 

SITE MONITORING METHODOLOGY

Overview

# Introduction

The site[[1]](#footnote-1) monitoring methodology outlines a systemic approach for capturing essential information about displaced communities residing collectively in various locations. This can include spontaneous settlements, planned camps, collective centres, hosting arrangements/villages, rented accommodation. The key information captured includes locations (place names and geographical information), population numbers, existing facilities and needs/gaps in assistance. Information on the site monitoring system can be found at :

The site monitoring methodology details the processes involved in establishing a multi-sectorial assessment, which is repeated frequently, to monitor and inform of the current situation in sites. The methodology can be applied to both rural and urban settings but does not cover scattered displaced populations which cannot be logically grouped collectively to direct assistance and protection. The information collected over time will give an indication of changes in the conditions of the sites and also the changing needs of the displaced population.

The methodology consists of 5 key steps which are repeated for every round of site monitoring:

1. Data Collection
2. Data Entry, Cleaning and Storage
3. Analysis and Report Generation
4. Dissemination
5. Feedback

# DATA COLLECTION

The data collection process contains three main sub-components:

* Development of a data collection plan
* Design of the site monitoring questionnaire
* Establishment of a data collection team.

These three stages may need to be conducted simultaneously to ensure the monitoring is implemented as quickly as possible, particularly after the onset of an emergency.

## Data Collection Plan

It is essential to develop a data collection plan to answer key questions on:

* Number of enumerators needed and the time required to monitor all sites
* Frequency of data collection
* Field coordination/logistics and security issues
* Questionnaire dissemination and collection
* Involvement of cluster/sector partners and displaced communities
* Relevant technology to be used
* Funding requirements

It is important the first round of data collection is conducted as quickly as possible with a basic questionnaire, to establish a baseline set of information on the sites.

It is highly recommended mobile data collection technology is used to increase the speed and accuracy of the data collection process.At present, Kobo is the preferred tool for mobile data collection through the UNHCR Kobo server (<https://kobo.unhcr.org>). A number of different mobile application can be used to collect the data GeoODK (<http://geoodk.com>) which has the ability to re-edit collected data, Kobo collect (<http://www.kobotoolbox.org/tags/kobocollect>) or ODK (<https://opendatakit.org/use/collect>).

## Site Monitoring Questionnaire

The site monitoring questionnaire should be developed in consultation with all relevant stakeholders. For IDP contexts, active clusters/sectors should be consulted according to their area of expertise and for refugee operations the technical focal points coordinating each sector should be consulted. The questionnaire should at a minimum capture site names, locations, population data and some sector indicators. The questionnaire should be context driven and follow the naming standards developed by UNHCR for fields used. Current link to examples of questionnaires: <http://data2.unhcr.org/en/working-group/2?sv=0&geo=0>

The steps for development and deployment of the questionnaire are outlined below:

**Step 1:** Develop a draft questionnaire with suggested set of questions.

**Step 2:** Share the questionnaire with relevant cluster/sector members and stakeholders and obtain feedback to develop the finalised set of questions.

**Step 3:** Develop the questionnaire in an electronic format (e.g. Kobo) or paper-based depending on the context. Questions should be either yes/no, date formatted, single choice, multiple-choice or numerical, with little or no free text to ensure answers can be aggregated, calculated and analysed.

**Step 4:** Disseminate to chosen enumerators and provide training as necessary.

## Data Collection Teams

Data collection should involve government authorities, cluster/sector partners and other humanitarian actors wherever possible, to ensure the site monitoring is fully supported.

All data collection teams/enumerators should receive training on:

* How to identify and engage with key informants – e.g. camp managers/committees/sub-committees, displaced persons and service providers.
* Understanding and answer each question correctly
* Recording accurate location information (e.g. taking GPS coordinates)
* Completing and submitting the data collection forms correctly

If necessary, specialised training on a particular sector (e.g. Protection) can be organised to ensure these questions are answered accurately. If GPS coordinates are to be used, training on how to take coordinates with either GPS devices or mobile phones should be provided. An alternative to taking GPS coordinates is to use the Google Maps/Google Earth and other similar products to locate the approximate location of the relocation settlements.

# Data entry, cleaning and storage

## Data Entry and Cleaning

**Step 1:** Collect all questionnaires from the field, using focal points as necessary to speed up the process. If mobile data collection was used, the procedures entry and collection should be simpler and already automated, skip to step 3.

**Step 2:** For paper-based questionnaires, develop an electronic form (Excel, Kobo, Surveymonkey etc) for data entry to ensure answers are entered in formats which can be easily analysed.

**Step 3:** Once all forms have been received, data should be checked and cleaned. Enumerators can be contacted to verify answers. For mobile data collection, move the collected forms into Excel for data cleaning.

**Step 4:** Check with Protection colleagues (UNHCR and/or cluster) and senior management if any information would be considered sensitive for release.

