

# SFD Promotion Initiative Phase 3: Enhancing User Experience

Virtual meeting held on 9<sup>th</sup> September 2020, Hosted by University of Leeds

## Meeting summary

### Background

In Phase 3 the SFD-PI are working to enhance the tools and resources available to support users to produce an SFD graphic. The inherent simplicity of the SFD should make it accessible to a wide range of stakeholders. However, the experience from the SFD-PI (phases 1 and 2) suggests that the tools are often used incorrectly or only partially used, leading to the production of poor quality or unreliable SFDs. The meeting was part of a consultation on options for enhancing the user experience with SFD data collection and entry.

Prior to the meeting, a recorded presentation was sent to all participants on possible options for improving SFD data collection and entry, along with a request to prepare a one-minute statement highlighting their 'likes' and 'dislikes' regarding SFD data collection and the graphic generator (see Box 1).

#### **Box 1: Summary of participants' 'likes' and 'dislikes' regarding the SFD data collection and the graphic generator**

##### Likes:

- "Great advocacy document, it draws attention to issues of concern immediately"
- "Presents standardised data which enables comparisons between cities and over time"
- "The data and the SFD graphic can be saved and retrieved online and offline"
- "It is easy to understand both the graphic and generally the process by those in meetings and their colleagues"
- "It is a very visual tool and the SFD graphic highlights the point on the sanitation service chain where there are sanitation challenges in the study area"

##### Dislikes:

- "The description of sanitation technologies does not always fit the local context"
- "Local stakeholders (e.g. government officials) like the graphic but find difficult the process of gathering data, making judgements, filling the selection grid and matrix (especially first-time users)"
- "The lack of a standard questionnaire tool for the data collection"
- "Assessing the risk of groundwater pollution is very technical, there is a need for more guidance."
- "The text font size on the SFD graphics is small and not legible enough"
- "The review and approval system for SFDs is very slow and sometimes the responses are not clear"
- "The SFD graphic generator is available only in English (making it available in

The invited participants (see Annex 1) are experienced in either using the SFD graphic generator and preparing SFD reports, or experienced in developing and using other SFD type tools. Participants were divided into two meetings depending on time zones, with the agenda (see Table 1) repeated for both meetings.

The meetings were recorded and the video, audio and meeting room chat can be accessed via this [link to a Dropbox folder](#), which contains all meeting materials.

Table 1: Meeting agenda

Meeting 1 (UK, BST)	Meeting 2 (UK, BST)	Item	Facilitator
1000	1430	Housekeeping One-minute introductions: participant 'likes' and 'dislikes'	Barbara Evans
1030	1500	Summary presentation	Andy Peal
1040	1510	Discussion 1: Thinking about the graphical data entry tools in the presentation, what do you like and what do you not like?	Barbara Evans
1100	1530	Discussion 2: Are there other improvements we could make; what is not included?	
1120	1550	Discussion 3: Thinking about the SFD PI portal more widely, what other changes could encourage its wider use?	
1140	1610	Revisit your 'likes' and 'dislikes' (are we going in the right direction?)	Godwin Akpeimeh
1155	1625	Wrap up and next steps	Barbara Evans

## Summary of meeting discussion

### Discussion 1: What do you and do not like about the new graphical entry tool?

**1.1 Step by step approach:** Participants liked the proposed step-by-step approach to building the SFD graphic, observing that it provides an alternative way of entering data. They also agreed it was helpful for users to see summary versions of the SFD graphic after each step of the chain. However, they cautioned that although this provides additional functionality, users may be tempted to adjust the percentages to reflect a better outcome. It was observed that removing the red-green colour coding from the arrows on the data entry pages could reduce this temptation.

