

Using the PIM Conceptual Framework to Train Protection Staff on Information Management

Data Policy Officer in UNHCR's Global Data Service, Rachelle Cloutier explains how she used the PIM Conceptual Framework to train Protection staff on Information Management.

Rachelle Cloutier is a Data Policy Officer in UNHCR's Global Data Service. Prior to her current role, she was Information Management Officer (Protection) in UNHCR HQ's Field Information and Coordination Support Section (FICSS), a role in which she provided technical field support and training on information management.

Information Management for Protection

In her capacity building role, Rachelle became involved in a UNHCR learning programme (LP) that aimed to strengthen the capacity of multi-functional teams in operations to collectively programme for protection. This learning programme is unique in that the operation as a whole applies, rather than individuals. The main objective is to strengthen the capacity of all colleagues in the operation to programme for protection, whether that be protection programming specifically or other programming with protection outcomes. Every year, the LP would be launched in each selected operation with a four-day in-country workshop.

As the LP evolved over the years, it became apparent that content on information management needed to figure more prominently in the curriculum, and that IM colleagues needed to be invited to participate given their role in supporting the solutions to the challenges that were being raised. Rachelle explains:



Image from a PIM training. This is not the training described in this case example.

During the in-country workshops, many of the challenges operations were raising were related, to various degrees, to a lack of capacity for or awareness of information management. So the colleagues responsible for the LP requested that the IM components be strengthened.

The solution [to meet this request] was PIM, because PIM is high-level enough and non-technical enough that it is good for any audience. It does not require any specialist or technical knowledge.

The contents of the PIM Framework spoke to Protection and Programme staff, and directly connected to what they care about [and] what they do in their everyday work. PIM addressed concerns that IM is too abstract or technical, and therefore a bit scary. It is general enough so people can see how it matters to their work for protection and how they can work with the IM experts in their offices to start generating or accessing the evidence they need to do their protection work. That really came to the fore in the context of this specific learning programme.

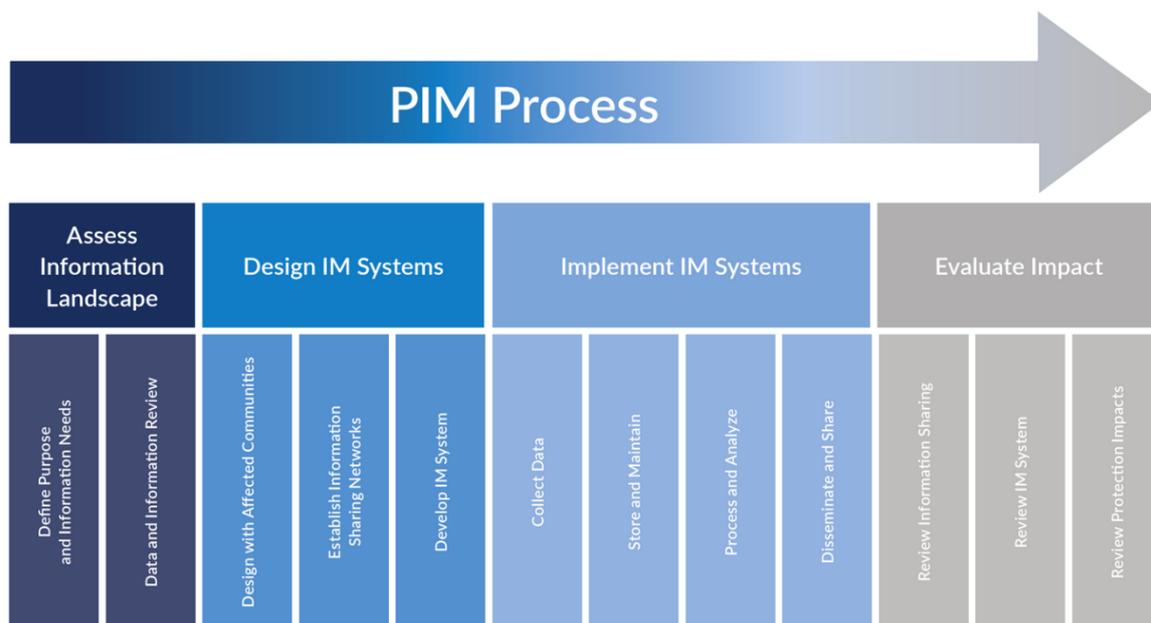
In my work as IMO (Protection), I found that PIM was always a useful way to introduce IM to Protection staff. So, I brought PIM into this learning programme for Protection and other functions.

