

Effective Use of Remote Monitoring in the COVID-19 Context

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The COVID-19 pandemic threatens the delivery of humanitarian and development assistance and makes monitoring difficult. As in-person data collection risks spreading the virus, remote monitoring has become urgent and more relevant. Nevertheless, remote monitoring has its limitations, and it is important for managers to understand how remote monitoring compares to other types of monitoring and consider how to mitigate its key limitations. This concept note identifies practices for mitigating these limitations and implementing remote monitoring approaches more effectively.

Monitoring Approaches and Data Collection

To understand the limitations of remote monitoring, it is useful to compare it with other approaches, including in-person or limited contact monitoring. Table 1 compares data collection possibilities, from in-person monitoring in permissive environments to remote monitoring in inaccessible and nonpermissive environments.

	IN-PERSON MONITORING	LIMITED CONTACT MONITORING	REMOTE MONITORING
WAREHOUSE 	<ul style="list-style-type: none"> • Observation of warehouses • Verification of stock and item specifications and inventory • Documentation review • Interviews with staff 	<ul style="list-style-type: none"> • Observation of warehouses • Verification of stock and item specifications and inventory • Documentation review • Remote interviews with staff 	<ul style="list-style-type: none"> • Documentation review • Remote interviews with staff
DISTRIBUTION SITE 	<ul style="list-style-type: none"> • Observation of distribution sites • Verification of food and non-food item specifications • Interviews with implementing partner staff • Interviews with key informants (e.g., camp manager, community leader) • Exit interviews with beneficiaries 	<ul style="list-style-type: none"> • Observation of distribution sites • Verification of food and non-food item specifications • Remote interviews with implementing partner staff • Interviews with key informants (e.g., camp manager, community leader) 	<ul style="list-style-type: none"> • Remote interviews with implementing partner staff • Remote interviews with key informants (e.g., camp manager, community leader)

This paper was prepared by MSI staff to contribute to the discussion and understanding of the important development challenges facing policymakers and practitioners

	IN-PERSON MONITORING	LIMITED CONTACT MONITORING	REMOTE MONITORING
COMMUNITY LEVEL – POST DISTRIBUTION 	<ul style="list-style-type: none"> • Interviews with beneficiaries • Interviews with nonbeneficiaries • Observations 	<ul style="list-style-type: none"> • Remote interviews with beneficiaries (if contact information is available) 	<ul style="list-style-type: none"> • Remote interviews with beneficiaries (if contact information is available)

Potential Limitations of Remote Monitoring

The following are key limitations of remote monitoring.

- Exclusion of the beneficiary perspective. Beneficiary contact information may be unavailable, implementing partners may not be able to share it due to privacy/confidentiality concerns, or beneficiaries may not have access to technology to provide input. Lack of the beneficiary perspective makes it difficult to assess key aspects of assistance, including:
 - Whether the assistance received was relevant to beneficiaries' needs and provided at a time when beneficiaries needed it most;
 - Beneficiaries' satisfaction with the quality of assistance received; and
 - Beneficiaries' experience in receiving the assistance, including respect for their rights and protection from violence, abuse, and exploitation.
- Lack of observations. Not being able to conduct an in-person observation at a distribution site or facility makes it hard to assess whether site managers are properly organized and whether food and non-food items being distributed meet the agreed-upon specifications.
- Fewer data points. Even though it may be possible to interview beneficiaries and relevant stakeholders, remote monitoring is likely to limit the number and types of data collected. This makes the process of triangulating findings next to impossible.

MONITORING THE IP'S RESPONSE TO COVID-19




Remote monitoring can also be used to assess whether and how the delivery of assistance is being modified to respond to the COVID-19 pandemic. This can be supported by limited contact monitoring, including observation of distribution sites and relevant facilities. Consider measures related to risk mitigation, staff, beneficiary safety, etc. that IPs have introduced in the wake of the COVID-19 pandemic. What challenges and constraints have they faced in:

- Managing distribution sites, including crowd control and organization of space;
- Communicating guidance to staff, beneficiaries, and stakeholders;
- Training implementing partner staff;
- Assisting more vulnerable beneficiaries;
- Ensuring the safety and security of staff and beneficiaries;
- Applying risk mitigation measures, given available material and equipment; and
- Reprogramming (e.g., are partners increasing the amount of water being supplied to communities and adding relevant items such as soap in the kits distributed)?

Addressing Limitations






Managers can consider the following practices to mitigate the limitations of remote monitoring.

1. **EXPLORE THE FEASIBILITY OF LIMITED CONTACT MONITORING.** In some cases, remote monitoring can be supplemented with limited contact monitoring. Proper training, use of personal protective equipment, and social distancing practices may allow limited contact monitoring to be conducted safely. Table 2 summarizes opportunities for limited contact monitoring.

