Rethinking Qualitative Evidence in the Age of AI: Decentralizing Decision-Making in MEL - June 02

@6:27 - **Akshay Roongta (ooloilabs.in)**

I'm Akshay. I'm one of the co-founders at Dots. Along with me are my colleagues, Yashna and Pratiksha. Yashna is also co-founder at Dots, and Pratiksha leads and supports our work around knowledge building and sharing.

Yashna and I both have backgrounds in design, research and strategy, and our careers have been largely in the social impact space, looking at working across various domains.

We've been building DOTS for the last seven years, and before that, we were doing independent consulting with various non-profits in India and around the world, and some of the insight that we're sharing today with you is from all of those conversations, projects, various kinds of research and mapping we've done, and hope that this is valuable for you.

So, let's dive right in. I think one thing we'll kind of anchor right at the start of this conversation is what do we mean when we say qualitative data, right?

And I think because what we've found is in our various conversations, people seem to have different definitions of what is good enough qualitative data, and we'll come back.

So to this in a lot more detail later, but at a very basic level, you know, qualitative data is collected largely through open-ended responses where you give any stakeholder, whether that's somebody who's a research participant, community member that you're working with, team members, other partners, collaborators, etc.

But where there is space for them to give you unstructured data. So essentially, like in a nutshell, that's what we're talking about.

Of course, as we go through this presentation, it's going to become a lot clearer what we mean. So to start off with, just for you to kind of think about where does your qualitative data go after collection in your work, where we assume that, you know, you're working in an organization or you're a consultant or you work.

with organizations on MEL to inform various things, what happened? So I'm just going to put a poll up. I hope you can see this.

And, you know, just have a, you know, go at this. Don't worry about, you know, getting it super precise, but do share, you know, where does your qualitative data go?

Does it go for reports, you know, quarterly, annual summaries? Does it go for, you know, donors? I've asked for it.

That's why you're doing it. Does it go for evaluation studies? Or, you know, for team discussions, purely informal sharing?

You don't know. And this isn't as strange as it might seem. We've spoken to teams where they collect qualitative data, and they're not quite sure what they do with it, or what they want to do with it, or there's something else that we don't know.

And so in the spirit of, you know, what Thank We talk about, please do share what that other might be, you know, in the comments, tell us, so three people have said others, please do share what that other might be, that would be really valuable.

So we're getting a response saying it can inform knowledge products, our call data goes into Notebook LM nowadays to analyze it with our team.

But, maybe a question to Bass is what happens to that analysis? But, that's a fair response, it goes into Notebook LM for analysis.

I think almost everybody has voted, I'm guessing the three people left are Yashnamie and Pratiksha. So I'm going to, oh no, no, okay, it's not counting us, the host.

So there are three people left, if everybody has done academic publications and contributing. So I'm going to end the poll now.

One thing is, remember what you answered, we'll come back to it at the end. So I'm going to end the poll here.

And I'm just going to quickly share the results so everybody can see. So we see a tie between annual and quarterly summaries or reports and evaluation studies.

Those are the two top ones. Donor requirements and team discussions come in a close second. and then others and we've got a few lovely points in chat so thank you so much for that and we'll come back to this later I'm just going to save this right so you know one of the things that we encounter a lot especially when we speak with monitoring and evaluation teams is a lot of decisions are made using quantitative data and are refrained after

In all our conversations is that quant tells you the what, qual tells you why. So if we think about, let's imagine an education program, you know, very often a quantitative data might show attendance has dropped or training has been completed or, you know, classroom engagement score in one, you know, region is 3.2 on 5 and, you know, somewhere else it's 4 on 5.

But what does that mean, you know, and the qualitative data, the analysis of that could show you, you know, why parents don't feel that the program is relevant to their child, right?

It could, when training is completed, qualitative data could help you understand what teachers actually changed in their classroom or, you know, where they struggled to do it.

And when it comes to classroom engagement, you know, why students in one district are more engaged than another and what are all the different factors that might affect that.

But what we... seen repeatedly is that organizations plan quantitative systems with a lot of rigor, but qualitative data is still an afterthought.

It comes in as an additional layer very perfunctorally towards the end of the planning or design process. So essentially, we see this as a planning gap to begin with, right?

So we deeply plan quantitative data. We think about indicators up front. You know, in our theory of change, very often, we're actually defining indicators.

