

Global Shelter Cluster Information Management Review

March 2022

Contents

Table of Acronyms	2
Introduction.....	3
Methodology.....	3
1. Methodology Overview.....	3
2. Objectives.....	3
3. Implementation.....	3
Data collection.....	3
Data analysis and reporting	4
Findings.....	5
Theme 1: Setting the scene (the IM function & how it links to cluster strategies)	5
1. Challenges with the IM function	5
2. Suggestions on how the GSC can better support with IM capacity	9
Theme 2: IM processes & work streams (Data collection & analysis).....	10
1. Initial situation analysis and reporting	10
2. Needs assessment & analysis	11
3. Humanitarian Needs Overview (HNO), Joint Inter-Sector Analysis Framework (JIAF).....	13
4. Activity reporting, response monitoring & gap analysis	14
Theme 3: Tools & standards	15
1. IMAS toolkit	15
2. GSC website	16
3. Knowledge management	16
Looking forward (the IM cluster function in 5 to 10 years).....	17
Conclusion: Short-term and long-term recommendations for GSC	19
What happens next	22

Table of Acronyms

COP	Community of Practice
DEEP	Data Entry and Exploration Platform
FGD	Focus Group Discussion
GBV	Gender Based Violence
GSC	Global Shelter Cluster
HNO	Humanitarian Needs Overview
HPC	Humanitarian Program Cycle
HRP	Humanitarian Response Plan
IFRC	International Federation of the Red Cross
IM	Information Management
IMAS	Information Management and Assessments
IMO	Information Management Officer
JIAF	Joint Inter Agency Framework
MSNA	Multi-Sector Needs Assessment
NFI	Non-Food Items
NGO	Non-Governmental Organization
PDM	Post-Distribution Monitoring
PiN	People in Need
SAG	Strategic Advisory Group
SDR	Secondary Data Review
SSC	Shelter Severity Classification
ToR	Terms of Reference
UN	United Nations
UNHCR	United Nations High Commissioner for Refugees

Introduction

As part of the development of the next Global Shelter Cluster (GSC) strategy, the GSC launched in October 2021 a review of Information Management (IM) processes and activities of the Shelter cluster to inform IM strategic priorities for the strategy. The review also provided an opportunity to identify IM issues for which solutions could be conceived in the short-term throughout 2022. As such, this report provides recommendations formulated for both the short, and long-term.

Findings outlined in this report are based on a series of conversations held between October 2021 and March 2022, with IM specialists and Shelter cluster internal and external stakeholders, with a variety of backgrounds and profiles. Their insight was invaluable in feeding into IM recommendations for the GSC.

In terms of scope, the IM review covered the IM function in general, the different IM activities that are implemented throughout a Shelter cluster lifecycle, both within or outside of the Humanitarian Program Cycle (HPC), and the tools and standards in place to support their delivery.

Methodology

1. Methodology Overview

The IM review lasted several months, comprised different rounds of consultations, and applied qualitative data collection and analysis methods. Data was collected through a series of either group or bilateral interviews¹, using semi-structured data collection tools. Findings were then analysed using qualitative methods and summarized in this report, which was updated throughout the implementation of the review.

2. Objectives

The objective of the IM review was to provide recommendations to inform IM strategic priorities and work streams for the new GSC strategy and to address IM issues in the short term. To do so, the IM review focused on identifying the challenges, good practices, and opportunities, and in turn, recommendations on how the GSC can better support, as well as long-term visions for the IM function.

Topics covered during the different discussions were aligned to those from the IMAS toolkit (itself aligned to the Cluster lifecycle): initial situation analysis & reporting, needs assessments, HNO / JIAF / HRP, activity reporting, response monitoring & gap analysis, IM strategies, IMO role responsibilities & IM capacity building, the GSC website, IMAS toolkit, as well as long-term visions for the IM function. While the first phase of the review focused primarily on gathering practical feedback, the second phase intended to get a broader understanding of the landscape in which the IM Shelter Cluster function operates.

3. Implementation

Data collection

Several rounds of consultations were held with a variety of IM stakeholders and specialists over the course of the IM review.

- *IM session at the GSC Coordination Workshop, November 17*

¹ Further information on each of these rounds is provided under the implementation (data collection) section of the methodology.

The first step of the review was to gather feedback from participants during the IM session at the GSC Coordination Workshop on key IM topics (IM strategies, needs assessments, JIAF/HNO, the IMAS toolkit and the GSC website) and their thoughts on general IM challenges, opportunities, and how the GSC can better support. Feedback from 62 participants (including members of the GSC) was collected through live polling, discussions, and the Easy Retro² platform.

- *FGDs with IMOs and Cluster Coordinators, November 18-19*

To go more in depth into the IM function's core activities, four remote FGDs were held. Participants included 9 field IMOs and 7 Cluster Coordinators (from both disaster and conflict settings), the GSC IM team, and 4 IMPACT facilitators (2 per group), with a total of 6 to 8 members in each group. Discussions focused on the challenges, good practices, how the GSC could better support, cross-cutting priority topics of concern (data protection, GBV), and long-term visions for the IM function.

- *Bilateral interviews with GSC support team members, November 22-29*

To gather information on the global perspective of IM challenges, REACH held five bilateral interviews with IM or coordination focal points of the GSC support team. Discussions focused on perceived challenges of field level clusters, how the GSC can better support the delivery of the IM function at field and global level, and long-term ideas or visions for the IM function of the Shelter Cluster.

- *Presentation to the GSC Strategic Advisory Group (SAG), February 03*

Preliminary findings based on these initial rounds of consultations were presented to the GSC SAG in February, for feedback and ideas in terms of recommendations and priorities for IM in the Shelter Cluster.

- *Bilateral interviews with IM stakeholders and specialists outside of the Shelter Cluster, and other GSC functions, February-March 2022*

Finally, over the course of February and early March 2022, REACH held 12 bilateral discussions with stakeholders and IM specialists outside of the Shelter Cluster, including IMOs from other global clusters, IM specialists from different UN agencies, and focal points from organizations specialized in IM. Discussions covered challenges with the IM function, challenges with IM activities, good practices, practical opportunities and recommendations, and long-term vision and recommendations for the IM function.

REACH also discussed with three other members of the GSC support team whose function strongly connects to IM work streams (advocacy, research, greening the environment) to include their perspective.

- *Desk review of other global cluster IM tools*

To complement the discussions with IMOs from other global clusters, a rapid desk review was conducted to identify the tools and resources available to support field IMOs in their function. Good practices examples are included through the narrative of this report.

Data analysis and reporting

Findings included in this report are based on the different rounds of consultations. They should therefore be considered as indicative only of the perceptions and experiences of IM stakeholders and specialists who took part in the consultations. To ensure anonymity, no discussion was recorded (apart from the IM Session of the Coordination Workshop, which was recorded for note-taking purposes only and not shared beyond those part of the coordination teams) and findings are not attributed to any specific individual.

