

Society for Agriculture Health Environment Literary Innovations (SAHELI)
Management Information System (MIS)
STANDARD OPERATING PROCEDURE (SOP)

1. Context

SAHELI has been implementing social development project since 2004 onwards. The project implementation started with the one supported by MANOS UNIDAS, Spain in 2004. Subsequently projects supported by MISEREOR came. Later a few more projects were also being implemented by SAHELI. The last project was granted by Azim Premji Foundation (APF). SAHELI has started using Excel based MIS from 2015 onwards and the practice of SAHELI till now has been developing separate MIS for different project based on the approved project and the findings of baseline studies. Very recently SAHELI joined Goonjen for the MIS for the project approved by the APF. The work of Goonjen is progressing. However, SAHELI requires a common MIS that can be used for all the project implemented by SAHELI.

2. Purpose of this SOP

MIS will gather both quantitative (number) data and qualitative (features) data based on SMART indicators. The broader areas of information shall be the entire programme, selected aspects of human resources, administration, and external environment. Most of the data in these areas will be gathered by the field organisers. These will be compiled by each project head (Project Coordinator) after checking the veracity of data. After checking the data will be entered by either project heads or by another staff person identified for data entry. Data from all projects of SAHELI will be received by a staff at the head office designated as MIS Officer (MISO). The MISO will verify the data received and after the required correction, data for the entire SAHELI will be entered. S/he will generate reports of MIS according to the requirement of the organisation. These reports will be shared with the project heads usually in the beginning of each month or as and when required. The MIS will have provisions to generate particular sets of data-based reports for each module or combination of modules. Once it is converted to software based or computer-based MIS (CMIS) different types of reports can easily be prepared by the MISO. The MIS data and reports are useful for monitoring, evaluation, organisational development and project formulation. A separate computer will be used for MIS management and the MISO is fully responsible for MIS. S/he will keep the data protected with password and on transition or leaving the organisation, the same will be transferred to the person identified by the organisation.

3. Scope

The provisions made in this SOP is applicable to all staff persons of projects and programmes including project heads or managers, members of MIS team and the team of information technology to which the functions of MIS will be assigned, the senior management team or the members of Project Management Committee (PMC) which meets once in a month to review all projects under implementation of SAHELI. The outputs of MIS will be used for raising donor reports, annual reports of the organisation and other occasional reports.

4. MIS Overview

MIS Name: MIS of SAHELI

URL: Will be decided later because ours is not computerised MIS or software supported one

Programs Covered: All projects being implemented by SAHELI, organisational information, the results or impacts that the above projects generate, feedbacks of target groups and responses of secondary

stakeholders.

Geographies Covered: Target areas of SAHELI and Odisha as well as India for comparison with the situation of the target area.

5. Modules in MIS:

Baseline information with details of expected results (activities, outputs, effects and impacts, complete beneficiary profile with criteria for identification, profiles of community based institutions with areas of their involvement, profiles of various support groups created by SAHELI, quantitative and qualitative dimensions of services offered by SAHELI , outputs (results) and dash boards, auto generated reports, list of secondary stakeholders with reaching them as well as results of such reach, various meetings (beneficiaries, support groups, advocacy and support groups), and donor data base.

6. Data Entry Framework (What, Where, By Whom, How frequently)

Steps No	Steps	MIS Module	Type of Data to be Entered	Entered By (Role)	Frequency	Timeline
1	Data gathering	Baseline information	All data on the finding of beneficiaries and project activities	Project Mis persons	Soon after base line study	7 days
2	Cross checking with sources	Expected results	Quantitative and qualitative aspects	Project MIS Persons	Soon after base line	7 days
3	Dummy entry	Beneficiary profile	Name, address, socio-economic background, category, education, needs, expectation	Project MIS persons	Firs immediately after PIP; and later once in a month	5 days each
4	Dummy analysis	Profile of support groups	Name, backgrounds, relation to aspects of programme	Project MIS persons	After creation of support groups and later once in a month	3 days
5	Final checking	Services offered by SAHELI	Quantity, category, expected use, results, situation anticipated after uptake	Project MIS persons	First immediately after PIP and later once in a month	3 days each
6	Classification	Dash board	Key inputs or services, key outputs, quantity and quality of accepted services, Results	MISO, at head office	Regular , at least once in a week	1 day
7	Data entry	Reports	Periodicity, types, contents per type, beneficiaries by type of service and report	MISO at head office	As and when required	2 days

8		Donor data base	Profiles of donors, results of approaching them, what to do the next	MISO at head office	Whenever a new donor is identified	1 day
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7. Reporting Framework (What, Where, By Whom, How frequently)