We know that we need to do baselines. How often are we going to do certain measurements? And of course, we build dashboards, you know, but we very casually plan qualitative data.

Sometimes you want to collect a few anecdotes to, you know, punch up the reports. Stories might be captured by the comms team for, you know, various donor reports, etc.

need to add a nice little . It's and a quote, it's not thought of in a structured manner, and there rarely is a consistent format of frequency, right?

And that's what it mostly is. It's an afterthought or a comms team add-on. But what we've seen is happening is that a lot of data has been collected.

It's not the right data. We're not sure how it's used because field teams are collecting the data. They're sending it up to the MEL teams to analyze.

The MEL teams are creating these fantastic reports. But the reports or the insights from those go directly to donors and leadership, right?

We saw, you know, such a large number of you voted around how it goes for reports, etc., or for donors.

What it doesn't do is inform micro-decisions that are happening on ground, that are happening every hour, that are happening every day by program teams, by field supervisors.

You know, are we able to share the relevant data back with them to be able to make those decisions?

And I think that's what is the crux of what we're going to be talking about today, that a lot of our systems around data are reporting systems.

They're designed to report upward, right? So data flows up. So M.E.L. are, you know, unfortunately holding insights that they're not able to share it to ground the relevant stakeholders.

And usually these reports are happening in a very long cadence, you know, long frequency, over quarters, half years, you know, annually.

Whereas learning systems, if you're designing, sorry, whereas if you're designing learning systems, the idea is that the insights are available at every level, they should be available when somebody is trying to make a decision.

And And they should be available in a form each person can act on, which means that sometimes that's not, you know, just a numerical indicator or a bar chart.

And so that's something that we're going to talk about a lot more today. How do you build these systems?

How do you think about these systems where insights and evidence are, you know, reaching the right people at the right time?

So, you know, one of the questions we often get is, yes, yes, we understand all of this. So, how do you actually bring qualitative data into processes?

And I think the key is that you have to start with the right intent. And the question that you have to start with is, what decisions do we want to make?

And, you know, a corollary to that question is, what do we need to understand? Whereas most MEL conversations, we're generally talking about just the E in the MEL, the monitoring, evaluation, and learning, which is just measure.

planned manner whereas what we found is if you do it uh early if you do it intentionally and you you know deeply weave it into your plan uh it can the inside the evidence that comes out can be insightful extremely actionable and it can reach the people who need it most i think the key is to ask that question right we have numbers for certain things uh and do we need all those numbers we're collecting so some rationalization

But for these numbers that we're collecting, how are we going to answer the why? How are we going to understand that second layer, that third layer underneath the number to really understand why a number is trending up or trending down or even staying the same?

And so coming back to what we mean by qualitative data, what sorts of qualitative data we've seen organizations collecting?

So one is short-form data. All qualitative data doesn't have to be IDIs and focus group discussions or, you know, key informant interviews.

It can be, you know, adding open-ended responses into your survey. So if you're asking somebody, you know, rating a particular aspect of your program, asking them why they've rated it like that, right?

If you're doing a round of training, giving an open-ended space for people to share feedback using things like WhatsApp or others.

You know mobile you know apps such as IVRS or SMS to collect open-ended responses and if in many cases nowadays you know social impact organizations also build apps and platforms ensuring that you integrate some of the latest tools that allow you to collect that qualitative data short though it may be you can collect it at volume.

Of course you can have ongoing long-form data so routine field visit notes your program team goes out there they're sending you routine notes are they filling in a very specified format which is a reporting format or are they also sharing things that they've observed that they've experienced challenges that they see or that they've overcome and one of the key things that we've seen that helps is to have spaces in which community members and staff can share their experiences and through stories through open-ended unstructured formats that they share at a regular

And I'll go into this in a little more detail in a few minutes. Lastly, you can have focused research efforts.

These can be around specific questions. So they can be in-depth interviews, focus group discussions, using other participatory research methods.

And these are usually more rigorous, they're slow, and they don't necessarily feed real-time decisions, but they do round out all the other data that you might be collecting.

I just want to bring a little bit of attention to this idea of experiences from community and staff, partly because we really favor this also as a very interesting form of data collection, because that's how we started DOTS as a storytelling platform.