² Easy Retro is an online teamwork tool that allows live polling and other tele-collaboration prompts, and can be found at <https://www.easyretro.io>

Data analysis consisted of identifying recurring statements to extract trends or particularly salient statements to inform recommendations. For structure and to provide narrative, findings are organized under three broad themes. The first theme addresses the IM function, its connection to the cluster strategy, and the IMO profile and skills required to deliver it. The second theme looks into the different day-to-day activities of the IMO relating to data collection and processing throughout the cluster annual cycle. Finally, the third theme covers the global resources in place to support IMOs in delivering their function.

The methodology employed for this IM review presents a few limitations as findings are based on the experiences and views of IM stakeholders or specialists. In addition to this resulting into indicative findings, it is important to note that there may be bias in certain statements and personal preference regarding processes and IM priorities, particularly those that were mentioned by one or a few individuals only. To mitigate bias, recommendations are, as much as possible, based on the most frequently reported challenges or opportunities. In addition, due to conflicting priorities, not all stakeholders initially targeted were available for consultations, hence their perspectives are not factored into the findings. Finally, although questions were formulated prior to each discussion to guide the conversations, they were open-ended enough that specific topics may have been inconsistently covered or derailed from one discussion to another.

Findings

Findings outlined below are organized under the three broad themes outlined above. Discussions held a pragmatic tone (particularly earlier ones with shelter cluster IMOs and coordinators), which allowed to gather practical ideas to address tangible IM challenges. Meanwhile, other conversations, particularly during later stages of the consultations, were instead focused on big picture trends and ideas. The first theme of this chapter heavily draws from the latter, while the second and third are mostly based on the former.

Theme 1: Setting the scene (the IM function & how it links to cluster strategies)

This section investigates IM as a function and the landscape in which it operates, challenges with understanding its purpose, challenges with IM capacity and how IM fits within cluster strategies.

1. Challenges with the IM function

The second phase of the IM review was aimed at getting a broader understanding of the landscape in which the IM function operates, through discussions with experts whose extensive IM experience has allowed them to develop a critical and wholesome perspective. The points they shared and which are retraced under this section are therefore not specific to the shelter sector.

In a nutshell, challenges with the IM function are summarized under three inter-related points. The first covers lack of clarity around the IM function itself, which leads to inefficiency, but also to a lack of talent retention. The second discusses the complications that have arisen with an evolving IM landscape, with strong emphasis on becoming too “techy” and advanced in terms of data and analysis, at the expense of qualitative information and value given to soft competencies of IMOs. The third is related to capacity both at the onset of a crisis, but then mostly in terms of ensuring continuity over time.

- ***Understanding the IM function...***

Lack of clarity around the IM function was reported by the vast majority of respondents during the second phase of the IM review. They described how an IMO is perceived differently depending on the context, taking on the role of data clerk, administrative assistant, graphic designer, coordinator, data scientist, topic analyst, communication/advocacy focal point, researcher, or “techy genius” with all the answers and band aids at hand. In the case of clusters, this lack of understanding of the IM role appears to be further compounded by a general misunderstanding of how it fits into the cluster coordination function.³

Confusion around the IM function has consequences on the expectations on what a cluster IMO can and should be doing, which can cause inefficiency and affects the type of profiles that is recruited. Lack of clarity also leads to frustrations among IMOs who feel either under-valued or overloaded with requests that they do not have the expertise to perform adequately (for example communication). One respondent gave the example of the discrepancy with recruiting IMOs with data scientist backgrounds but who are then tasked with maintaining contact lists, making simple excel tables, and attending coordination meetings. This example raises the question of whether the issue is with the profiles that are recruited or the inability to make use of the potential such profiles have to offer.

Several respondents indicated that such frustrations cause lack of retention, while also underlining the challenges IMOs face with career development, being unable to move away from being boxed as an IMO, with little clarity on what that actually entails. One respondent also linked confusion around the IM function to the inability to measure IM success, with a tendency to consider certain profiles as “IM experts” without any solid evidence of what that actually means.

For several respondents, the origin of the challenge with defining the IM function is structural, stemming from lack of understanding from upper management or cluster lead agencies on what an IMO, both in cluster and non-cluster settings, can and should be doing, and IM frequently being perceived as an “add-on” rather than a “parcel of business processes”. However, respondents also acknowledged the difficulty with framing a role that is so central to operations that are carried out in complex and unpredictable environments, which makes it difficult to know what is actually needed at the response-level, let alone from a global perspective.

- ***...in an evolving landscape...***

Most respondents from the second phase of the consultations recognized that the IM function has significantly evolved over time (adding to, or maybe because of, the confusion cited above), in terms of scope, standards, and tools used to deliver it. Common trends in terms of unintended consequences included pressure on standards, continuity, unhealthy competition, and processes for IM work streams that have become increasingly heavy (for example PiN calculations).

A couple of respondents pointed out that, although the increasing importance of evidence-based decision-making has resulted into high standards in terms of visibility, methodologies, and outputs (which, in itself, is a positive outcome), these standards are not always aligned with the realities on the ground in terms of the ability to deliver. For others, the over-emphasis on advanced analysis or being “techy” has been pursued at the expense of basic and soft skills, particularly in emergency contexts, some stating that technology has

³ This point is further explained under IM strategies.

become a “burden” on the IM function. Rather, “the best IMO is the one with good common sense, able to use Excel, and who understands what’s going on in the field,” or someone “who knows how to work well with others.” The other challenge with advanced analysis and tools is related to continuity. The more complex the tools and methods are, the more difficult it becomes to ensure that they can be handed over locally.

Another trend reported by respondents was the increasing number of actors working with data in the humanitarian sector, leading to “unhealthy competition” and further pressure on standards. Although one respondent commented that competition was good to ensure quality, others expressed frustration with duplication, lack of collaboration, and poor sharing between agencies and IM-specialized actors, as well as blurry mandates when it comes to informing a response.

Several respondents also referred to heavier processes; while detailed processes are needed to safeguard standards (including ethical ones), they have reportedly also become a burden on IMOs. Some examples included inter-agency processes, standard operating procedures, or data protection protocols. Inter-agency processes were referred to as particularly challenging also due to the perception by cluster IMOs that they must navigate between both cluster and inter-agency priorities. Although questioning processes can be good, one respondent referred to the difficulties that arise when, in emergency settings, established processes are constantly challenged by well-intentioned IMOs, causing tensions in an already stressful environment.

Finally, as the IM sector evolved and became more digital, there are data risks today that did not exist before. All respondents agreed that data protection is crucial but that the challenge, as put by one of the respondents, comes with balancing between having data that is useable and data that is protected enough to not do any harm. At the same time, recent cyber-attacks on humanitarian agencies have also shown the interest in information stored by humanitarian actors, and vulnerabilities in protecting information of affected population.⁴ In addition, several respondents referred to the lack of clarity on how data ends up used, let alone by affected populations whose data is being collected to inform humanitarian responses, which is problematic in terms of humanitarians’ commitment to being held accountable.⁵

- ***...leading to difficulties with finding and sustaining capacity...***

Challenges with IM capacity (due to lack of human or financial resources) were raised during the vast majority of the discussions, specifically in relation to finding capacity, ensuring continuity, and the inconsistency between different responses, in terms of presence and competencies.

