AI for M&E Data Management

Review

1. A report says: “We trained 60 staff.” What should you investigate to explain the result?
   A. What changed, and what evidence shows it?
   B. Who facilitated each training session?
   C. How many sessions were delivered?
   D. Which venue hosted the training?

2. What does “So what?” ask you to explain in a results report?

A. How many people attended.

B. How the activity was organised.

C. When the activity took place.

D. Why the change matters to those affected

3. An indicator is below its target. What should the narrative report include?

A. The target value presented as the actual result.

B. Actual progress, reasons, and corrective actions.

C. A lower target without explaining the change.

D. Successful activities, leaving out the shortfall.

4. Your NGO and two partners jointly supported a policy change. Which reporting approach is most honest?

A. Claim your NGO alone achieved the policy change.

B. Explain your contribution and acknowledge the partners' roles.

C. Describe the change without mentioning any contributors.

D. Claim an equal contribution without checking the evidence.

Please discuss these questions:

1. What is one useful lesson you remember from the last forum?
2. How have you applied that lesson in your work? Please share one example.
3. What challenges do you still face when collecting evidence or writing reports?

AI for M&E Data Management

WHAT PARTICIPANTS WILL DO

Expected Results

1 Prompt

Write clear instructions for Excel data tasks.

2 Build

Create safe dummy tables.

3 Review

Inspect structure, missingness, codes and duplicates.

4 Clean

Standardize text, IDs, dates and numeric fields.

5 Summarize

Produce a small PivotTable and chart.

RESPONSIBLE AI

Ethical and safe use of AI for data management

Protect people, preserve confidentiality, and keep human accountability.

1 Minimize data

Use synthetic or de-identified data. Remove names, phone numbers, addresses, IDs, GPS points, and unnecessary sensitive fields.

2 Use approved tools

Use the organization's authorized Microsoft 365 account and approved storage. Do not upload project data to personal or public AI tools.

3 Control access

Apply least-privilege access, secure sharing links, and existing retention rules. Share outputs only with authorized colleagues.

4 Check before sharing

Review prompts, formulas, summaries, and exports for exposed identifiers, fabricated results, bias, and disclosure risk.

5 Keep accountability

AI supports the workflow. The M&E officer remains responsible for consent, interpretation, corrections, and final approval.

6 Report incidents

Stop processing if confidential data is exposed. Preserve evidence and follow the organization's data-breach reporting procedure.

Before using Copilot: classify the data • remove identifiers • confirm authorization • review the output before saving or sharing

Golden rule: If the data should not be shared with an unauthorized person, do not paste it into an unapproved AI service.

PROMPT WRITING

Use ABC to write your prompt

A simple structure for clear, reliable instructions.

A Act

Give AI a role.

B Be specific

Explain exactly what you want.

C Context

Provide the dataset, purpose, and relevant information.

Good prompt = clear role + precise output + enough context

Always tell Copilot not to guess missing categories or labels.

Prompts for Dummy Tables

ABC PROMPT 1

Socio-demographic information

Copy, adapt the bracketed details, and paste into Copilot in Excel.

A

ACT

Act as an M&E expert/data analyst.

B

BE SPECIFIC

Create a dummy table showing province, district, child sex, and child age group. Use columns: Variable, Category, Frequency (n), and Percentage (%). Leave results blank.

C

CONTEXT

Use the attached ENRICH dataset and its Remarks sheet. This table is for NGO staff training. Use only documented categories and flag unclear information.

Safeguard: use documented categories only; do not invent categories or results.

ABC PROMPT 2

Survey questions

Copy, adapt the bracketed details, and paste into Copilot in Excel.

A

ACT

Act as a survey data analyst.

B

BE SPECIFIC

Create a dummy table for question [question number and wording]. Include response categories, Frequency (n), and Percentage (%). Add a clear title and leave results blank.

C

CONTEXT

Use the attached dataset and these response labels: [insert labels]. The table will support baseline reporting. Do not guess missing labels.

Before running: replace both bracketed fields with the exact question and response labels.

ABC PROMPT 3

Multiple-response questions

Copy, adapt the bracketed details, and paste into Copilot in Excel.

A

ACT

Act as an M&E officer.

B

BE SPECIFIC

Create a dummy table for [insert question], where respondents can select several answers. Include Response option, Frequency (n), and Percentage (%). Leave results blank.