Our idea is that stories can be a very potent vehicle for, you know, really capturing people's experiences, their challenges, or the way they've overcome those challenges.

We've seen partners do this in very different ways. But essentially, it comes down to the same thing, which is how do you give a space where periodically, you know, at a regular cadence, people can share what they've experienced in the last week, fortnight, month, and, you know, to give an open space to be able to do that, but to support them in doing that.

The beauty of, you know, various AI tools today that are available means that you can help them tell that story, nudge them by engaging them in conversation, allowing them to simply upload voice, you know, notes, so they can be meandering in their thought, but you can then have that transcribed and translated and then pulled into, you know, analysis as well.

So, this allows us, you know, some of these new tools allow us to do a lot of that, and we'll share some of that with you when we demonstrate some more ways in which you can use technology to do this.

But, you know, I think we've talked about why do qualitative data, when you should do qualitative data, but coming back to the crux of this webinar today is how do you decentralize decision-making?

How do you distribute intelligence? Suppose you do have a situation in which you are continuously collecting qualitative data, along with your quant data, of course, we're not saying one is better than the other.

They work well in concert. What happens when every level of your organization has the insights and the evidence that they need?

What that could mean is that every role, because they're making different decisions, they could have the data to make those.

So somebody who's a field staff or a volunteer on ground might be able to say, you know, who needs support right now amongst the community members that they're working with?

What are those community members struggling with, right? And that's because the data is coming through, IVRS reported. A story is or a helpline that we analyze, it could be their field supervisor, so what issues are starting to emerge in their team, who in their team is doing something innovative and doing something really well, a regional lead, somebody at a state level or a district level, you know, will be able to see which area is consistently struggling.

Is there structured capacity building that's required across the members of their team? What topics, you know, might that That be needed in?

Who's really doing well in their area? A program lead, somebody who's looking at a program nationally, for example, or across the organization, is going to be picking up on details like how the program needs to adapt?

Are there specific interventions, those really small interventions that are having outsized positive outcomes? And that maybe the quant data shows that, but the key is what about those interventions is really making that difference, right?

That's it. That's what's going to come through in the qualitative data. For the leadership, more broadly, is the strategy, is their strategy, a broader strategy working?

Are there signals in this qualitative data for the next phase of the program? Because you're collecting things that are outside your current M.E.L.

framework, you could see what emerging systemic issues are that they need to tackle soon, and that might help them chart the next five-year plan that they create for their organization.

But all of this has so far been fairly theoretical, let's jump into an actual case. So this is a case study that we've set up, where it's synthetic data, but it's a fairly typical program that we've seen in India.

Again, we're using education as a domain, as an example, usually understandable by most people in the sector. So this fictional education nonprofit.

They pay. PARTNER WITH STATE EDUCATION DEPARTMENTS IN INDIA TO DEPLOY NON-ACADEMIC CURRICULUM. ESSENTIALLY THEY'RE TRAINING TEACHERS, THEY'RE BUILDING THEIR CAPACITY AROUND SOCIAL EMOTIONAL LEARNING, BETTER CLASSROOM ENGAGEMENT, YOU KNOW, TECHNIQUES, STUDENT WELL-BEING.

SO, YOU KNOW, HOW DO YOU DO THESE VARIOUS TECHNIQUES IN THE CLASSROOM TO DO THAT? THE SCALE IS ABOUT 300 GOVERNMENT SCHOOLS, 1200 TEACHERS ACROSS DISTRICTS, ACROSS THREE STATES.

IN EACH STATE, THEY'RE WORKING IN THREE DISTRICTS FOR FOLKS NOT FROM INDIA, ESSENTIALLY A DISTRICT, YOU COULD CALL THOSE AS COUNTIES, ESSENTIALLY, IT'S THE SUBREGIONAL UNIT.

AND THIS IS NOT A LINE FROM THIS FICTIONAL NGO, BUT WE'VE HEARD IT OFTEN ENOUGH. WE'VE GOT A LOT OF DATA, BUT WE CAN'T CLEARLY EXPLAIN HOW OR WHY CHANGE IS HAPPENING, OR WHERE THAT CHANGE IS HAPPENING, DEALLY SOMETIMES.

I'M GOING TO HAND OFF TO THE ASSENAL IN JUST A MOMENT. Just want to explain to you how this organization is structured.