One common trend among participants’ feedback was the inconsistency between different operations, and particularly between sudden onset and protracted settings. Unsurprisingly, however, the commonly observed trend was that the level of capacity usually depends on the level of attention given to a particular crisis (media, donors).

At the onset of a crisis, the main priority in terms of IM is to have sufficient and strong IM staff on the ground as soon as possible, which often proves to be an overall challenge. It should, however, be noted that several respondents outside of the cluster perceived the Shelter Cluster as having a particularly solid system in place in terms of being able to deploy IM staff quickly and with good profiles.

In the medium term, challenges appear to shift towards the ability to ensure continuity. A few respondents with extensive sudden-onset experience spoke about the problems with having highly experienced IMOs

⁴ Reliefweb, [Cyberattacks: a real threat to NGOs and nonprofits](#), 22 February 2022.

⁵ One respondent made the point that although surveys generally ask for “consent” to collect information, the formality does not mean there is clear understanding on the respondent’s part on how the information will be used.

deployed to missions where they only stay for a very short amount of time, usually unable to dedicate time to building IM capacity locally and do proper handovers, resulting in lack of continuity and difficulties with reinforcing IM preparedness in the event of next disasters.

Concern was also raised regarding the competencies among IMOs. Although most IMOs were reported to generally have extensive technical knowledge, gaps were identified in terms of coordination skills and understanding of the “bigger picture” of the IM function (both in sudden-onset setting and HPC ones, especially for junior IM or national staff). Participants from outside the Shelter Cluster in particular referred to lack of capacity of IMOs to engage in inter-agency processes, resulting in problems with delivery and difficulty with aligning with well-established inter-agency processes (for example the use of Common Operational Datasets). In the case of UNHCR-led clusters, an added challenge was that the IMOs dedicated to the shelter clusters are often required to support the Protection Cluster as well as UNHCR operations.

Compounding lack of resources and capacity, is the frequency of turnover and difficulty in retaining strong IMO profiles, which leads to problems with continuity within and across shelter clusters, as well as within the broader inter-agency IM setups.

- ***...and challenges with embedding the IM function into cluster strategies.***

During the IM session at the Coordination Workshop, 15/24 participants indicated that their cluster did not have an IM strategy, although 25/26 reported that they had a general cluster strategy.⁶ Discussion findings indicated that, although it is not necessary to have a stand-alone IM Strategy, it is good practice to be explicit about how the IM function supports, and is embedded in, the cluster strategy. The relevance of having a standalone IM strategy was also raised during the SAG discussion, instead resulting into the suggestion that the priority should be to ensure that there is clarity on how IM work streams and processes are embedded in the cluster strategy. For example, a lack of a clear and formalized understanding of how IM fits into the cluster strategy can lead to the collection of data that may not be useful or used, while increasing workloads and reducing efficiency because of a lack of clarity of what is “a priority” and what is not. In addition, a solid IM strategy not only provides a backbone to the IM function but also facilitates handovers.

Cluster strategies tend to focus on listing IM tools and activities, and less on how the IM function fits into the broader picture, which also leads to lack of accountability in IM processes and difficulties in coordination between the IMO and the Cluster Coordinator. As such, as described by one respondent, IM is perceived as an “add-on” and not a parcel of cluster “business processes.” As a result, lack of anticipation in how the IM function will roll-out can lead to improvisation or too much time spent on specific activities at the expense of others.

Thinking strategically about IM within a cluster therefore includes being clear about how needs are quantified, targets for shelter interventions, geographic areas of priority, plans on how to monitor the response, clarity on how often partners have to provide updates, and timelines for HPC milestones for which the IMO has a leading role. Finally, as recommended by one external stakeholder, a solid IM strategy should also include a strategy on recruitment and capacity to address the challenges outlined above.

⁶ This information was collected through live polling during the IM session, and should therefore be considered as indicative only. Several members from the same cluster may have provided a response.

Summary: Three main challenges with the IM function

- ✓ *Lack of clarity around the IM function itself, leading to inefficiency and lack of talent retention*
- ✓ *Complications that have arisen with an evolving landscape*
- ✓ *Challenges with capacity, both at the onset of a crisis and in ensuring continuity over time*

2. Suggestions on how the GSC can better support with IM capacity

To address capacity gaps and provide a framework to the IM function within the Shelter Cluster, several field and global level respondents recommended that the GSC explore the possibility of developing a comprehensive IM-specific training that would cover not only technical IM skills, but coordination and soft skills as well. Through the development of the training, a reflection on the ideal IMO competencies would have to be conducted. The output from this reflection would be a solid competency framework (see as an example the Nutrition Cluster's framework) for the IMO in the Shelter Cluster to ensure that the IM function is fit for purpose. In turn, the standard IMO ToR would be revised to reflect newly identified best practices.

Furthermore, conscious of the confusion around the IM function, and to ensure better understanding across the board, several respondents strongly recommended that coordinators or upper management stakeholders from cluster agencies be part of the trainings (or receive some version of it). This would allow coordinators and management to have a better understanding of what the IMO can and should be doing.

During the discussion among SAG members, the point was made that the priority for the GSC support team should be to make field level IMO's job as "easy as possible" by providing the tools, guidance and resources to enable the delivery of their function. Participants to the discussions across the board mentioned revamping the IMAS toolkit to make it more ready-to-use, and reinforcing surge support from the IM global team, including through reaching out proactively to field IMOs and building personal relations. However, one participant underlined the importance of ensuring that surge support not be understood as replacing lack of dedicated resources. To address capacity gaps, several respondents also raised the idea of reinforcing standby partnerships with external specialized IM organizations, and possibly including them in any envisaged Shelter Cluster IM training.

Participants also pointed out that the aggregated knowledge from IMOs across the world is wide and that this should be leveraged by providing a space for them to exchange this knowledge. The reinforcement of the existing IM Community of Practice was identified as the ideal way to do so. In summary, in the long-term, both top-down and horizontal capacity building would reinforce the ideal IMO profile and help build a pool of strong and retained professionals.

Finally, to support clusters in developing a strategy for the IM function at field level, the GSC should provide guidance and standards on the questions that need to be asked. To do this, the IM Strategy guidance note, presently part of the IMAS toolkit, can be reinforced to be less process-driven and more focused on concepts, i.e. what an IMO should think about when drafting the IM strategy. Conversely, processes that can be reinforced should be identified, to have a more "business-like" approach to increase accountability.

