GB ENGLISH VERSION

Webinar 3
Data Management for Impact Indicators

From Manual to Digital and Advanced Technologies

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Data Management for Impact Indicators

From Manual to Digital and Advanced Technologies

Building reliable, proportionate and scalable data systems

- Data challenges & sources
- Data quality & validation
- Manual → Semi-digital → Digital
- Digitalisation roadmap
- Advanced technologies & proxies

Webinar Objectives

What you will learn and be able to do

Session Objectives

- Build reliable indicators from heterogeneous and incomplete data systems
- Understand the evolution: from manual to digital, then to advanced technologies
- Identify the main data sources available to Agri-PDBs
- Choose solutions proportionate to your institutional capacity
- Define a realistic digitalisation roadmap for impact data management

By the end of this webinar, you will be able to:

- Identify key challenges: data quality, reliability, traceability and costs
- Compare manual, semi-digital and digital collection approaches
- Understand the role of technologies (platforms, mobile apps, remote sensing, GIS, satellites)
- Define simple data validation and quality control processes
- Design a realistic digitalisation trajectory aligned with your capacity

Why impact data remains a challenge?

The 5 structural obstacles that hinder impact measurement in Agri-PDBs

1 Heterogeneity

Data scattered across silos (credit, operations, field) with no common integration. Each system speaks a different language.

2 Completeness

Missing or incomplete data for smallholders, informal value chains and geographically remote areas.

3 Quality

Data entry errors, inconsistent definitions across portfolios, no standardisation of field collection forms.

4 Traceability

Difficult to link financing disbursed to outcomes observed on the ground—attribution and additionality problem

5 Cost & capacity

Time-consuming manual collection, high field survey costs, limited human and technical resources in institutions.

These challenges are not insurmountable—they define the starting point of a progressive journey

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Available Data Sources for Agri-PDBs

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Map what you already have before deciding what you need

1. Internal Information Systems (MIS / SIS)

- Client files, credit history, repayment records
- Portfolio data: sector, segment, amount, tenure, collateral
- Internal project classification taxonomies

2. Credit & operations databases

- Loan application forms (borrower socio-economic data)
- Post-disbursement tracking: expected results, collateral, costs
- Field agent data from client visits

3. Field surveys and collected data

- Beneficiary surveys (sampling, KPI outcome measurement)
- Reports from institutional partners: cooperatives, MFIs, aggregators
- Case studies, focus groups, qualitative field data

4. External & institutional sources

- National statistics: NSO, ministries of agriculture and water
- FAO, World Bank databases (LSMS, ESS, AQUASTAT)
- Weather, satellite, environmental GIS platforms (Copernicus, FAO EarthMap)

Priority: leverage existing data before investing in new systems

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The Continuum : from Manual to Digital

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Three maturity levels — choose the right level for your institution

Level 1 — Manual

Starting point

Methods:

- Paper registers and field forms
- Centralised Excel data entry
- Standardised collection forms
- Quality control: supervisor review

✓ Advantages:

- Low initial cost
- No technology prerequisite

⚠ Limits:

- Frequent entry errors
- Difficult and slow consolidation
- Long reporting timelines

For: Institutions starting out or areas without connectivity

Level 2 — Semi-digital

Transition (most Agri-PDBs today)

Methods:

- ODK / KoboToolbox mobile forms
- Collaborative Google Sheets / Airtable
- Advanced Excel dashboards (Power Query)
- Semi-automated rule-based validation

✓ Advantages:

- Reduced data entry errors
- Near-real-time centralised data
- Moderate cost ($0–500/year)

⚠ Limits:

- Network connectivity dependency
- Field agent training required

For: Most Agri-PDBs — good cost/benefit ratio

Level 3 — Digital & Tech

Advanced target

Methods:

- Integrated MIS/ERP platforms (YAPU, Mambu…)
- Remote sensing & satellite imagery (NDVI, CHIRPS)
- GIS for georeferenced impact mapping
- Automated parametric models