There's the org leadership. They have a program lead looking at this particular program. So, they are program leads for other programs they run.

And each state has a state lead. So, the states in our case are Madhya Pradesh, Rajasthan, and Odisha. And each district has a facilitator.

And for those who might know these names, we have three districts in each state. Yashna, over to you.

SCREEN SHARING: **Yashna started screen sharing - WATCH**

@26:36 - **Yashna Jhamb | Dots**

Super. Thanks, Akshay. Yeah, I think what I'll do, Akshay shared what does it mean to decentralize and democratize decision making.

But what I'll share is how we're doing something like this on the platform DOTS that we've used for multiple organizations working in the MELs.

Spaces, using this data for different stakeholders and actually how does this decentralized decision making actually look like. Starting from data itself, Akshay shared a bunch of qualitative data types.

It could be short form, long form, it could be experiences and stories from the ground as well. The idea on our platform is to import as well as collect all types of different kinds of qualitative plus quantitative data.

What you are seeing here are different kinds, but let's start with like a register, right? You start at a register where your teachers in a program, you have your teacher data, your student data, your classroom data, which is somewhat fixed.

And that becomes like your repo and a register to link all your different data sets with. It's especially when it comes to qualitative data, it's important.

To think about those linkages well in hand, because your call is not that structured, but if you make sure that it's tagged to the right state, county, block, school, it becomes so much more powerful for you to later analyze for different stakeholders.

So, essentially, start at a register stage, and then build off by importing all different datasets that can, on the platform, what you can do is simply import, you have it on your Kobo, bring in a CSV, upload a CSV, simply add that to the platform.

What the platform does is processes an Excel or a CSV, essentially identifies what are the different headers for, and processes it, it's saying that this needs to be a particular single selection, it has that intelligence to identify what kind of field is this.

And essentially, can just simply import all that data on the platform. What you can do is also directly import and set up those continuous linkages with Zoho, if that is the main way of collecting data.

And say, if you've not established any workflows already, the platform also allows you to collect data. Now, the data collection can be both qualitative and quantitative, which could be something like the teacher practice adoption survey, right, or a baseline endline reflection.

So that could be a mix of qualitative and quantitative responses. I could add in numbers, I could add in rich fields.

But what I wanted to share, because Akshay really focused on the experience and story part, right? Is how do you collect self-reported qualitative data?

You can always do that in research, you can always do that in interviews, and I think all of you might know.

I that very well, but the important aspect is when somebody is reporting, and I want to use that data for my daily reflections, weekly reflections, monitoring, evaluation as a part of like having all your weekly data as a part of evaluation.

When that comes, how do you self-report? And what we've done is just an example of a template like this of capturing stories from teachers.

So when you break that down as context, challenges, that's the first level. I want to get a story from somebody or an experience from somebody, and I say, oh, I want to capture challenges, but the important aspect is hints, right?

Within the challenge, what do you want them to share? Can I give them those triggers if I'm on the ground?

How would I ask questions, and can I use a form like this to essentially push those questions forward and get those responses of like what was difficult or not working as expected?

How are students responding at the point? How So, there's a way to probe, even when it's a self-reported thing, and a lot of organizations at this point are using something like this to get in a lot of data from the field.

We have ways of integrating a WhatsApp chatbot also to get in all this data. So, that's something which is important to understand on how we can get a lot of call data from people, and at the same time, import all these other data sets that you might already have, and then build an entire story of merging call and cont, essentially.

So, once the data comes in, what is possible on a platform like this is, of course, get a sense of what the data looks like.

And for an M.A.L. officer, for an M.A.L. team, you can always get a sense from just seeing what are people saying.

So, in this case, seeing that there is... Um, people have reported, um, trained practices adopted as few of those options.

Your AI can actually do a decent job to categorize the data at a glance. And all this is to essentially get overviews of what people are reporting.

So how did you adopt the practice to your classroom? What are people sharing? What are teachers sharing for that question?

You can start getting categories. You can start pulling summaries of what people have started saying. So there is a lot of initial overviews that AI does well.

And we're talking about, since we're talking about AI in most of these conversations, AI definitely gives you the overviews quite well.

And you can pull in those insights at a glance as your data is coming in, as your data is pulling up.

But how we also use AI is essentially at this level, I could simply, um, go deeper into my fragments.

