement in the system by Haiti Liaison**

Haiti Liaison is not very engaged in using the system. They have been trained in visualizing data for each project, but don’t seem to have put these skills into practice.

**Recommendations:** Schedule meetings between the Haiti Liaison, mWater Developer, and HANWASH Executive Director to align on the M&E role of the subcommittee. They should focus on a small subset of tasks which are most important to them and grow their usage from there.

**Insufficient handover and resources for the mWater Developer**

The mWater Developer was provided with training on the many components of the system, but it typically takes much longer to build up experience with the system due to its complex and nuanced nature.

**Recommendations**: Provide long-term assurances to the mWater developer such that they can take a longer-term ownership and vision for the system, as opposed to shorter term contracts which incentivize shorter term thinking and low levels of ownership.

The mWater developer is highly skilled but may have insufficient time to dedicate to system management due to other employment commitments.

**Recommendations:** Expand the amount of time available from the mWater developer.

**Creation of parallel systems by HANWASH members**

Steve Hunt has created a system for project tracking, which introduces a significant amount of management and usage complexity to the system. At least 10 surveys have been deployed, compared to the HANWASH M&E System’s 6 surveys. There is continuous development on this, with very little alignment with the M&E committee. This presents the risk of making the whole system unusable as stakeholders don’t know which forms to complete, as there are effectively two systems.

**Recommendations**: Meet with Steve, the mWater Developer, and the M&E subcommittee to discuss a way forward. It may be that we must put bounds on Steve’s project system, which defines when it is to be used and who should use it. We want to avoid having too many subsystems in mWater, until we have first achieved a minimum amount of usage value from each of those core modules in the HANWASH M&E System.

**Moderate compliance of Haiti Outreach on using the HANWASH M&E System**

HO has provided support at the director and M&E department levels, which is one of the key reasons why the HANWASH M&E System exists. The standardization of HO forms into HANWASH forms was a long process of identifying common questions, structure, and methods. Some of these are in addition to HANWASH methodology.

**Recommendation:** Respect HO’s organizational autonomy but ensure a minimal level of compliance on core M&E functions. Meet with Haiti Outreach’s Director, M&E Director, and Community Development directors to discuss how to do this going forward.

While Haiti Outreach uses most of the forms to a high degree of compliance, they have not starting using the new Household Survey form. Since their “Fom resansman dlo” was deactivated, it’s unclear how they are tracking community beneficiary data.

**Recommendations:** Meet with Haiti Outreach’s Director, M&E Director, and Community Development directors to discuss how to do this going forward. It may be that we should revert to the old method, as it is simpler but less powerful.

**System complexity, making it difficult to collect and manage data**

To match the needs and nuances of HANWASH, the information system was created to be more flexible, which required the creation of various modules to provide for future growth (SAEP technical services, demand letter, etc.) and variances in usage between projects (HANWASH projects, HANWASH adopt-a-wells, HO projects, etc.). This means that the system is complex, which presents difficulties for users in collecting, validating, and visualizing the data. This also presents difficulties to the mWater developer to present the correct data to the correct user group. The system seems to have exceeded the usage and management capabilities of the HANWASH team. This means that the system has not been used to realize the full extent of its potential value.

**Recommendations:** Do not expand the scope of the system (add new modules, data forms, visualizations) until the HANWASH team is able to effectively use and manage the system that exists. It’s preferable to upskill the HANWASH team and streamline the processes for core function so that they can realize the full value of the core system before expanding to include other information in mWater (e.g. project milestones, lessons learned, current events, pilot project documents, etc.).