✓ Advantages:

- Real-time reporting
- External data integrated automatically
- Independent verification possible

⚠ Limits:

- Significant initial investment
- Internal technical expertise required

For: Mature institutions or those accessing green finance / GCF

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Economic KPIs: new trends and concrete examples

From measuring volumes to measuring transformations — what funders now require

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ECONOMIC DIMENSION — 3 emerging trends with data collection details and institutional examples

1. Financial inclusion of new clienteles

KPI: % first-time formal borrowers (new-to-credit borrowers)

Formula:
No. of new clients without credit history ÷ total new clients × 100

Why:

Measures access to first formal credit — proof of additionality required by IDA, IFAD, AceliAfrica

Documented example:

AceliAfrica (East Africa)

48% of loans = first-time borrowers in Year 1 — origination bonus triggered

Source:

Client MIS data + agent declaration (dedicated field on opening form)

2. Leverage and catalytic effect

KPI: Financial leverage ratio

Formula:
(Private co-investments + beneficiary contributions) ÷ Agri-PDB amount

Why:

Demonstrates efficient use of public funds — required by KfW, EBRD, GCF for sustainability bonds

Documented example:

eco.business Fund (Latin America)

3:1 ratio — every € invested mobilised 3 € of additional private co-financing

Source:

Disbursement financial data + co-investor reporting (standardised form)

3. Value creation in agricultural value chains

KPI: Producer price premium (% vs spot market price)

Formula:
(Price paid to producer − local market price) ÷ local market price × 100

Why:

Proves real net income improvement — key IRIS+ indicator PI1568, required by IFAD and social bond instruments

Documented example:

Crédit Agricole du Maroc (olive oil value chain)

+12% average price premium for beneficiaries integrated in certified cooperative

Source:

Buyer price data (partner cooperatives) + market price from national statistics (public source)

Key message: economic KPIs are measured from existing credit data — the additional collection cost is minimal

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Social KPIs: new trends and concrete examples

Gender, youth, food security —indicators required by funders, measurable with your data

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SOCIAL DIMENSION—3 emerging trends with data collection details and institutional examples

1. Women's empowerment (gender lens)

KPI: % financing to women-led or women-benefiting enterprises

Formula:
No. of loans (woman primary borrower or 50%+ women beneficiaries) ÷ total loans × 100

Why:

2X Challenge standard (IFC) —eligibility condition for Social Bonds, EIB GENDER funds and CGAP

Documented example:

FIRA Mexico (2024 Framework)

Women first-time FIRA credit beneficiaries —social KPI announced in the Sustainable Bond 2024 framework

Source:

Loan application form (borrower gender field) + use declaration (% women beneficiaries)

2. Youth employment & generational renewal

KPI: % youth beneficiaries (<35 years) supported

Formula:
No. of borrowers/beneficiaries <35 years ÷ total beneficiaries × 100 — disaggregated by gender

Why:

SDG 8 (decent youth employment) —required by IFAD/FIDA, World Bank (IBRD), AFD for youth value chain projects

Documented example:

Aceli Africa (Year 1, 2022)

63% of portfolio met ≥1 impact criterion (gender, youth, food security) —triggering incentives

Source:

Date of birth field in client MIS — automatic age calculation at loan date

3. Food security & household resilience

KPI: % beneficiary households with improved Food Consumption Score (FCS)

Formula:
Households with FCS ≥ acceptable (score >35) post-intervention ÷ total surveyed households × 100

Why:

SDG 2 (zero hunger) —key proxy for IFAD, WFP and GCF in smallholder portfolios —alternative: HDDS (dietary diversity score)

Documented example:

IFAD / OFID —Sub-Saharan Africa projects

FCS improvement measured via 15% sampling survey —survey cost: $8–12/beneficiary with ODK mobile

Source:

Beneficiary survey (10–15% sampling) — standardised FAO FCS form (7 food groups × 7-day frequency)

Key message: social KPIs use data already collected (age, gender) or low-cost sampling surveys ($8–12/beneficiary)

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Environmental KPIs: new trends and concrete examples

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Soils, water, carbon, biodiversity — from direct measurement to parametric proxies validated by funders

ENVIRONMENTAL DIMENSION — 4 emerging trends: KPI + measurement method + institutional example

Agroecology & Biodiversity

KPI: **% farms under regenerative practices + Hectares under agroforestry**

Method:

Field agent checks practice during annual visit (rotation, cover crops, agroforestry). GPS photo validation. Proxy: area × GBIF biodiversity coefficient.