So my, uh, qualitative data. My data can be rich, my qualitative data can be bite-sized, whatever form it is, each of each fragment holds some value of your themes and tags, and thematic coding is something that people, I'm sure here, know, so I won't go in the depth of it, but what the platform and what AI can help with is definitely a first version of how and what the themes are, what do that qualitative nuance fall into, and what we have as the ability to directly run annotations based on a coding framework that is set up on the platform.

But let me take you through where this loop actually completes, is not at a point that, oh, AI has suddenly analyzed.

The point for AI to be placed here is to fasten the process. It's not to say humans cannot analyze.

What we have on the platform is, what this stage, how can that editing of tags... And reviewing of data happens through humans.

So it's a layer of saying that, hey, this doesn't fall into my category, or I want to edit my tags and change the way this looks like, and always use that as a lens to look at data.

So for us, and how we have looked at AI is basically, how can the effort reduce, not say that remove the human lens?

It's really important to do a human review at each stage. So there's a provision and how you look at that data.

But before we go in the depth of how do you use these annotations and highlights that we've gone into for an M.A.L.

officer, I think what I wanted to talk about is how do you discover data for different stakeholders? Exactly bring in that point of Akshay's, of decentralizing decisions.

How do you bring that lens back? So now that this platform is available, all the data is in one place.

lens. lens? stating that still They What we have set up for this hypothetical case is basically for a facilitator or a sub-regional officer.

In this case, Bhopal is a district or a county in India. And what you see on the screen is what does it, what do I as a facilitator in Bhopal need to see and what is relevant to me?

And what can be done by an MAL team is set up that view for each of those field officers for different stakeholders.

And let me take you through what does it mean for a field officer in Bhopal, right, facilitator in Bhopal.

So for them, there are 20, for a field officer, they're managing about 21 teachers. And their average shift in participatory methods of the whole program looks like this.

But for Bhopal, it is 1.18, which is above average, right? So they get a sense of how is their district doing.

What their region doing? And then there is a comparison of sub-themes and themes emerging across MP, which is the state, so district being the sub-region of that, and then talk about what is showing up for Bhopal.

And what we've pulled up is that learnings from and used AI here added it up to all the quant as well and the quantification of the qualitative data, and said that what have students said about participatory methods in the classroom, give the summary with this filter of Bhopal that we've applied, right?

Same, what are teachers reporting as key issues? Again, a filter of Bhopal, so each district officer or a sub-regional officer sees data as per what is relevant to them.

If we change this lens to somebody at the state level, and as a state level, I need to see all my districts.

And look at how my state is doing as opposed to a program level, I can do those comparisons, right?

So I can say three, this is like a program scale student participation score. This is at the state level.

These three are at different district levels and I can see how a district is performing. And you can see, say, this particular district called Jabalpur is higher than another district called Indor.

So I could then say, okay, what are the insights in Jabalpur versus Indor? I could go and see, okay, what are teachers doing well when it comes to adoption practices in Jabalpur?

And what are some key observations and struggles in Indor? So I could compare that as a narrative and this data keeps updating as my program is going on.

So I could keep seeing that learning and seeing what changes, how does this score changes over time and view this dashboard at all times.

Because as a state-level officer, also, I need that decision-making. As a facilitator, also, I need that decision-making. And it can't be left only to programs.

But coming to the program lead, this is an overview of what it might look for a particular aspect around teacher behavior, teacher adoption, teacher practices, for a program lead, right?

And probably specifically focusing on teachers. And this, essentially, is like an average score of before and after on emotional safety.

The same is for participatory methods. You can see, okay, what teachers' adopted practices are the most. You can look at the themes and sub-themes division.

You can look at the categorization. And at the same time, you can look at all the fragments or information that has been tagged to teaching practices and changes in one go.

And always apply a filter. At any point to really say that I just want to go into a particular state or a particular county or a particular block or really get into a particular teacher's ability or a group of teachers ability and see all this data.

So that's a way of giving access to different stakeholders for them to be able to take that decision on ground.

Another way is often a very common way of looking and using AI is through this whole chat interaction. And what I've done in this is I've applied a filter of that district already and then asked a question.

So I can actually narrow down my ask, not just like by asking a question, but really filtering it down to whatever district block or teachers that I want to filter.

And then ask a question like, what are the issues reported by teachers in this particular district? And that's what has come up.