**1.2 Meeples or sliders:** Participants expressed a general preference for the slider version (rather than the meeples version), but there was no clear 'winner'. It was observed that the meeples version reminds users that sanitation is about people and that using a finite number of meeples (100) is a useful way of ensuring that all SFDs sum to 100%. The slider version was observed to be less 'gimmicky' and therefore more appropriate for a professional tool. Participants recommended use of the slider (or meeples) should be optional and that data entry by direct typing of numbers (as per the current tool) should be maintained.

**1.3 Population percentages and numbers:** For both the meeples and slider versions, it was suggested that the total population values could be shown (in addition to showing the

percentage of the population). It was also recommended that this function could be added to the current SFD graphic generator.

**1.4 Overall user-friendliness of a new tool:** Participants advised that if a new step-by-step data entry tool is designed, the overall user friendliness should be made a priority. Wider consultation with software developers and specialists was therefore recommended.

**Discussion 2: Are there other improvements we could make to the SFD graphic generator; what is not included?**

**2.1 Downloading and storing data:** Participants recommended that data from any new tool should be downloadable in line with the functionality of the current tool. This will enable uploading of the data to the SFD web portal, and facilitate sharing of data between users and with local stakeholders.

**2.2 Help and resources:** Participants liked the proposal to link the SFD graphic generator to resources on the web portal (e.g. to sections in the SFD manual, to graphics and to short 'helper' videos on the web portal). It was agreed that these links could help improve understanding and, for example, reducing misclassification of sanitation containment systems.

**2.3 Interactive cross-checking:** A more interactive SFD graphic generator was suggested that could include pop up questions for the user to answer. For example, for the user to confirm that they had finished entering data and were ready to move on to the next step in the SFD graphic building process.

**2.4 SFD graphic generator library with searchable map:** To help with finding cities on the SFD graphic generator library, it was recommended to show the reviewed cities on a searchable world map.

**Discussion 3: What other changes could encourage wider use of the SFD web portal?**

**3.1 Language:** Currently, most of the SFD web portal (including the graphic generator) is only available in English, with only the SFD manual available in French and Arabic. Participants recommended making available in other languages all the content on the SFD web portal, and especially the graphic generator.

**3.2 Identify SFD champions:** Participants recommended that identifying and building capacity of 'SFD champions' within organisations and service delivery institutions could help with promotion and use of the SFD process.

**3.3 Monitoring:** Participants made the following suggestions on using the SFD approach as a sanitation monitoring tool, which could potentially encourage wider use of the SFD web portal other than for generating SFD reports and graphics.

- **Validity periods for SFDs:** Introducing validity periods for SFDs could encourage organisations to carry out new SFDs when current validity periods have expired. Institutions and organisation could then monitor their progress towards safely managed sanitation.

- Recognising improvement: The SFD-PI could issue certificates to cities, institutions and organisations in recognition of continuous and progressive improvement towards safely managed sanitation.
- Benchmarking: A proposal was made to allow users to benchmark sanitation performances across regions, countries or cities on the SFD web portal.

**3.4 Sanitation photograph library:** Including an annotated digital photograph collection (especially on containment technologies and systems) on the SFD web portal, could help users better identify and classify sanitation technologies and systems. The photographs could be provided by sanitation practitioners, professionals and experts from across the world, with appropriate annotations and indexing.

**3.5 Standardise pre-processing of SFD data using spreadsheets:** Participants suggested that the SFD matrix be made compatible with external data processing software, such as MS Excel. For example, when producing an SFD users could access and complete standardised SFD Excel worksheets from which the data would be directly uploaded into the SFD matrix. This could help users who currently find it difficult to complete the SFD matrix.

## What we will be doing with this information?

The SFD PI team will be following up on the results of the consultation as follows:

### **A: Further development of the proposed new data entry interface**

Between now and June 2021 we will be commissioning and developing new data entry interface tools which will ultimately be included on the SFD portal as options alongside the existing graphic generator. Taking into account recommendations from this meeting, new interface development will consider the inclusion of:

- 1.1 Step by step approach
- 1.2 Sliders and possibly meeples or a variation on one of these approaches
- 1.3 Population percentages and numbers in addition to visual aids
- 1.4 A focus on the user-friendliness of a new tool
- 2.1 Clearer signposting to options for downloading and storing data
- 2.2 Clear signposting to help and resources
- 2.3 Interactive cross-checking as data are entered

Once the beta versions are available, we will be returning to this group to ask for your further input and comments.