Example: eco.business Fund

50% of financed areas under regenerative practices — BlueMark 'advanced' verification (highest level)

Funders: EFRAG (ESRS E4), GCF, IFAD Biodiversity Strategy

Cost: Field agent: 15 min/visit. Zero additional cost if integrated into annual form

Water Efficiency (Climate-Smart Agriculture)

KPI: **Water use/ha (m^3/ha) −30% vs baseline • Hectares under efficient irrigation**

Method:

Volumetric meter reading (drip irrigation) or estimate: flow rate × duration × sessions. Baseline: initial survey or national irrigation agency data.

Example: Crédit Agricole du Maroc

−40% water consumption/ha on drip irrigation portfolio — eligibility condition for EIB/EBRD green line (+25% GCF access)

Funders: EIB, EBRD, GCF Adaptation, World Bank IBRD Green

Cost: Meter reading (1 min) or FAO AQUASTAT model if no meter. Integrable into existing annual monitoring visit.

Carbon Mitigation (Renewable Energy & GHG)

KPI: **tCO_2e avoided/year (IPCC/CDM parametric approach)**

Method:

No. of financed units × standard emission factor (IPCC AR6, CDM AM0046 for solar). No field measurement. Example: 1 × 5kW solar pump = 7.2 tCO_2e/year (SONELEC Tunisia grid: 0.596 kg/kWh).

Example: FIRA Mexico — Green Bond

6,309 tCO_2e avoided in 2023 / 18,928 tCO_2e cumulative over 3 years — reported annually in audited Green Bond report

Funders: ICMA Green Bond Principles, KfW/AFD Green Bonds, GCF Mitigation

Cost: Automated Excel calculation from disbursement data. Marginal cost ≈ 0. Annual emission factor revision.

Biodiversity & Nature-positive Practices

KPI: **Hectares of protected/restored habitat + % reduction in chemical inputs**

Method:

Proxy 1: Financed area under agroforestry (agent-certified) × GBIF habitat coefficient. Proxy 2: Chemical inputs purchased (supplier data) Year N-1 vs N.

Example: ILO-DINAMO / ODESYPANO (Tunisia — mountain value chains)

Biodiversity KPIs defined in Training Master Plan 2026–2031 — collected via ODESYPANO field agent form (ODK)

Funders: TNFD, CSRD ESRS E4, GEF Biodiversity

Cost: Agroforestry certificate proxy: zero additional cost. Input survey: 1 question added to annual form

Key message: 3 proportionate methods — direct field (annual visit) • parametric (Excel) • satellite (NDVI/CHIRPS proxy at zero cost)

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Best Practices: Manual and Semi-digital Approaches

What works in Agri-PDB operational settings

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1. Standardise before you digitalise

Define indicators and their formulas in the KPI dictionary BEFORE automating. A poorly designed digitised indicator remains poor.

Core principle

2. Structured mobile forms (ODK, KoboToolbox)

Offline forms, built-in validation, automatic sync. Cost: $0–500/year. Deployable in 2 weeks without IT expertise.

Operational tool

3. The intelligent sampling rule

No need to measure 100% of the portfolio. A well-designed sample of 10–15% of beneficiaries gives reliable outcome estimates.

Statistical method

4. Field–headquarters double validation

Supervisor validates 20% of submitted forms. Outliers checked by call or revisit. Monthly data quality score reported to management.