I can view the references and actually see. So this fear around hallucination is something we tackle with by saying...

Show the top references and actually go to that data. So a person can review a lot of this as they are reviewing that data sources.

Coming back to, and I hope that's clear on what all can be done, and this is literally scratching the surface when it comes to giving those micro decisions to the, and giving that ability to see the data and then give it ability to take those micro decisions when it comes to different stakeholders.

But just on the other aspect of actually using call data for program leads or for MEL leads, the platform essentially gives this ability to see all possible, like as your data is coming, it gives you those important research findings that are essentially coming from your data.

And you can always see this on as time goes by, right? So in this case, I can see a critical issue that classroom crowding and language barrier limit teacher effectiveness, and there has been all this evidence stating that I could see where are the sources of this data coming from and get to those insights deeply.

I can also see the top positive topics, top negative topics, go in the depth of this, go look at classroom infrastructure and language barriers, find out the insights from this, go in that depth.

And if I don't want to look at overviews, there is provision to actually go way deeper into my highlights.

So all the annotations that have happened on the platform through AI, through human review process, all this comes in one place for an NAL officer to see, okay, what has showed the most.

Emotional safety has showed up the most. And also comfort in speaking up for students has shown up the most.

Can I go deeper into a particular region and find out what is happening in a particular region? Or really go and focus in a particular thematic and find out what's happening in a thematic?

I could go deeper and deeper and find out co-occurrences. And there's a lot more which is on the platform which we won't go in the depth of, but basically bringing that lens of how different stakeholders and their ability to analyze data, how does that play out on a digital system like this?

And it can be done through multiple ways, multiple formats. But the idea for us today was to share how something like this can work on the platform dots.

But bringing in back on what Akshay was sharing. Before going that, I'll just actually, Akshay, if you can share the slide, I'll take you through.

SCREEN SHARING: **Akshay started screen sharing - WATCH**

So this is an example of Maker Difference. Maker Difference is not-for-profit working with volunteers and students, and volunteers essentially share knowledge to students, and that's the format.

I won't go in the depth of that, but the team on On ground, essentially, are the volunteers and community officers.

And this is an example, it's not the real data or the exact representation, but just to share how they're working is, they have a volunteer dashboard very similar to what we shared.

They have a community officer dashboard to see aggregates, but this volunteer dashboard essentially says what does an attendance look like for me, of my students.

What is the city average, what does the change in score of children look like, and at the same time, they're using AI quite beautifully, where they're sharing the highlights of actions taken by the volunteer themselves, and the learnings from fellows around.

So how do you learn from others, how do you reflect on your own journey, and how do you make sure what is the score change for different children within their realm.

So it's just a representation of what are we doing with them, but also quite powerful in sharing how that decision making and decentralizing of data happens when it comes to, when you actually break down, okay, what does a volunteer need to see, what does a community offer need to see, and what does a program team need to see, and then look at the data.

Back to Akshay, on the deck.

@44:56 - **Akshay Roongta (ooloilabs.in)**

Thank you so much. So, So, coming back to, you know, zooming back out, I think what, you know, Yashna took us through is how we've thought about an organization using how they can use dots to do a lot of the things that we talked about in the first part of the webinar that, you know, about qualitative data, about distributing decision-making ability.

But, you know, coming back to the broader piece, right, what do you need to do, right? You need to be capturing data continuously, and that does not have to mean only one type of data.

It could be field observation notes, it could be reflections from staff, from the community members, from various stakeholders that can come through WhatsApp, through various kinds of mobile input.

It could come through open-ended responses and surveys. It could come from partner or secondary data, and these are just five.

Kha. Raja, Raja variables through which all

of your data sets can connect to each other uh and and for you to be able to then uh get these broader pictures um the other part of it is you know how do you then structure this unstructured qualitative data usually textual data right uh one is of course the metadata that i've talked about but the other is you know how do you tag it how do you label uh you know that data through annotation and that's where uh you know uh one ai can have uh some support uh in this process to help

ᴀĸuraya Sajidimana, Khaiblor, Fatiha, on this right uh the fact is that if you just have transcripts or uh this unstructured textual data where you've not done uh annotations properly where you haven't looked at fragments and then tagged those fragments properly it essentially uh might mean that those insights or that evidence doesn't exist because you haven't really made that particular sentence or that fragment fundable or

Comparable to another one. And as soon as you start structuring your data that way, it allows you to search across sources because you're using the same architecture across all of these different data sources, right?