Summary: Suggestions on how the GSC can better support

- ✓ *Developing IM-specific trainings adapted respectively to both IM staff and IM stakeholders (management, cluster coordinators) to raise awareness of the IM function*
- ✓ *Make the IMO's job "as easy as possible" by providing tools, guidance and resources, including on how to develop a country-level IM strategy*
- ✓ *Provide human resource capacity to support (surge, reinforcing standby partnerships)*
- ✓ *Reinforce existing channel of support (for example the IM Community of Practice)*

Theme 2: IM processes & work streams (Data collection & analysis)

This section provides key findings on common IM activities conducted within a cluster setting. They include both conceptual and practical challenges, good practices, and opportunities and recommendations.

1. Initial situation analysis and reporting

Initial situation analysis consists of assessing partner presence, tracking activities, determining access constraints, and understanding the context and immediate humanitarian conditions. Feedback from respondents was that tracking partners and activities tends to absorb most IM resources at the expense of thorough analysis of the context and understanding of humanitarian conditions.

As a result, activity reporting continues to be one of the main sources upon which decisions are made early on in a response, which is problematic because it does not indicate affected populations' needs and whether or not they are recovering. In fact, merely providing an overview of where the general direction of the response is going can create a false perception that humanitarian needs are primarily prevalent where the assistance is provided. One respondent pointed out that "a lot is made up" at later stages of the response because common indicators that can be used to measure the response were not identified earlier on in the response, making it difficult to track whether conditions and needs have evolved and how.

Ideally, IMOs, as reported by different respondents, should instead focus on processing and triangulating comprehensive data to guide the response, such as primary data from rapid needs assessments, or secondary data from government sources, development actors, or satellite imagery. Availability of primary data is, however, often an issue, with either insufficient or too much incomparable data because of poor assessment coordination between partners and agencies. IMOs are therefore put in a situation where they have pressure to process either too much or not enough (quality) data quickly, which, in both cases, can lead to poor analysis. Skills to actually conduct such assessments and analysis are also often missing.

In addition, several respondents pointed out that not enough value is given to data collected through qualitative methods, which particularly early in a response, can provide significant insight on how people are doing and the extent of their recovery. One respondent highlighted the added value of the Shelter Cluster (as opposed to other clusters) in accessing such data, thanks to its connection to National Societies, which are embedded in local communities, and therefore generally have better access to communities and deeper understanding of the local context. Meanwhile, several respondents pointed out that lack of engagement with data collected by development actors, useful for baseline data, can lead to major gaps in the information that is factored in when conducting an analysis of humanitarian conditions.

Good practices to address these challenges and mitigate their effects were underlined by several participants who retraced their own experiences. The first was to highlight the importance of strong collaboration between the IMO and the Cluster Coordinator to help the IMO adapt to rapidly evolving

contexts and the strategic direction of the cluster, and to prevent duplication of coordination efforts. To address difficulties related to initial situation analysis, some participants highlighted the value of having assessment specialists in addition to IMOs responding to the crisis and inputting multi-sector initiatives as much as possible to ensure shelter data needs are included.

Data sharing has become challenging, despite the technological sophistication in the way data is collected and processed. To encourage better and more timely information flows, participants highlighted the importance of establishing a 2-way stream between the cluster and partners, by demonstrating to partners how the information they provided is used by the Shelter Cluster to coordinate a response. Finally, for preparedness contexts, a few participants with experience in these types of setting highlighted the importance of pre-emptively training partners on both activity reporting and rapid assessments.

From the GSC side, in addition to providing surge support as needed, participants underlined that field level clusters would benefit from reinforced rapid assessment preparedness through the development of ready-to-use toolkits for rapid analysis of shelter data using different methods, and through building knowledge across the sector on rapid response mechanisms, the different types that exist, and the Shelter Cluster's IMO role in them.

2. Needs assessment & analysis

Similar to challenges raised above, participants mentioned the following challenges with data in relation to needs assessments: either not having enough (quality) data or having too much that is not processed in a way that is useful for decision-making. Reported reasons for this included the general “culture around data,” and cross-cutting challenges with analysis, as well as more practical challenges including time constraints, resources, available capacity, and good planning to conduct assessments.

A common trend through many discussions was that secondary data reviews (SDRs) are not conducted frequently enough. SDRs increase the quality of assessments, by improving the research design and by providing context to results. However, because assessments are usually done in a rush, little time is dedicated to conducting SDRs. Some participants reported finding the Data Entry and Exploration Platform (DEEP)⁷ very useful for facilitating SDRs and recommended all IMOs be trained on how to use it.⁸

On “culture around data,” participants raised several points. One participant summarized it as: “a challenge with being able to drown the noise,” specifying that “we'd rather collect more data than look at it” and use it in a strategic way. Another participant pointed out that assessments can be perceived as biased and conducted to justify a protracted response and humanitarian presence in particular areas.

Several challenges were raised relating to analysis by respondents. As a crisis becomes protracted, information needs tend to become more complex. However, because clusters are no longer faced with an acute emergency, there is no “excuse to not have solid analysis and high levels of information.” As above-mentioned, recent years have been marked by pressure to produce quality analysis. Several respondents pointed out that the type of descriptive analysis that is usually produced (even the most “advanced analysis”) should not actually be considered as sufficient evidence to inform a response as it does not allow to compare trends over time nor to truly understand correlations, let alone causes. For example, the shelter sector has yet to figure out how to measure the outcome and impacts of shelter needs and conditions (on the environment, on public health).

⁷ As described on the [platform's website](#), “The Data Entry and Exploration Platform (DEEP) offers a suite of tools and collaborative workflows that meet the needs for compiling, storing and structuring data and qualitative information.”

⁸ To note that the choice of platform also depends on personal preferences.

In addition, some participants referred to the disconnect between IMO and the shelter practitioners who interpret data (analysts) produced by IMOs to inform the response, and who usually have technical knowledge of the sector (which IMOs rarely do). Problems arise when the IMO and the analyst do not speak the same “language.” The consequence is that the disconnect can result in the analyst overriding the work done by the IMO. An example provided by one of the respondents related to the 5-point severity scales, where severity classifications developed by IMOs were dismissed by sector experts based on their own understanding of the situation, and disagreement with referring to some areas as having “minimal” or “catastrophic” severity.

Participants also raised facing challenges with data visualization and dissemination of analysis findings. Although the use of tools such as a PowerBi has increased the rapidity through which findings can be disseminated, infographics are not always sufficient and may lack context. Instead, one participant suggested that more effort could be put into creating “thoughtful, interesting” products that also highlight key messages through narrative, complementing infographics and other more visual ways of presenting findings.

As a result of the pressure to produce quality data, partners are sometimes hesitant to share data out of fear of being judged, as reported by several FGD participants. As mentioned earlier, competition for funding also reportedly leads to agencies collecting data in their silos without sharing. Finally, some participants admitted that, although multi-sector needs assessments (MSNAs) are necessary and represent a huge improvement to informing HNOs, increasing reliance on them has made sectoral clusters a bit “lazy” in their sector-specific needs assessments and analysis, and that more investment is therefore needed for shelter specific assessments.