Quality process

5. Parametric models for outcomes

For large portfolios: apply calibrated coefficients (income, emissions, water) to existing production data. Validated by FIRA and DFI funders.

Proportionate approach

6. Integration into the credit process

Collect impact data AT THE SAME TIME as financial data: opening form, annual review, closure. Zero additional step for agents.

Operational efficiency

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Advanced Technologies: Practical Role and Limits

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When and how to mobilise advanced digital technologies

Integrated MIS/ERP platforms

YAPU, Mambu, Temenos: credit + impact integration in one system. KPIs calculated automatically from transaction data.

Use:

Banks with existing MIS

⚠ **Limit:** High implementation cost (6–18 months) and technical integration need

Field mobile applications

Agents collect GPS data, photos, structured responses offline. Automatic synchronisation on next network connection.

Use:

Field portfolio supervision and outcome collection

⚠ **Limit:** Depends on agent equipment and a training programme

Remote sensing & satellite imagery

FAO Earth Map, Google Earth Engine, Copernicus (ESA): NDVI, land cover, water stress. Proxy for ha under sustainable practices.

Use:

Environmental KPIs at scale without field survey

⚠ **Limit:** Limited temporal resolution, cloud cover, GIS expertise required

GIS & impact mapping

ArcGIS, QGIS: visualise portfolio geographic distribution, climate risk areas, beneficiary clusters by KPI.

Use:

Investor communication, risk mapping, GCF reporting

⚠ **Limit:** Georeferenced data required from loan origination

Satellite data & proxy models

CHIRPS precipitation, temperatures, estimated yields via NDVI × area. Enables proxy models without field surveys for large portfolios.

Use:

2nd tier banks, large smallholder portfolios (>10,000 clients)

⚠ **Limit:** Local calibration needed — coefficients must be field-validated

Golden rule: technologies amplify a good data system — they do not replace definition rigour

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Data Quality: Validation and Control

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A 4-step process for credible and verifiable impact data

1

Definition & Standards

Each KPI has a dictionary card: exact definition, formula, sources, frequency, owner, known limitations. No KPI without a card — this is the absolute rule.

2

Field Collection & Validation

Forms with built-in validation rules (ranges, consistency, mandatory). Supervisor validates 20% of submissions. All outliers are documented with explanation.

3

Headquarters Quality Control

Monthly review of consolidated data: completion rate, cross-portfolio outliers, temporal consistency. Data quality score reported in management dashboard.

4

External Audit & Assurance

Annual selective verification by independent auditor (10–20% of indicators). Methodology and assumptions review. Required for green bonds and GCF reporting.

4 golden rules of data quality:

- A KPI not defined in the dictionary is not reported
- Data gaps are documented and explained — never hidden
- Claimed precision in reports must match the method actually used
- Proxies are named and all underlying assumptions made explicit

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Level 1 — Manual: how to collect impact data

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Institutions starting out or areas without connectivity — what is possible, what is not yet

LEVEL 1 — MANUAL | Tools: Paper + Excel | Cost: Minimal | Auditability: Low

Economic KPIs (yield, turnover, income)

Practice:

Paper field form filled by agent during annual visit: area (ha), production (tonnes), average selling price, estimated turnover.

Example: ODESYPANO Tunisia (mountain value chains, DINAMO/IFAD project)

✓ Advantages

- Zero technology cost — applicable anywhere
- First-hand data, agent-farmer trust relationship

⚠ Limits

- Entry error rate ~15–20% — outliers undetected
- Consolidation takes 3–4 weeks post-field
- No intra-annual monitoring (season, post-harvest)

✕ Not auditable — insufficient for green bond

Gender KPIs (2X Challenge, SDG 5)

Practice:

'Gender' field on loan application form. Manual monthly register of women clients kept at branch counter.