What it also does if you have the right, you know, metadata around when that data came in or when that data is referring to, you can then start doing temporal tracking, which means that you're able to then say, hey, what were some of the trends or patterns that emerged in the last month or the last quarter as opposed to the quarter before that or the year before that, right?

And that sort of structuring at different levels is a very, very critical piece. Lastly, I want to really hit this point home, right?

The field coordinator wants to see something very different from the same evidence, right? Because they're making decisions in a very different way, right?

The district lead might be making a very... very different decision as opposed to the state lead and then the leadership or the program lead, depending on what your organizational structure and decision-making processes are.

Really quickly, I think Yashna talked about how to connect the quant and the qual. I think too often we have this conversation or this strange tussle between quant or qual.

We're saying, hey, it is not either or, it's an and conversation. How do you make these two work together?

Which again, you know, if you've structured correctly, if you've collected data in a comprehensive manner, you can start doing some of that quite well.

Lastly, what AI can help with is around pattern detection. It can help with some temporal analysis, mixed method queries.

But the key in all of this is that you can't simply say, here's my data, give me some insights.

The questions have to be far more targeted. for you to be able to get uh that sort of an output uh and these aren't one thing i'll just reiterate these aren't magical uh thinking machines these are large language models they are dealing with words statistically uh so

you know please remember that uh when you know you uh work with these tools so you know using your own judgment uh in using these tools is very very uh critical uh uh lastly you know what's changed today right uh before these llm or ai tools were available to us you know we had too many responses so sometimes teams didn't collect enough qualitative data or even if they did you know they didn't have the ability to really sit down and manually uh code that data right uh you need analysts uh scores and dozens and you know hundreds of analysts to deal with that quantum of data and that's why and that's

Insights arrived slowly, you know, quarterly, if they arrived quarterly at all, and what is happening is AI is helping to change a lot of that.

can process evidence continuously, you can see patterns as they surface, any team member can query the evidence, because you can query it through language, as opposed to building really complex dashboards, and, you know, insights are available in various review cycles, right?

And so, what that allows you to do is to have that learning distributed across the organization. Let's come back to something that we talked about right at the beginning.

What we've seen is there are four levels of organizational in terms of their learning maturity. Some organizations, they're collecting data, it's living in spreadsheets, maybe some reports and folders.

The second level, they're compiling and reporting the data upward, at least insights are reaching leadership and donors. The third type.

type. Profundum is where the evidence is being analyzed. It informs program decisions in some form of real-time. But like that fourth level is where it's distributed.

Evidence and insights reach every decision-maker at every level, from the field staff to the leadership. Now, let's come back to that poll question that we had.

I just want to share the results again. I hope you can see that. in the view of uh you know uh what we had talked about uh 24 out of the total number uh out of you know this uh group had said that it informs reports donor requirements and a large number on evaluation studies very small number talked about team discussions and a few of you had other formats and many of them were sort of internal use for learning right

So just want to kind of reiterate that many organizations are at level two. They're trying to break through to level three.

Our hope is that, you know, some of the insights that you gathered from the conversation today, right, will help you start breaking through into level three, and hopefully level four, either by using our tool or by developing your own systems in your organization.

We'll now open up for any questions that you might have. And just want to offer that you can get in touch with us.

And we love doing mapping sessions with organizations, and essentially, helping organizations figure out, map out, you know, what data they're collecting across programs,

you know, what decisions each level might need to make, where is the evidence, what they're going to you know, what.

Getting Stuck, and where can AI help, and, you know, whether DOTS is the right fit or not, we put the, put our information on the screen, we'll just share that with you here as well, and other than that, happy to take any questions that anybody might have at this point, and thanks to everyone who stuck around until the end of the presentation.

Please do share your questions in chat, we'd love to answer them, I think we had a couple of questions already, we'll be sharing a lot more through the questions in case we didn't cover something in our presentation, which I'm pretty sure we missed a lot.

@55:09 - **Yashna Jhamb | Dots**

Have we missed any questions in chat already? Maybe we've answered. Okay. Yes, Jayesha. Jayesha.