LIMITED CONTACT MONITORING FOCUS	MONITORING OPPORTUNITIES
<p>FACILITY LEVEL</p> 	<p>A trained field monitor can visit facilities (e.g., warehouses, mobile health clinics) during off-hours to observe the condition of the facilities and to monitor available equipment and supplies, item specifications, and inventories against actual stock.</p>
<p>DISTRIBUTION LEVEL</p> 	<p>A trained field monitor may be placed at a pre-identified safe vantage point to observe how well a distribution site is organized (for both food and non-food items), including whether the distribution is organized in a manner to mitigate potential COVID-19 risks.</p>
<p>WATER DISTRIBUTION POINTS</p> 	<p>A trained field monitor may be placed at a water source or distribution point to observe whether the water is being delivered (trucked) on time and is being properly chlorinated.</p>

2. **CAPTURE BENEFICIARY PERSPECTIVES.** The following practices enhance the likelihood of capturing beneficiary perspectives in a remote monitoring context.
 - 2.1. Request that implementing partners share beneficiary contact information, while protecting the information and using it only for the purpose of data collection. Implementing partners are well within their right to refuse to share this information. Developing protocols for protecting beneficiary confidentiality may encourage some implementing partners to share that information.
 - 2.2. If possible, work with relevant local stakeholders (e.g., local authorities, camp management) to obtain beneficiary contact information, as these stakeholders are often engaged in the registration and selection of beneficiaries.
 - 2.3. Use the snowball approach. This entails speaking with a few individual beneficiaries and asking them to recommend other beneficiaries to contact and interview.
 - 2.4. Give beneficiaries who are exiting distribution sites the option of participating in a short phone interview or online survey (e.g., through short message service or WhatsApp). Beneficiaries can complete the survey after they exit the distribution site. To increase participation rates for these types of interviews, consider offering beneficiaries a small incentive (e.g., phone credit).
 - 2.5. Add the contact details of the independent monitoring team to the implementing partner's communications explaining the protocols for complaints and feedback (e.g., posters and kits).
 - 2.6. Include in all beneficiary instruments an optional question about their willingness to be contacted in the future. Beneficiaries who agree to this may be contacted over time for specific remote monitoring efforts.
 - 2.7. Where every household receives assistance (blanket distribution/service), randomly pick community residents as part of the monitoring process. This requires phone numbers (obtained through local vendors or phone companies) or a community directory.

3. **IDENTIFY AND CAPTURE ADDITIONAL PERSPECTIVES.** Consider conducting interviews with stakeholders and/or identifying additional stakeholders who can provide useful perspectives on the relevance and effectiveness of the assistance being provided. Though not a substitute for beneficiary interviews, interviews with other stakeholders can offer some in-depth information. Table 3 provides examples of additional stakeholders to consider.

SECTOR/MODALITY	POTENTIAL RESPONDENTS
VOUCHERS / MULTIPLE SECTORS 	<ul style="list-style-type: none"> • Vendors • Implementing partner staff who monitor the selected vendors
BAKERY SUPPORT / FOOD SECURITY AND LIVELIHOOD 	<ul style="list-style-type: none"> • Bakery staff • Bread distribution agents/suppliers
MOBILE DISTRIBUTION AND ASSISTANCE / MULTIPLE SECTORS 	<ul style="list-style-type: none"> • Vendors/suppliers • Drivers delivering water, fuel, food, and non-food item kits • Mobile health clinic staff
ESSENTIAL SERVICE PROVISION / MULTIPLE SECTORS 	<ul style="list-style-type: none"> • Facility staff (e.g., from health facilities, water department, community centers) • Camp management and staff
DELIVERY OF ASSISTANCE / MULTIPLE SECTORS 	<ul style="list-style-type: none"> • Implementing partner staff, including those employed by local partners, day laborers, and short-term cash-for-work beneficiaries • Community leaders and organizations involved in registering or selecting beneficiaries

4. **SIMULATE REAL-TIME OR PHASED FIELD VISITS.** Where technically possible, a phone, Skype, or WhatsApp interview with a relevant stakeholder can include observation. For example, during a remotely conducted interview with a facility staff member (e.g., health, warehouse, or camp staff), the interviewer can ask the respondent to share geotagged photos or videos of specific items, documentation, or practices. If technical issues prevent interviewees from doing this in real time, modify the approach to allow interviewees to send visual information within a designated time after the interview.
5. **ENGAGE SUBJECT MATTER EXPERTS.** When conducting remote interviews with key stakeholders, engage subject matter experts (e.g., in protection, health, or water, sanitation, and hygiene). Experts can easily understand technical information shared during an interview. They also can respond simultaneously and follow up with additional prompts and questions.

6. **INCORPORATE COMMUNITY MONITORING.** The community can help oversee the assistance being provided. Community-led monitoring may be done on its own. During remote monitoring, community-led monitoring also may be integrated into other approaches, such as interviews of the panel of beneficiaries over time or interviews of additional stakeholders (such as vendors, facility staff, or representatives of the local authorities).
7. **USE REMOTE MONITORING TECHNOLOGY.** Which remote monitoring instruments and applications are best suited to the situation at hand? The decision tree below can help make that determination. Also, adjust the data collection instruments (simplifying them, if necessary) to focus on the most critical learning needs.

Picking the Right Remote Monitoring Instruments