Name of the Report	Purpose of the Report	What data is expected	Who is the Stakeholder for this report	Who Export the report from MIS	How frequently the Report to be shared	Any specific Timeline
Monthly MIS report	Monthly staff reviews and PMC	All data related to project implementation with results-qualitative and quantitative	All project heads and senior managers	MISO at head office	Once in a month	One day each
Monthly narrative report of projects	Monthly reviews	All data related to project implementation with results-qualitative and quantitative	All project heads and senior managers	MISO at head office	Once in a month	One day
Theme based reports	Periodical as per the requirement	Narrative report with supportive statistical tables	Director and senior managers	MISO at head office	As per requirements	One day
Quarterly MIS report	Once in three months	Statistical tables with analysed information	Director and senior managers	MISO at head office	Once in three months	One day
Quarterly project report	Once in three months	Narrative report with supportive statistical tables	Director and senior managers	MISO at head office	Once in three months	One day
Annual MIS report	Once in a year	Statistical tables with analysed information	Director and senior managers	MISO at head office	Once in a year	Two days
Annual project report	Once in a year	Narrative report with supportive statistical tables	Director and senior manager	MISO at head office	Once in a year	To days
Other reports	Whenever required	Comparison of various module	All project heads and Director	MISO at head office	As per the needs	3-5 days

		and selected modules	along with senior managers			
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8. Roles & Responsibilities

8.1. Field Staff / Case Workers

The data are generated by the field staff who works in the lowest rungs of staff hierarchy and they implement all field level activities. Hence, they are in direct touch with data sources. They gather data and they have to cross check as well as clean data to ensure the reliability of data. They are expected to complete all mandatory fields of information. They can update information on service and follow up regularly on the data. In case of confronting problems, they can directly or through the project head, report the same to MIS Single Point of Contact (SPOC).

8.2. Project Heads (Program Manager or Project Coordinator)

The PH has to is responsible for data in flows and ensure the quality and correctness of the information gathered by field staff. S/he has to verify the data gathered against the primary sources. The data on outcomes as well as closures have to be approved by the PH. The PH can use the project MIS data sheet or outputs for review, decisions and corrections.

8.3. MIS / IT Person or MIS SPOC

SAHELI shall depute one member of IT department as MIS SPOC. The SPOC will have sufficient understanding of the structure, configuration and programmes with which the MIS is developed. S/he is the custodian of the MIS and responsible for the MIS. Maintaining and improving system configuration, manage user access and grant permission to access MIS and trouble-shooting of technical problems, and periodic checking of data as well as correction

9. Data Quality & Review Process [Who what, how frequently]

Name of Meeting	Purpose of the Review Meeting	What data is expected	Who Reviews the data	How frequently the data to be reviewed	Any specific Timeline
Project level meeting before staff review meeting	Review the accuracy of the data entered	All data pertaining to the activities carried out and the related profiles	Project Head and the MIS person of the project	At least once in a month and immediately after new entries are made	One day each fortwo actions
Previous day of the PMC meeting	Accuracy, appropriateness of compilation, statistics worked out, and inferences drawn	All data pertaining to the activities carried out and the related profiles	MISO and MIS SPOC	Every month	1 – 2 days

Previous day of annual review and replan	Make the data across all modules reliable for review and analysis	All data pertaining to the activities carried out and the related profiles	MISO and MIS SPOC	Once in a year	2 – 3 days
Special meetings for evaluation, project formulation	Make presentability of data stored in all required modules	All data pertaining to the activities relevant for the meetings	MISO and MIS SPOC	Days prior to the requirements	2 – 3 days

10. Knowledge Management & Documentation

MIS Requirement document stored at: Programme Drive Link of the computer. All set up documents will be updated and stored, a programme PPT and training videos will also be properly stored for later use.

11. Training & Capacity Building Plan [What, By whom, how frequently]

- **Initial Training Plan**

Initial training will be held once the configuration and designing is over. The person designated as MIS Officer and placed in head office will be the resource person and the entire programme staff of the organisation will be the participants. The duration will be 2-3 days.

- **Refresher Training Plan**

Refresher training will be held once in three months for one day. This will provide opportunities for clarifying doubts and introducing additional features, if any. All programme staff will be the participants.

12. Transition & Staff Change Protocol

SAHELI foresees the chances of employees responsible for MIS in projects and in head office leaving or assuming another responsibility in SAHELI. Such employees will require to hand over the complete and up-to-dated data, MIS protection security codes, and the list of data sharing arrangement before such changes happen. They have to submit a declaration of handing over and the exiting employees must quit the access to the MIS. Only after these these arrangements the transferring employees and the exiting one can vacate the positions they were holding. The new persons, MIS SPOC and programme SPOC assuming the responsibility of MIS will be trained afresh and in that training the transferred employees can play an important role. It is expected that the transferring of responsibilities and training of new employees assuming responsibilities will require 7 to 12 days.

13. MIS Governance & Ownership

The director shall be the owner of MIS. MIS SPOC shall be identified a staff member who has aptitude to MIS and experience in managing MIS from among the staff members. The same principle will be applied to identify MIS SPOC in projects and in head office. Similarly, a senior programme person will be identified as programme SOP

14. SOP Review & Updates

This SOP will be reviewed in every 12 months and the review updates will be approved by the Governing Body. The version of the SOP incorporating reviewed sections will come into force once the Governing Body give its assent.

15. MIS Partner/Platform contact details

The MIS SPOC will share the details of MIS partners or platforms where SOP is going to be shared.

16. Conclusion

MIS is not a data entry arrangement. Programme tracking, developing analysed tracking, raising reports, and decision making across all modules are also included in MIS. Thus, MIS contributes to research, learning and generating foundation for new programmes.