## Data Storage

The simplest tool to use for data storage and analysis is Microsoft Excel. The Site Profile template (developed in Excel) can be used for both data storage and analysis, as can be predesigned to exactly match the questionnaire and produce site profiles for each site. Current link to the Site Profile template: <http://data2.unhcr.org/en/working-group/2?sv=0&geo=0>

If the number of camps/sites are very large then an alternative database can be used such as MS Access, MySQL, Microsoft SQL, PostgreSQL etc.

# Analysis and report generation

Analysis of the all sites should be conducted aggregating:

* Types of site
* Status (open/closed/planned)
* Population figures (disaggregated totals for sex and age, where possible)
* Site locations by district/sub-district

Since the site monitoring is a multi-sector assessment, analysis should also be conducted for each cluster/sector (Shelter, WASH, Health etc). The analysis should compare the actual situation in the sites with international standards (e.g. Sphere standards), or agreed upon contextual standards. When the site monitoring has been conducted multiple times, a comparison can be made between each assessment to show the change in conditions of the sites.

If the Excel based Site Profile template is used, then site profiles and dashboards can be automatically generated for each cluster/sector. Other data analysis software can be used for the same purpose e.g. Power BI or Tableau.

A core set of products should be produced from the site monitoring exercise (software recommendations are in italic):

1. **Site Master List:** simple list of sites with names, location and populations - *Excel*
2. **Site Profiles (Offline):** produced for each site with all relevant information pertaining to that site. Use visualisation where possible (graphs, charts, tables etc.) and create finalised PDFs – *Excel, Adobe Illustrator, PowerPoint.* Current Site Profile template: <https://www.dropbox.com/sh/pytj5m2swdbxh13/AABWUcLymzPrbRI_KlzHcUXPa?dl=0>
3. **Site Profiles (Online) also known as OPSMAPs:** can be requested through the FICSS/CCCM HQ, through global agreement with CartONG. The profiles will also include and online interactive map.

Examples: <http://maps.unhcr.org/en/irq_cccm_fsmt_map>

<http://maps.unhcr.org/en/irq_cccm_rapid_rasp>

1. **Sectorial Dashboards (Offline):** Analysis of important indicators for each sector – *Excel, PowerBI,*
2. **Sectorial Dashboards (Online):** Can be developed on Github where the code is freely available  
   Examples: <https://cccmiraq.github.io/FSMTdashboard/>  
   <https://unhcr-xborder-turkey.github.io/ISIMM/>
3. **Site Maps and Detailed camp maps (offline PDF):** maps showing all sites should be produce. Depending on the number of sites assessed, multiple maps may need to be developed showing the breakdown by district/sub-district – *QGIS free version, ArcGIS desktop, Tableau, PowerPoint, Excel*
4. **Online Map** – interactive maps should be developed which allows humanitarian actors to access information on each site – *ArcGIS Online, CartODB, GoogleEarth, Leaflet/OpenStreetMap.* This can be incorporated with the online site profiles (see above).
5. **CCCM or UNHCR website/web portal –**For both the CCCM cluster and UNHCR operations the Operational Data Portal (ODP) should be used to host all relevant information related to the emergency. Any online and offline products should be hosted on the ODP as the main website for accessing information from the site monitoring (e.g. site profiles, site maps, online maps, dashboards etc)

# DISSEMINATION

The site monitoring information should be distributed to a wide audience, so all actors are well informed and can make decisions based on timely and accurate information. Coordination for clusters in IDP contexts, and sectors in refugee contexts will rely heavily on the type of information collected in the site monitoring. In many contexts the site monitoring will be the key tool for providing population figures by location, which is the most commonly requested information in humanitarian crises and provides the backbone to any humanitarian operation[[2]](#footnote-2).

The site monitoring information can be posted directly on the Operation Data Portal for easy online access (linked to Humanitarianresposne.info). The information can also be distributed through email lists and printed handouts at coordination meetings.

# feedback

The site monitoring is a continuous process which is to be undertaken on a regular basis, therefore after each round of site monitoring it is possible to review and refine the exercise. The information should be analysed to determine its effectiveness and relevance, mainly based on feedback from humanitarian actors who use the information. The questionnaire, analysis/reports can be redistributed after each round of site monitoring to gain feedback from the relevant clusters/sectors. The questionnaire can then be revised according to this feedback so new questions can be added as necessary and redundant questions removed. However certain questions will need to remain constant, as they need to be measured for each round of data collection so analysis can be conducted over time to measure change. Feedback and changes will mostly reflect the evolving nature of the context. Feedback from enumerators is also important to determine if there were any difficulties in obtaining information and improve the procedures to make each round more efficient.

1. The term “site” will be used throughout this document to refer to various places where displaced communities are collectively residing, these places may also be referred to sometimes as “camps” or “settlements”. Although many CCCM documents use the word “camp”, there may be sensitivities involved in some countries when referring to camps. Therefore, the terms “site “or “settlement” is preferred. [↑](#footnote-ref-1)
2. Humanitarian Profile Support Guidance (May 2016) [↑](#footnote-ref-2)