Access issues were also frequently mentioned, inhibiting data collection altogether. Good practices raised by participants to address difficulties with access included using proxies and building capacity of local partners to improve the quality of coordinated assessments, and because, ultimately, partners tend to have better access in areas that are difficult to reach for security or administrative purposes. More importantly, partners represent a stable factor in a protracted response or recurring disaster settings.

Building partner capacity also included focusing on shelter concepts and the way in which questions are asked to improve the quality of shelter data. Two important recommendations surfaced from the interviews, with all interviewed participants agreeing that more effort should be made to implement them: 1) to systemically organise debrief sessions with affected populations and governments to improve accountability and 2) to ensure that, when looking at shelter, focus should not be only on the material aspect (the shelter, building, the Non-Food Items (NFI) kits) but should also be human-centred to better understand the needs and experiences of the affected community.

Ideas on how the GSC can better support here reflect thoughts shared on previous themes. The development of ready-to-use toolkits, including flexible, pre-defined methodologies for different types of contexts (including hard-to-reach contexts and MSNAs) would significantly reduce the time spent on methodology design and improve the quality of the analysis. In particular, recognising differences in access, capacity, and resources, these toolkits should cover the “good enough” and “nice to have,” for both protracted and disaster settings.

In addition to providing these standards, guidance in the toolkits would also clarify terminology related to shelter assessments. On MSNAs, the importance of designing and ensuring endorsement of an indicator and question bank ahead of the next HNO 2023 season was underlined. Down the line, assessment coordination should be part of any envisioned IM training. Respondents from the Shelter Cluster also commonly mentioned that additional surge support would be welcome, particularly related to support zooming in on specific components of an assessment to increase quality. Finally, to address data sharing issues, several participants expressed that they would be proponents of having data sharing protocols that

could be implemented within the sector among partners of the Shelter Cluster. These protocols would, on the one hand, reinforce data protection, and on the other, encourage partners to exchange information.

3. Humanitarian Needs Overview (HNO), Joint Inter-Sector Analysis Framework (JIAF)

Challenges related to the HNO were both conceptual (and similar to those outlined in the previous section relating to analysis) and practical. From a practical standing-point, timelines continued to be perceived as too short to deliver quality analysis (while the full HNO process reportedly often drags for months), often leading IMO's having to rush through calculating People in Need (PiN) figures and drafting narratives, without sufficient time to properly conduct an analysis beforehand.

On top of short timelines, several participants expressed feeling disenchanted with going through such a resource-intensive process when ultimately, such a small portion of shelter chapter HRP's end up getting funded. On the inter-sector side, there appeared to be a unanimous agreement that methodological standards looked good on paper but in practice were too high and sometimes unrealistic. To fulfill expectations, data would be needed at a much more granular level than what is usually possible to collect. In addition, one respondent pointed out that shelter needs are often not taken into account in inter-sector analyses, usually to avoid double-counting, which does not always make sense conceptually (for example: inadequate shelter does not always indicate food insecurity).

Another challenge raised was the lack of clear standards and common way of measuring the severity of shelter needs. HNO methodologies (including how PiN figures are calculated and how different areas are classified by level of severity) tend to often be improvised based on available data and subjective to individual views on what constitutes severity in shelter needs and are not consistent from one year to the other within a context, let alone across them. As a result, as is the case with other sectors as well, it is generally not possible to compare needs over time and between places, which makes it difficult to understand where needs are and how they are evolving. On a practical level, lack of common standards and methodologies leads to multiplication of efforts because methodologies have to often be redesigned at the start of each HNO season.

To illustrate the point on the extent to which HNO methodologies depend on what data is available, it is interesting to note that, during the IM session at the GSC Coordination Workshop, the second most frequently reported source of data⁹ for the HNO 2022, after MSNAs (12/20) was "Data collected by other sectors / agencies" (9/20) over which, presumably, the Shelter Cluster has little influence. The third was "Shelter Cluster partners' data" (7/20), which is not ideal to calculate a PiN. The least reported data source was "Data collected through Shelter needs assessments" (5/20) which is the channel through which shelter clusters could lead on the design and collection of the information they need to inform their decision-making.

To address these challenges, several good practices or opportunities were highlighted. Most resembled those already mentioned in the needs analysis section, particularly the importance of having a human-centred approach when analysing shelter needs for the HNO. Several participants insisted on the importance of involving shelter experts as well as the potential for qualitative analysis to further refine the understanding of shelter needs both in the absence of shelter quantitative data or to provide context to it. Here too, engagement with MSNA findings for sectoral analysis was underlined.

To better support HNO analyses, recommendations for the GSC were formulated both for the short and long term. In the short term, ahead of the 2023 HNO, several participants recommended to develop flexible guidance on how to calculate a Shelter PiN and to clarify standards (e.g., what is "good enough" and what

⁹ This information was collected through live polling during the IM session, and should therefore be considered as indicative only. In addition, participants could select several options. Discussions confirmed these overall live polling trends.

is “nice to have”) and terminology throughout the sector response. Depending on upcoming updates to the JIAF for the 2023 HNO, existing guidelines on how the shelter sector should engage with the inter-sector PiN might need to be updated as well. In addition, the GSC IM team should anticipate and provide structured support during the HNO season, by anticipating and proactively engaging with clusters. In the long-term, investment in the Shelter Severity Classification (SSC), which will provide a reference on how to measure the severity of shelter needs and in turn reinforce the shelter “voice” in inter-sector forums (beyond the HNO and not only in HPC contexts as well), should continue. Several participants, across the different consultations, mentioned interest in having a “shelter index” to help them with PiN calculations, which is one of the components of the envisioned broader SSC system.

4. Activity reporting, response monitoring & gap analysis

Activity reporting, response monitoring, and gap analysis are grouped together as similar best practices and challenges were raised for each. Conceptually, most discussions centred around the type of data that should be collected. A frequently raised challenge was the reliance on output indicators to monitor a response and measure its impact. One common trend among several participants, was their perception that relying on output indicators – for example data on the number of NFIs that have been distributed – is insufficient, both to understand the situation but also for advocacy purposes with donors. Although output indicators are necessary to track the response and funding attributions, participants overall agreed that qualitative response monitoring, using proxies and expert judgment, in addition to outcome indicators, would significantly improve the ability to understand whether populations are recovering, how they are doing so, and why (not).

Post-distribution monitoring (PDM) was mentioned as a good way to achieve these goals. One participant also referred to the case studies conducted under the GSC Shelter Projects Working Group, which, although being specific to the local context, present good examples of how to apply qualitative methodologies to impact monitoring. In addition, to improve the overall quality of activity reporting, good practices mentioned by participants included making sure that partners, especially local partners, are well trained on the tools that are used and the importance of these activities, preceded by IM capacity mapping of partners.