@55:22 - **Jayesha Koushik**

Hi. Hi, Akshay. Hi, Yashna. Thanks for the session. I was at the previous session as well, the one a couple of weeks back, and we had discussed the different capabilities of the platform.

I think here we discussed the different levels of decision making and data collection. I just wanted to know, like, more about the...

I think last time we had discussed how different team members can also code data. Like, it can be analyzed by multiple.

So, is there any... As far as I know, coding... is at this point a specialized skill, like only a few people do it.

Is there any sort of support for developing that capability in teams or like guidance? Like you have survey templates.

Is there any guidance with like a code book that might work for, you know, say an education NGO with the kind of case that you mentioned?

Would the dots team support with any of that?

@56:27 - **Yashna Jhamb | Dots**

A hundred percent. So what we discussed last time was a research use case, the webinar you attended, where we also assume there are a lot of researchers who understand have that ability, right?

What we're talking about right today is more of an not-for-profit or a larger organization using it as a overall systemic data collection and analysis.

In these cases, we definitely do support in how do you think about what a themes manager or like code book?

And that's why you haven't gone in the depth of it, of that part today, because those are things that we support and how from a research objective, you come up with a tags manager or a code book.

So we also have some systems and ways of coming up with the first level of structure, and then that's reviewed by or not for preference.

There's a lot of support on that front for sure, because that becomes a foundation of inside generation.

@57:30 - **Jayesha Koushik**

Yeah. So yeah. Yeah, absolutely.

@57:32 - **Yashna Jhamb | Dots**

Yeah. But we often don't do that for research orgs, because we know they have a way of thinking.

@57:37 - **Jayesha Koushik**

Yeah. Yeah.

@57:38 - **Yashna Jhamb | Dots**

Thank you. Also, just in case somebody is interested in such stuff, right, what Jayshah brought up, there are multiple use cases and multiple applications of the tool.

And we've only covered or three. The business. covered… A small like for a not for profit in use case in case you're interested in others happy to also get on a call and do a demo focused on a particular use case.

Any other questions? I think I will be able to speak it better than what I've written there.

@58:48 - **Nupur Biswas**

So I am a young researcher. I've always pursued research in design, but I'm still learning and I think it will be always.

Like that. My worry with qualitative data is also the capability. There is also a junk part of it. There is always a false part of it and that can also get captured, right?

How to build systems around identifying those or is that even a thing like?

@59:22 - **Yashna Jhamb | Dots**

You mean the noise of the data, right? There could be data which may not be included. So there are systems, we are also working on those systems, not saying that there's like a 100% solution for it.

But generally, a lot of it gets cleaned up in that process that what Jaisha was also talking about. We didn't bring up the code book and the way to look at data, the way to tag data.

A lot of the noise, even human lens, if you take that human route or you take the AI route, both ways can be dealt with.

Because you have ways of identification of noise, and when you do that at scale, course, AI is trained, and there are some mechanisms that we can talk about in depth that happens, but there are ways to identify noise over signal, and that's something we are also doing a lot of work on signal versus noise, and then fleshing on that, but a lot of it is managed through your tagging system.

So just giving you a gist of how and how do you define your tagging system, a lot of that gets cleared up.

Yeah.

@1:00:31 - **Nupur Biswas**

Thank you.

@1:00:36 - **Yashna Jhamb | Dots**

There was something on privacy, I think that got answered. Yeah, we have a privacy document, it's not on our website yet, but we can share once you write to us.

Happy to share that. Alright, if there aren't any more questions, we can close the room, but we are really thankful to you all for joining and listening to the approach around decentralizing decision-making.

ACTION ITEM: Email attendees recording + resources; include contact for privacy doc - WATCH

@1:01:25 - **Akshay Roongta (ooloilabs.in)**

Thanks, Vijay.

@1:01:26 - **Yashna Jhamb | Dots**

We will share the recording with everybody.

@1:01:29 - **Akshay Roongta (ooloilabs.in)**

We'll be sending an email out to everyone with the recording and, you know, some other resources where relevant. Thank you.

And please feel free to get in touch. We are happy to kind of get into mapping, conversations, answering any more questions you can find.

For sure. Thank you.

@1:01:53 - **VJ | C4EC**

Thank you so much. Thank you so much.

@1:01:55 - **Akshay Roongta (ooloilabs.in)**

Have day, afternoon, evening, depending on where you're joining us from.