Example: Small rural MFIs Sub-Saharan Africa (CGAP level 1 standard)

✓ Advantages

- Data available immediately — zero cost
- Simple to implement, no training required

⚠ Limits

- No fine disaggregation (no age, sector, first loan)
- Frequent errors/omissions — non-mandatory field
- Manual calculation burdensome above 200 clients/branch

⚠ Partial — % women calculable but not full 2X Challenge

Environmental KPIs (practices, ha, water)

Practice:

Field checklist: 'Drip irrigation Y/N', 'Agroecological practices Y/N'. Agent checks during annual loan follow-up visit.

Example: Regional agricultural credit cooperatives (Maghreb — small agricultural portfolios)

✓ Advantages

- Integrable in 5 min into existing visit
- No additional equipment required

⚠ Limits

- Unverifiable self-declaration — favourable reporting bias
- No actual area or water volume measurement
- No geographic traceability

✕ Not acceptable — pure declaration with no documentary evidence

Green & sustainability bonds

Practice:

At this level, green bond issuance is not possible. Goal: prepare migration to Level 2 to make data auditable.

Example: Preparatory step: Finalise KPI dictionary + test forms

✓ Advantages

- Essential starting point — definition precedes collection
- Near-zero preparation cost

⚠ Limits

- Impossible to prove KPIs to investors
- No fund-results traceability required by ICMA
- Minimum 18–24 months to reach auditable Level 2

→ Target N+18 months: prepare the framework for an SPO

Level 2 — Semi-digital: structured data, traceable KPIs

Most Agri-PDBs — the minimum threshold to mobilise concessional finance

LEVEL 2 — SEMI-DIGITAL | Tools: ODK / KoboToolbox + Advanced Excel | Cost: $0–500/year | Auditability: Medium

Economic KPIs (yield, turnover, income)

Practice:

ODK/KoboToolbox form: area (ha), production (T), average selling price and estimated income. Mandatory fields + range validation. GPS plot photo.

Example: Crédit Agricole du Maroc (irrigation portfolio, 2022–2024)

✓ Advantages

- Data centralised in 48h — completion rate > 90%
- Automatic turnover/ha calculation and income trend
- GPS photo evidence for external verification

⚠ Limits

- Declarative data — no independent weighing
- Agent training required (half day)
- Resistance if visit perceived as tax audit

✓ Eligible EIB/EBRD concessional finance — paves the way for SPO

Gender KPIs (2X Challenge, SDG 5)

Practice:

ODK with mandatory fields: gender, age, status (first loan, woman-led enterprise, % women beneficiaries). Google Data Studio dashboard: automatic monthly monitoring.

Example: Aceli Africa — partner banks Kenya/Tanzania (Year 1, 2022)

✓ Advantages

- Automatic gender × age × sector disaggregation
- Real-time dashboard — visible to CEO and funders
- Compatible IRIS+ reporting (PI8330, PI9991)

⚠ Limits

- Cultural resistance in some contexts
- 'Woman business owner' field: self-declared, unverified
- Does not yet measure outcomes (real income, autonomy)

✓ Eligible Social Bonds (EIB) and 2X Challenge — level required for ADB/IFAD

Environmental KPIs (ha sustainable, water, inputs)

Practice:

KoboToolbox: ha under sustainable practices (checklist), ha efficient irrigation, georeferenced GPS photo, estimated water use (meter reading or declaration).

Example: IFAD-DINAMO / ODESYPANO Tunisia (Training Master Plan 2026–2031)

✓ Advantages

- GPS photo = recheckable documentary evidence
- Data exportable to Excel / Power BI / basic GIS
- Integrable into existing monitoring visit (15 min extra)

⚠ Limits

- No automation — each visit is manual
- Water measurement: estimate if no volumetric meter
- Variable resolution depending on agent rigour

✓ Eligible EIB/EBRD green lines — prepares impact report for GCF

Green & sustainability bonds

Practice:

Excel tracking dashboard: allocation by eligible category (internal taxonomy), annual KPIs calculated, disbursement log. Documented KPI dictionary.