Generally, respondents reported that gap analysis could be improved, which is sometimes done poorly (leading to double-counting for example), or not done at all. IMO tend to spend a lot of time on activity reporting and processing, in part because units and targets are sometimes understood differently, there are often issues with accuracy, reliability (and sometimes veracity) of data, which leads to lots of checking and following up with partners, and because data is often not shared on time. In addition, one respondent also pointed out that the scale of the workload required to do proper gap analysis and activity reporting is often underestimated. The investment it takes to do proper verification and cleaning of data is one of the reasons why activity reporting processes often take time at both field and global level.

Finally, global level participants also raised challenges concerning the timeliness of quarterly reporting from the field level clusters to the GSC. Because data tends to be shared late, information on the GSC website (through the dashboards) is often outdated, which can be problematic both for information purposes, and with regard to advocacy and donors. Suggestions included increasing the frequency of reporting from the field to the GSC from quarterly to monthly, or revising the information contained in the factsheets with an advocacy lens.

To support these core IM activities, recommendations for the GSC included the revision of the type of information collected in 5Ws, and in turn the findings reported through the factsheets, to come up with a new proposal that is both realistic and provides a better picture of the response. In particular, the proposal

should include – as necessary – revised output and outcome indicators as well as an outline of what is considered “good enough” and “nice to have” in terms of reporting. Participants from the global level also highlighted the importance of gathering information on donors and funding, currently often missing from activity reporting tools. Guidance should also be produced on how to apply qualitative methodologies for response monitoring.

On the technical side, automating dashboard updates to avoid having outdated data and facilitating collection/processing of activity reporting at field and global level should be explored. In the long-long term, figuring out how to do real-time monitoring would also be ideal for better response monitoring and gap analysis. Through most discussions, it became apparent that the way in which responses are monitored needs to be improved.

Summary: IM processes & workstreams challenges, and how the GSC can better support

Practical challenges

- ✓ **IM Capacity:** gaps in terms of knowledge beyond technical IM skills (coordination, management, HPC); different levels of capacity among partners
- ✓ **Data availability:** not enough quality data to properly inform the response due to resources, capacity or access constraints, or too much with pressure to process it quickly
- ✓ **Data analysis:** too much time spent on the collection of data, rather than on the analysis; perceived bias
- ✓ **Data sharing:** Poor data sharing due to (1) fear of being judged for quality, (2) competition for funding, (3) and data protection issues
- ✓ **Activity reporting:** Activity reporting time-draining; Issues with data (accuracy, reliability); outdated data on GSC dashboards

Conceptual challenges:

- ✓ **Activities standards:** what is “good enough” given any context (incl. data poor, little access) vs. “nice to have” for core IM activities?
- ✓ **Methodological standards:** High standards within the sector that don’t align with realities on the ground; at the same time, descriptive analysis shouldn’t be sufficient evidence (does not allow to understand correlation, let alone cause)
- ✓ **Inter-sector analysis:** Shelter needs often not taken into account, usually to avoid double-counting, which conceptually doesn’t always make sense
- ✓ **Measuring Shelter severity:** No agreed upon way to measure the severity of Shelter needs; leads to improvisation based on available information and individual preferences
- ✓ **Outcome vs. output:** decisions and reporting are often based on output, problematic in itself and compounded because different measures are used

Theme 3: Tools & standards

1. IMAS toolkit

During the IM session, 8/20 respondents reported¹⁰ never having heard of the IMAS toolkit, and 8/20 reported rarely using it. In addition, when asked about the type of resources that would be useful to have in the toolkit, answers covered some already included resources. These responses lead to two key findings:

¹⁰ This information was collected through live polling during the IM session, and should therefore be considered as indicative only.

the first is that the IMAS toolkit needs to be revised and better disseminated, and the second that it needs to be more user-friendly and easier to navigate.

The IMAS toolkit has the potential to be a core resource and channel through which to provide guidance and reinforce capacity of IMOs both at the global level and across field teams, by compiling all useful documentation to accompany IMOs in their function. The toolkit was originally designed to align to the Coordination toolkit and to avoid being perceived as prescriptive in how the IM function should be rolled-out. However, by reinforcing its content with guidance documents that are flexible and clarify standards (“good enough” vs. “nice to have”) and ready-to-use templates and tools (as outlined throughout the review) as well as highlight useful platforms to facilitate IM activities (DEEP, Activity Info, Kobo), the usefulness of the IMAS toolkit would increase. Participants highlighted the usefulness of “minimum requirement” types of documents (see Protection example¹¹) to support the IM function.

Best practice examples from different field missions should also continue to be part of the toolkit, to make it more of a two-way stream resources and proactively encourage teams to share whenever they have strong IM ideas that benefit the whole community. In the long-term, the IMAS toolkit should be closely linked to the IM training as outlined under the first theme, both to facilitate the design of the training content and serve as a core resource for long-term capacity-building.

2. GSC website

Overwhelmingly, the website was considered as a rich source of information. However, challenges were raised with the ability to rapidly find specific information. As with the IMAS toolkit, feedback to the website in terms of desired features showed that better dissemination of its functionalities and making it more user-friendly would significantly improve the website’s value as a key resource to support IM, share knowledge, and highlight important outputs that result from IM activities, including data and analysis, both on the global and field-level pages. Feedback included implementing quick fixes to help find information more easily (better tagging, systematically including dates and authors), facilitate uploading files and organization of uploaded documents, and increasing engagement through the website, as the IM Community of Practice (COP) intends to do.

Other recommendations also included looking into either having better processes in place to update global pages, or removing outdated information, particularly through moving towards using easy-to-update global dashboards for the website to present key information, while ensuring that they are accompanied by narrative that promotes key advocacy messages and statements.

To note that the process of reviewing the website is also being launched by the GSC. The review will focus on how both back-end and front-end features of the platform can be improved to 1) facilitate user experience, 2) enhance the website as a platform for communication and advocacy, and 3) serve as a platform to manage the knowledge within the Shelter cluster.

3. Knowledge management

The IMAS toolkit and the website are considered the two main global interfaces for IM resources and outputs. However, several respondents encouraged to consider challenges with them as outlined above as part of broader issues related to knowledge management within the cluster.¹² Knowledge management issues that were for example raised during some of the discussions included coming up with standardized

¹¹ Global Protection Cluster, Minimum requirements for HNO, available [here](#).

¹² Knowledge management is beyond the scope of this IM review but is briefly mentioned here given the extent to which IM activities and outputs feed into the knowledge of the cluster.

filing systems, data storage management, common taxonomy, and so on. In turn, the relationship between IM and knowledge management also goes back to the scope of the IM function and the extent to which IMO should be responsible for robust knowledge management.

One respondent underlined that, over the last few years, focus has been on the front-end of IM activities. However, with the massive increase of data, information systems, digitalization, and actors, new risks have emerged when it comes to data responsibility, which reportedly call to now shift attention to the back-end systems.