Rachelle designed two sessions for the learning programme: the first an “Introduction to Information Management”, which was largely structured around the PIM Conceptual Framework (PIM Matrix, Process and Principles), and the second on data analysis. For Rachelle, As Rachelle put it, the PIM Framework provided the content and language she needed to introduce IM to Protection staff in an accessible and relevant way.

Use of the PIM Process

Rachelle describes some of the ways the PIM Conceptual Framework was helpful in this learning programme:

The PIM Process was helpful in the “Data Analysis” session because it allows participants to see the data analysis step within the ‘big picture’, within the broader information management process. It also helps people start thinking about the challenges they face and how following the PIM Process can help them with that. It often becomes obvious that challenges with data analysis are much more related to planning and process than to a lack of tools.



Rachelle used the PIM Process to show how a system can be built in a “systematic, collaborative and principled” way:

When people think about needing information, the default is often to start with data collection and to start drafting a questionnaire. [Then], half of the data gathered may never get used, and the ratio between the time invested and the utility of the information outputs is completely out of whack.

The PIM Process allows you to ask: ‘Okay, where do I start to get this right? No, I don’t start at step number seven with designing my data collection form. I start with step number one: with assessing the information landscape, understanding my strategic environment, getting a multifunctional team together to discuss information needs and information purposes, doing the secondary data review, engaging with communities, thinking about data sharing before I collect a single point of data, etc.’ The PIM Process also allows you to design and implement the system with clarity about who does what, when [and] how, for each step of the process. And then, of course, not forgetting the evaluation step, where you take a step back and think about how well the system worked and put those lessons back into the review process’.

In the IM community, we have the concept of the data lifecycle. But the data lifecycle needs to exist in a wider process where people make strategic decisions about what needs to be done in the first place. This is where the PIM Process comes in. It allows you to have that conversation about the purpose, the information needs, the utility, etc. It allows you to answer the question, ‘What evidence do we need in order to do what we need to do?’. This is the systematic aspect of PIM.

The great thing is that the data lifecycle is somewhat embedded inside the PIM Process, at the “Implement” Step. It is not all there, but the most important parts are. For example, even thinking about storage: You collect data, where does it go? Where does it need to go to be in a centralised location, where it is safe and protected, and can be accessed for use and reuse for different purposes? The PIM Process is misleadingly simple but it puts on paper all the steps that are necessary to properly design systems, and to do so in a principled way.

Use of the PIM Matrix

Rachelle also integrated the PIM Matrix into the Learning Programme:

I used the PIM Matrix so all colleagues, regardless of function, could start having the same vocabulary for the different [information] systems and activities that the operation was doing.

The PIM Matrix also illustrated that protection information needs are met by different systems, each with their own methods and data sources.

Use of the PIM Principles

I used the PIM Principles to anchor the content on IM in principled and responsible approaches that could guide what we do, how we do it, and who we do it with, at each step.

During trainings, I usually take one step of the PIM Process to ask participants how they implement the principles in practice. For example, data collection is a good one [to use] because people often feel familiar with it. I also like using a principle like ‘Do No Harm’ or ‘Coordination and Collaboration’, or whichever principle speaks most to the challenges reported by the operation. I ask, ‘What would it look like in practice to do data collection with a ‘do no harm’ approach or in a ‘people-centred and inclusive’ way, in a ‘collaborative and

coordinated way'? I usually get people to talk in pairs and feedback to the group, so it is a moment of reflection and exchange. This exercise usually brings forth the gap between what people are doing and what they could be doing in a more principled way.

The PIM Principles are a great way to catalyse a discussion about how people are working with data and how they can do that in a more principled way.

Relevance of PIM Framework for all sectors

Participants in the learning programme were members of a multi-functional team, drawn from a number of sectoral roles. Rachelle reflects that:

This [experience] was a nice confirmation that PIM is not only for Protection and IM, but that it also speaks to all sectors. A key message for me is the utility of PIM to bring data to non-technical people across all sectors and across the humanitarian community. It is presented at the right level, at a high enough level, and it speaks to the essence of our work with data in humanitarian contexts.

In short, the PIM conceptual framework helped me to make data 'speak' to the daily work of all staff and to the organisation's mandate. It provided an excellent way to engage with colleagues on IM and to bridge the gap between our respective functions.

PIM Highlights

- A corporate learning programme includes an "Introduction to Information Management" session that incorporates the PIM Conceptual Framework ([PIM Principles](#), [PIM Matrix](#), [PIM Process](#))
- PIM is used to strengthen the IM competencies of field-level multi-functional teams ([PIM Core Competencies](#))