Example: Pre-SPO framework for regional Agri-PDB (FIRA Mexico model — preparatory phase)

✓ Advantages

- Documented and testable process before issuance
- Low preparatory cost (internal + junior consultant)
- Strengthens reporting rigour immediately

⚠ Limits

- Not yet independently auditable
- Insufficient alone for international capital market green bond
- SPO requires minimum 12–18 months of historical data

⚠ Prepares SPO — eligible bilateral concessional finance, not yet capital markets

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Level 3 — Digital & Tech : automated reporting, external verification

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Mature institutions accessing green capital markets and international climate finance

LEVEL 3 — DIGITAL & TECH | Tools: Integrated MIS + Satellite + GIS | Cost: Medium–High | Auditability: High

Economic KPIs (yield, turnover, income)

Practice:

Integrated MIS/ERP: transaction data → automatic proxy turnover (loan amount × sector coefficient × calibrated average yield). YAPU impact module: CA/ha and income tracking.

Example: YAPU Solutions (Latin America — >50,000 farmers)

✓ Advantages

- Zero additional collection — calculated from transaction data
- Real-time reporting — visible to management, funders, auditors
- External verification possible (BlueMark, Sustainalytics)

⚠ Limits

- Quality depends on coefficients — mandatory local calibration
- Proxy ≠ direct measurement (possible selection bias)
- High implementation cost (6–18 months, IT expertise)

✓✓ Level required for Social/Green Bonds — verifiable by independent auditor

Gender KPIs (2X Challenge, SDG 5)

Practice:

Automated dashboard from MIS: full disaggregation gender × age × first loan × sector × amount. Automatic 2X Challenge score calculation. Compatible IRIS+ PI8330.

Example: CGAP Gender Dashboard (Temenos — Sub-Saharan African banks)

✓ Advantages

- Full 2X Challenge reporting automatically — zero consolidation work
- Complete traceability woman × file × transaction
- Compatible EIB Social Bonds and IFC Gender Bonds

⚠ Limits

- Requires quality of initial data (files well completed at origination)
- Change of status (woman business owner → not) difficult to detect
- Does not measure outcomes (real empowerment, income)

✓✓ IFC / EIB Social Bond standard — automated 2X Challenge reporting

Environmental KPIs (satellite, NDVI, CHIRPS)

Practice:

Satellite + GIS: NDVI (Google Earth Engine) × financed area = ha under sustainable practices. CHIRPS for water stress. Parametric model tCO_2e (CDM AM0046).

Example: eco business Fund (50% areas under regenerative practices, BlueMark 'advanced')

✓ Advantages

- Independent verification — zero declarative bias
- No additional field cost (once system is in place)
- Evidence defensible to investors and SPO auditors

⚠ Limits

- Temporal resolution: images every 5–10 days (clouds, season)
- GIS expertise required for result interpretation
- Local calibration needed (NDVI ≠ 'sustainable practice' universally)

✓✓ GCF, ICMA Green Bond standards — external verification possible (Sustainalytics, ISS)

Green & sustainability bonds (SLB)

Practice:

Automated KPI reporting: tCO_2e, m^3 water, ha sustainable, % gender → Green Bond/SLB annual report generated automatically. SPTs verified by external auditor for SLBs.

Example: FIRA Mexico — Green Bond 2020/2023 (6,309 tCO_2e • 64M m^3 • 9,702 MWh — audited report)

✓ Advantages

- SPO obtained (Sustainalytics) — access to international capital markets
- SLB coupon reduction if SPTs met (−75 bps FIRA)
- Financing leverage ×3 to ×5 vs concessional finance alone

⚠ Limits

- Annual audit cost: €50–120k/year + SPO fees
- Full process: 12–18 months for first bond
- Requires dedicated impact & sustainable finance team (2–3 FTE)

✓✓ Capital market access: Green Bond / Blue Bond / SLB / GCF Direct Access

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Synthesis Matrix: adapt data collection to your maturity level

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4 KPI types × 3 levels —financing accessibility and data quality