### **B: Other improvements to the SFD-PI**

There were three suggestions which could be considered in Phase 3. These are:

- 3.1 Language – we will be reviewing options for including one or two additional language versions of any interface that we develop. The management team will review options for this and come to a decision by December 30, 2020.
- 3.2 Identify SFD champions – this falls within the scope of Phase 3, with a particular focus on identifying institutional champions who can support roll out of SFD use for advocacy and planning purposes inside major organisations. We will aim to run an advocacy and training event in Spring 2021. Participants in this meeting will be updated on progress on this initiative.

- 3.4 Sanitation photograph library – the suggestion to use photographs as references in data entry is excellent and we will explore options for this in both our new interface development and for the existing graphic generator.

### **C: Suggestions which fall outside the scope of SFD PI Phase 3**

Several other useful suggestions were made by participants which, while extremely pertinent and valuable, fall outside the scope of this phase of the SFD PI Phase 3. These include:

- 2.4 SFD graphic generator library with searchable map – the current library of SFD reports which includes a searchable map, is not linked to the graphic generator. This would be a good improvement but is not currently planned as it requires a major reconfiguration of the website.
- 3.3 Monitoring – the use of SFDs for periodic (rather than routine) monitoring purposes is encouraged where adequate data are available. Another work package in SFD PI Phase 3 does examine opportunities to link SFD data collection to SDG 6.2 monitoring. There are no plans to develop any additional tools or guidance on more general use of SFDs for local monitoring.
- 3.5 Standardise pre-processing of SFD data using spreadsheets. The high number of potential system configurations in the SFD means that ‘standardised’ spreadsheets that are compatible with the graphic generator are very large and cumbersome. SFD data were collected and processed using spreadsheets in the early stages of the development process. Due to their complexity these were replaced by the more flexible and intuitive graphic generator. There are no plans to redevelop standard spreadsheets, which would be large and complex. However, users in specific locations could develop their own bespoke spreadsheets to store data as it is collected.

## Annex 1: List of participants

SN	First name	Last name	Affiliation
1	Abdullah	Al-Muyeed	WaterAid, Bangladesh
2	Amrita	Angdembe	CWIS TA Hub, South Asia/ENPHO, Nepal
3	Erik	Baetings	IRC, Netherlands
4	Rathin	Biswas	IIT, Mumbai, India
5	James	Dumpert	USAID, USA
6	Boadi	Fiifi	Public Health Engineer Environmental Sanitation Professional, Ghana.
7	Leonie	Hyde-Smith	UoL, UK. Formerly GFA consulting, Germany
8	Unathi	Jack	EMANTI, South Africa
9	Ruth	Kennedy-Walker	World Bank, USA
10	Alix	Lerebours	WEDC, UK
11	Najib	Lukooya	KCCA, Uganda
12	Grant	Mackintosh	EMANTI, South Africa
13	Christopher	Moster	Consultant to Asian Development Bank, Philippines
14	Anna	Romelyn Almario	Consultant to Asian Development Bank, Philippines
15	Ruthie	Rosenberg	Citywide Advisory Services, Kenya and USA
16	Anjali	Sherpa	Nepal
17	Christian	Walder	Asian Development Bank, Philippines
18	Innocent	Kamara	K2, Uganda
19	Sanjay	Singh	Population Services International, India
20	Joana	Forte	GOAL and WSUP, UK
21	Aldy	Mardikanto	BAPPENAS, Indonesia
22	Krishna Ram	Yendo	CWIS TA Hub, South Asia/ENPHO, Nepal