Session Description: This session will focus on ways that two project funders track data on project performance and conduct evaluations to inform portfolio management, project management, and create more value for their partners. Case studies include a focus on systems-thinking and feedback loops to optimize for impact.

Panelists:
- Diana Harbison, US Trade and Development Agency
- Lauren Reed, Qualcomm Wireless Reach
- Moderated by: Genevieve Edens, ANDE

QUALCOMM PRESENTATION

Background on Qualcomm:
- Designs chips in software for mobile devices
- Believes mobile devices have power to do much more to improve lives and invests worldwide using the company’s core technologies
- 113 programs in 46 countries with 650+ stakeholders, reaching 8.4M people

Qualcomm M&E framework
- Dashboards for programs and portfolio, quarterly reports
- Three levels:
  - Monitoring and process: During a project
  - Outcomes: Not causal, but shows change
  - Impact: Shows causal product benefits

Example program: China Wireless Heart Health
- Technology: ECG-sensing smartphone
- Barriers to scale: No info on user satisfaction or granular use data
- Qualcomm solution: Developed an end-user survey.
- Findings were positive
  - Ease of use was high
  - Cost of care to patients was 6x less than traditional ECG delivery
  - Perceptions of data management improved
  - Patient care outcomes: Examined more patients, made more diagnoses, more accurate diagnoses
Usage and functionality: Providers wanted more sensors/leads from machine to patient
Some call center obstacles

Connection to overall M&E approach at Qualcomm
- Qualcomm provides recommendations to funding recipients regarding where they can have real impact and scale
- Uses aggregate indicators across company, including reach indicators and partnership indicators
- Also has customized indicators per project, focused on outcomes and outputs.

USTDA PRESENTATION
- USTDA Background
  - Works exclusively in emerging economies, and in energy, infrastructure and communications
  - Activities: Conferences and reverse trade missions, fund grants for project planning, like feasibility studies, pilot projects, TA and Global Procurement Infra (does not finance infra itself)
- Outcome example: Generates $74 in investments for every $1 in budget
  - Wasn’t always this high
  - Strategic planning process in 2008 determined that USTDA should prioritize more in determining what work to pursue
  - After prioritizing, saw portfolio-level rise from ~$30 to $74.
- Uses a unified set of development impact indicators across projects in priority areas (e.g. increased access to electricity, improved locomotive fleet, job supported, GHG emissions reduced etc.)
- Project example: Power Africa
  - 10 gov’t agencies involved. Challenge to isolate USTDA impact from other agencies’, as USTDA acts on the front end (planning stage)
- Approach to M&E
  - Design
  - Monitoring throughout project
  - Portfolio management to:
    - Forecast results
    - Manage results
    - Diversify or focus investments in real time

Audience Q&A:
- How do you approach attribution vs. contribution?
  - Looks at role of USTDA funding in wider context of other actors’ activities or support
    - First investor, tipping point
  - Qualcomm doesn’t feel it needs to make causal claims to take credit, but often “footnotes” methodology for those interested in the methodology details.
- How do you undertake data sharing with partners?
Qualcomm: concerns about privacy and legal barriers can make it a challenge.

- **What are the mechanics behind aggregating your indicators?**
  - USTDA: Don’t need fancy software. Uses excel, and has for a long time had an outdated USG DOS database
  - Qualcomm: Giving presentation tomorrow on Salesforce. Uses ClickView for data visualization. Important for data developers to understand context of your project

- **How do you do targeting and lead from behind?**
  - USTDA: Doesn’t use the word “target”, instead uses “potential.”
    - USTDA’s approach includes
      - What is the intervention?
      - Goal?
      - What will occur along the way?
      - How to ensure those occurrences don’t interrupt work?
      - How to extend reach?
      - What can’t you control?
  - Qualcomm: Works with partners to set targets that work for them.
    - Sometimes partners that aren’t experienced set targets that are far too high or low, and Qualcomm helps to adjust as project results roll in.
    - Systems are set up to be flexible.

**Key Takeaways:**

- Both organizations use real-time monitoring during projects, post-project evaluation to learn, and aggregate indicator results to organization-wide level.