Summary: How the GSC can better support on tools and standards to address above-mentioned challenges

- ✓ **Toolkits:** Develop ready-to-use toolkits for different assessments and contexts, with guidance on what is “good enough” in terms of methodology
- ✓ **Existing tools:** Revamp the IMAS toolkit, leverage IM COP
- ✓ **Standards:** Clarify “good enough” vs. “nice to have” and terminology
- ✓ **Training:** Provide IM training, focused on technical IM skills and coordination, understanding of the wider Cluster system, and coordinated assessments
- ✓ **HNO:** Provide surge support during HNO season and develop/update guidelines for Shelter PiN and Shelter contribution to the JIAF
- ✓ **Measuring / Understanding severity:** Develop a “Shelter index”
- ✓ **Activity reporting:** revise output/outcome indicators; revise the content of 5Ws, quarterly factsheets and dashboards; automate updates from country-level partners’ activity reporting to the global dashboards
- ✓ **Real-time monitoring:** explore ways to do real-time monitoring

Looking forward (the IM cluster function in 5 to 10 years)

Following discussions on perceived common IM challenges and best practices, respondents, particularly over the course of the second phase of consultations, were asked to outline their long-term visions (and hopes) for the direction of the IM function. The following hypothetical ideal scenario is based on ideas depicted by the respondents, summarizing common trends.

Within five to ten years, there is a much bigger pool of cluster IMOs from all over the world, with capacity built locally, who can connect the dots when it comes to information required to support the cluster function and have a better understanding and knowledge of national/local institutions that work on data related to population figures, demographics, and socio-economic factors. Additional investment would be required to ensure that, as much as possible, experienced IMOs work side-by-side with national IMOs to build their capacity to take on more senior IM positions.

The pool of IMOs would function both in protracted and sudden-onset settings, with a strong understanding and recognition of the values and principles embedded in the humanitarian sector and their activities within this sector. In addition, there would be much better understanding on the part of agencies and upper management of how IM fits into the sector.

Cluster IMOs would be supported as relevant by appropriate platforms and partners but would not necessarily be responsible for carrying out data collection and analysis activities; rather, they would work closely with a wide range of IM specialized partners to benefit from their expertise and products to inform decision-making of the cluster. Although IMOs would require to have the technical ability to understand data, platform, tools, ethical standards related to research, and able to carry out basic IM tasks, their role

would be a lot more of a “generalist” one, with strong coordination skills and knowledge of the humanitarian sector.

Through their generalist role, IMOs would be able to bring together the wide range of activities and products that can be used for decision-making, including research, advanced technical spatial analysis, development baseline data, and needs assessments. By having both a solid understanding of how the different pieces fit together and an overview of the information available in a particular context, the IMO would in turn be able to identify which methods are most appropriate given a particular context to inform specific information needs, while ensuring data responsibility. In this scenario, IMOs would no longer have to spend as much of their time on activity tracking, or the HNO, and would instead be able to also focus on activities and resources that support increased accountability to affected populations related to communication and advocacy. The first would be to reinforce two-ways stream engagement with affected communities by presenting findings in a way that is accessible and transparent. In addition, because advocacy and communication rely on information management (among other skills and competencies), the IMO would have a role to play in supporting advocacy efforts by identifying what type of information is available, how it can be used, what type of evidence it provides, and solutions (secondary data reviews, simple analysis) to address limited availability of data in certain contexts.

Better understanding of the IMOs’ role and their centrality in connecting the dots within the ever-increasing shift towards working with data in the sector would in turn encourage donors to increase funding for these types of positions, decreasing the workload, improving efficiency, and helping to retain staff.

In terms of landscape in five to ten years, there is a shared understanding of the IM cluster function, which is no longer hindered by unhealthy competition (both locally and globally) and blurry mandates. This would translate into even better coordination among agencies collecting data and improved collaboration and sharing through IM working groups. IMOs would also have to spend less time trying to defend their position or sectoral analysis in inter-sector forums.

By better understanding what resources the development sector has to offer, the IM cluster function would also be in a better position to engage with development datasets and IM tools, which would feed into improving preparedness of shelter responses, understanding of the context, vulnerabilities and risks to shelter, and in turn ability to monitor an evolving situation as well as the impact of a response. Examples of particularly relevant datasets include those related to housing, urban settlements, or simulations run to anticipate vulnerabilities and risks to shelter from different types of hazards. Engagement with development data actors would lead to more project-based collaborations, and would ensure access to good quantitative data, encouraging a shift towards better and more robust data in the humanitarian sector, and a more “medium-term” mind set in addition to the emergency one.

Over the course of the coming years, more effort will be dedicated to developing means of conducting real-time monitoring of shelter responses (for example through remote assessments and monitoring techniques and methodologies), situational analysis, and, down the line, forecasting for anticipatory actions. Within the set-up described in this scenario, the IMO’s role will be key in using these sorts of analyses to inform decision-making. Here too, collaboration with partners specialized in these sorts of tools will be essential, as these different areas will require a set of additional advanced technical skills.

A major area of focus will be the IMO’s position in terms of feeding into the shift towards tackling the climate crisis within humanitarian shelter responses, by ensuring that tools developed by environmental experts are systematically and appropriately used, through streamlining core environment indicators and questions during common sets of data collections (activity reporting, needs assessments, response monitoring, gap analysis).

In addition, any IM processes, activities, and workstreams will be embedded into a well-established and strong knowledge management system for the cluster, which ensures continuity and learning, and is framed by rules that reinforce data responsibility through clear data sharing protocols and data protection safeguards. As such, focus will have shifted from the front-end product to the back-end one, ensuring stronger accountability to IM processes.

For an overall streamlined and functional IM system, the IMO will have to somewhat return to basics, ensuring that every and each IMO is able to function in a crisis, aware of the landscape in which IM operates, and able to coordinate and engage with data partners.

Conclusion: Short-term and long-term recommendations for GSC

Based on the input that was provided throughout the several rounds of consultations, a series of cross-cutting recommendations are now formulated, including two for the short-term (2022) and six for the longer-term (next GSC Strategy).

- *Recommendation 1 (2022): Reinforce channels of support and capacity building from global level to the field*

The objective would be to address capacity gaps that were recognized and raised throughout the consultations, particularly during critical times such as rapid responses and the HNO season. In the short term, focus should be on improving, revamping, or reinforcing already existing channels. The first step would be to revise the current IMAS toolkit to make it more “ready-to-use” and to better disseminate it, while using the new upcoming website functionalities. The second would be to increase activity of the IM CoP and encourage knowledge sharing among participants. Finally, the GSC IM / Assessment team should anticipate and provide structured support during the HNO season, proactively identifying countries to be supported together with the GSC coordination team.

In addition to reinforcing existing channels, a frequently mentioned recommendation would be to explore the development of a comprehensive face-to-face training focused on IM and assessment coordination, similar to what is already in place for coordination. In the short term, initial steps could be taken to materialize and initiate its development.