KPI / Domain	Level 1 —Manual	Level 2 —Semi-digital	Level 3 —Digital & Tech
📈 **Economic (yield, turnover, borrower income)**	🔴 Paper field form —Excel entry Error rate: 15–20% Delay: 3–4 weeks	🟢 ODK/KoboToolbox —auto-validation Completion rate: >90% Turnover/ha dashboard in 48h	🟢 Integrated MIS (YAPU) —auto proxy Real-time reporting Verifiable by BlueMark/Sustainalytics
♀ **Gender (2X Challenge, SDG 5, social bonds)**	🔴 Paper register %women No fine disaggregation Not 2X Challenge compatible	🟢 ODK mandatory gender/age fields Google Data Studio dashboard Compatible IRIS+ PI8330, IFAD	🟢 Automated MIS dashboard Full 2X Challenge automatic EIB/IFC Social Bonds directly
🌱 **Environmental (ha sustainable, water, tCO_2e)**	🔴 Y/N declarative checklist No measurement or traceability Not acceptable to green funders	🟢 GPS photo + ODK (ha, practices) Recheckable documentary evidence Eligible EIB/EBRD green lines	🟢 Satellite (NDVI, CHIRPS, Sentinel-2) Zero declarative bias GCF + ICMA Green Bond standards
⚯ **Green & sustainability bonds (Green, Blue, SLB)**	🔴 ✕ Impossible No fund-results traceability Goal: prepare KPI dictionary	🟠 ⚠ Preparatory Shadow framework + allocation log Eligible bilateral concessional finance	🟢 ✓✓ Full access SPO + audited impact report Green Bond / SLB / GCF Direct Access

● Auditable / Eligible funding ● Preparatory ● Not acceptable → Migration from Level 1 to 2 unlocks the majority of concessional financing

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Digitalisation Roadmap : your action plan

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A realistic 3-phase progression aligned with your human, technical and financial capacity

Months 1-4

Phase 1 : Standardise and structure

1. Finalise the KPI dictionary : exact definitions, formulas, sources, owners, frequencies
2. Standardise collection forms (structured paper or Excel with validation)
3. Train loan officers on impact data collection (half day is sufficient)
4. Establish the field-headquarters double validation process (supervisor, 20%)

Deliverable: KPI Dictionary v1 + standardised collection protocol

Months 5-9

Phase 2 : Semi-digitalise and pilot

1. Deploy KoboToolbox/ODK mobile forms on 1-2 pilot portfolios
2. Setup a monitoring dashboard (advanced Excel or Google Data Studio)
3. Test sampling and validate parametric coefficients in the field
4. Document identified gaps and adjust the collection protocol

Deliverable: Pilot KPI dashboard + monthly quality report

Months 10-18

Phase 3 : Integrate and automate

1. Integrate KPIs into existing MIS/ERP via a dedicated module (no full rebuild)
2. Explore satellite data and proxies for priority environmental KPIs
3. Produce the first external impact report with independent verification
4. Align reporting with green bond, GCF and IFI requirements

Deliverable: Verified impact report + sustainable data infrastructure

Conclusion: 5 Key Messages

What to remember and how to take action

1

Standardise first, technologise second

A KPI's value comes from its definition, not its collection tool. Define first — automate later.

2

Leverage existing data before creating new data

Your credit systems already contain valuable proxies for economic and social outcomes.

3

Intelligent sampling is enough to measure outcomes

Measuring 100% of the portfolio is neither necessary nor realistic. A well-designed sample (10–15%) gives reliable estimates.

4

Data quality is managed — not just collected

A monthly quality score + double field validation + simple rules are worth more than abundant but unreliable data.

5

Digitalisation is a journey, not a leap

Every institution starts where it is. A 3-phase roadmap is more effective than a large transformation project.

Next: Webinar 4 — Communicating Impact: reports, external verification and finance mobilisation

Agri-PDB Platform | IFAD Investing in rural people | AFD Agence Française de Développement | Finance in Common

Thank you!

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