- *Recommendation 2 (2022): Develop / Revise guidance and tools at the global level to facilitate core IM processes, clarify standards, including “good enough” ones, and terminology*

A “one size-fits-all” approach was not considered the best approach for IM and assessments. Instead, what would help is to have a better understanding of what is considered “good enough” versus what would be “nice to have.” The “good enough” would outline methodological and conceptual minimum standards which all clusters should follow, while having the flexibility to adapt the broader methodologies to their context.

On needs assessments and analysis, the first step should be to update the current assessment guidelines and develop ready-to-use toolkits with templates and indicator banks that field teams can pick and choose from, and adapt to their context. The next step, in alignment with the work being done with the SSC through the Vulnerability Working Group, would be to develop adaptable guidance for the HNO 2023 on how to calculate a Shelter-specific PiN, propose revised core needs indicators based on lessons learned from previous years, and update JIAF indicators accordingly.

For activity reporting and response monitoring, the recommendation is to revise the content of the 5Ws, then the quarterly factsheets, by considering advocacy needs and the information needed to understand how a response is evolving over time, by shifting from only reporting on outputs and rather focusing on the

outcomes of a response. In addition to revising activity reporting end-products, the way in which outcome and output indicators are measured and reported on, would also be revised and updated accordingly. Despite overwhelming agreement that this should be the way forward, one should note that switching from outputs to outcomes will require a significant shift in the type of information that is collected and might take time to implement.

- *Recommendation 3 (GSC Strategy): Build a large pool of skilled and trained IM staff to improve continuity in the IM function across missions and reinforce awareness of the IM function among key stakeholders*

The recommendation is to continue reinforcing short-term objectives in terms of capacity building to improve the IM function and increase retention. To achieve this goal, IM trainings would become institutionalized, similar to what already exists for coordination. Trainings would cover the IM function, soft skills, coordination, data responsibility, the “culture around data”, as well as how IM fits into other cluster work streams (advocacy, research, communication). The training would be preceded by an in-depth review of the IM competency framework for the Shelter Cluster (and in turn the standard) ToR, to highlight the different types of profiles needed for different types of responses and contexts. Including non-Shelter Cluster IM staff in this process should be considered (in alignment with possible standby partnerships). Finally, IM capacity-building should be extended and adapted to non-IM staff in coordination or senior management roles as well, to ensure better understanding of the function and manage expectations.

- *Recommendation 4 (GSC Strategy): Continue developing standardized analytical systems and methodologies, such as the Shelter Severity Classification (SSC), to provide an agreed-upon approach to measuring the severity of shelter needs, then build capacity to mainstream their use to reinforce the shelter “voice” when advocating for funding*

The development of standardized analytical systems addresses several practical challenges related to identifying core indicators, conducting analysis, and the HNO and PiN calculations that were raised during the discussions. In addition, developing analytical systems requires reflection and agreement among the shelter community on the broad conceptual questions related to how shelter needs should be measured, how to identify vulnerabilities and capacities, and what definitions / terminology should be used.

The development of standardized analytical systems is a long-term research and development process that will require significant investment over time. Building on the momentum of the SSC work stream launched in April 2021 for example, overseen by the GSC Vulnerability Working Group, the recommendation is to continue reinforcing the system currently under development over the next few years, and in turn, seek wider input and endorsement from the shelter community. While doing so, it will be important to ensure that the system is flexible enough to adapt and align as needed to broader shifts happening both within the shelter sector and beyond (methodological, technological, conceptual).

- *Recommendation 5 (GSC Strategy): Make use of improvements/sophistications in technology whenever relevant and appropriate to improve data collection, processing and sharing, within broader knowledge management systems of the cluster, without losing sight of the importance of the human factor in analysing a response in a highly unpredictable environment*

Whenever relevant and appropriate, the recommendation is to use improvements in technology accessible to the humanitarian sector to automate or facilitate certain Shelter cluster processes and systems, while improving the end-user experience. This recommendation goes beyond information management and will be important to implement within broader knowledge management considerations. In relation to IM

however, the recommendation is for (1) all IM functions to be screened to identify what can be automated and (2) map available technologies to identify the most appropriate for each of the IM processes.¹³ An example would be to find a way to directly link activity reporting data collected by partners to the GSC dashboards, to allow for timely and more frequent updates.

However, because decisions will continue to be made in unpredictable and ambiguous environments, it will be important to not fall into the trap of relying only on technological innovations to improve processes, in the spirit of maintaining the “human-centred” approach.

- *Recommendation 6 (GSC strategy): Through all IM guidance, templates, and tools, ensure that data protection, GBV, disability inclusion, and greening the response are explicitly included, while clarifying what it entails*

As the world – including the humanitarian system – for better or worse, goes digital, data protection considerations will become increasingly important to ensure that IM activities do no harm either to affected populations or those providing them aid. Conversely, strong data protection measures should not inhibit the importance of sharing data, and the recommendation would be to have clear protocols on how data sharing can be done in a safe way, potentially to the extent of considering developing data sharing protocols specifically for the shelter sector.

For greening the environment, the recommendation is to ensure that indicators developed by environment experts are systematically included in routine data collection and analysis processes (activity tracking, needs assessments, response monitoring assessments) to mainstream their use. IMOs should be trained on them to ensure their proper use.

Other cross-cutting priority topics of concern (GBV, disability inclusion) were not sufficiently covered during the discussions to extract specific findings. However, given the importance and priority of these topics for the cluster, the recommendation here is to ensure that they are included through all IM strategic work streams moving forward. Building on the work conducted by the Shelter Cluster through different work streams specific to GBV, disability inclusion and greening the response, the recommendation would be to develop specific guidance for needs assessments, analysis, HNOs, and response monitoring/gap analysis on how to integrate these priority cross-cutting themes. Ideas for this could include incorporating environment-related Shelter indicators when calculating PiN figures; ensuring GBV referral mechanisms are in place for any assessment; and including these priorities in IM strategies.

- *Recommendation 7 (GSC Strategy): Develop an approach to real-time monitoring of needs, factoring in vulnerabilities and risk, through better engagement with data collected by government or development actors*

The next step to current initiatives aimed at improving the ability to understand and measure the severity of shelter needs will be to find ways to conduct real-time monitoring. This will be achieved through better understanding of vulnerabilities and risk, facilitated through research & development workstreams and engagement with a wider set of data and partners than which is currently used to inform responses. The recommendation is to develop projects through engagement with development actors to bridge the gap.

¹³ The IM review does not provide specific recommendations on which software or technologies to use as this would require a more thorough digital transformation work stream to determine the best solutions for the Shelter cluster, factoring in a variety of elements such as cost, data privacy considerations, availability across different contexts and others.

What happens next

Many of the topics explored through the consultations barely scratched the surface of the many ways in which current best practices or ideas can be turned into opportunities to improve the overall delivery of the IM function of the Shelter cluster. When designing the workstreams identified through this IM review, it will therefore be important to closely engage with shelter clusters at the field level, as well as with IM specialists and partners, at each step of the way, to leverage experience and ensure that any resource or support is shaped in a way that is both useful and practical.