C

CONTEXT

Use these dataset columns and response labels: [insert details]. State who will be included in the percentage denominator and note that percentages may exceed 100% when added together.

Key check: define the denominator and explain why summed percentages may exceed 100%.

ABC PROMPT 4

Compare groups

Copy, adapt the bracketed details, and paste into Copilot in Excel.

A ACT

Act as a data analyst.

B BE SPECIFIC

Create a dummy table comparing child age groups across provinces. Use columns: Age group, P1 n (%), P2 n (%), P3 n (%), and Overall n (%). Leave results blank.

C CONTEXT

Use q2 and Province from the attached ENRICH dataset. Use the documented age categories. Percentages should be calculated within each province.

Denominator rule: calculate percentages within each province, not across the full sample.

ABC PROMPT 5

Review an existing dummy table

Copy, adapt the bracketed details, and paste into Copilot in Excel.

A

ACT

Act as an M&E expert.

B

BE SPECIFIC

Review my dummy table. Check the title, variables, categories, totals, and percentage denominator. Explain the problems briefly and provide an improved blank table.

C

CONTEXT

Compare the table with the attached dataset and Remarks sheet. It is for NGO staff training. Flag missing information instead of guessing.

Expected output: brief review findings plus an improved blank table.

Prompts for Cleaning Data

ABC PROMPT 6

Check the data

Use this prompt in Copilot after confirming the correct workbook and sheets.

A ACT

Act as a data analyst.

B BE SPECIFIC

Find missing values, possible duplicates, and inconsistent entries. List the issues without changing the data.

C CONTEXT

Use the attached ENRICH dataset and Remarks sheet. Do not guess unclear codes.

Expected output: an issue log only. No data should be changed.

ABC PROMPT 7

Clean the data

Use this prompt in Copilot after confirming the correct workbook and sheets.

A

ACT

Act as a data cleaning specialist.

B

BE SPECIFIC

Remove extra spaces and fix clear formatting errors. Save a cleaned copy and list the changes.

C

CONTEXT

Use the attached ENRICH dataset. Keep the original unchanged and flag uncertain values.

Expected output: a cleaned copy plus a transparent change log.

ABC PROMPT 8

Validate the data

Use this prompt in Copilot after confirming the correct workbook and sheets.

A

ACT

Act as a data validation officer.

B

BE SPECIFIC

Check response codes, child age groups, and the two child sex columns. List any disagreements.

C

CONTEXT

Use the cleaned ENRICH dataset and Remarks sheet. Flag unclear values instead of correcting them automatically.

Expected output: a validation report listing disagreements and unclear values.

Use prompts for each cleaning rule

Text	Add Clean_InterviewerID using uppercase and trimmed text. Do not replace the original column.
Dates	Add Clean_InterviewDate. Convert valid dates to yyyy-mm-dd and return “Review” for invalid values.
Codes	Add QA_childsex. Return OK only for 1 or 2; otherwise return Review.
Ranges	Add QA_Weight and QA_Height using the agreed training ranges. Keep original measurements.
Duplicates	Create a duplicate key and flag matching rows. Do not delete any row.
Log	Create a Cleaning_Log sheet with rule, affected column, affected rows, action and reviewer decision.

Practice


Prompt Engineering
for Civil Society Organizations
From better prompts to greater impact
Copilot
for Microsoft 365
INPUT
Act as a data analyst for an NGO working on child nutrition.
Using the ENRICH dataset, clean the data and check for errors.
Summarize key findings in a table and chart.
PROCESS
Understand
Analyze
Reason
Create
Refine
OUTPUT
Clean and validated data
Summary table and charts
Clear insights
Ready for reporting and decision-making
Health
Child Protection
Good Governance
Better Data Brighter Futures
Context
Be Specific
Act As
Refine
People
Data
Action
Act As
Be Specific
Context
Format Output
Add Data
Refine
DATA FOR IMPACT
AI FOR CSOs
LEARNING TOGETHER

Participant practice

1. Practice: Create a dummy table and analyse the data

- Choose **child age group (q2)** or **child weight (WEIGHT)** from the baseline dataset.
- Write an **ABC prompt** asking AI to:
- Create a dummy table with a clear title and blank results.
- Analyse the selected variable and fill in the table:
    - **Age group:** frequency and percentage.
    - **Weight:** valid responses, mean, minimum, and maximum.
- Report missing or unclear values separately.
- Explain the main findings in 2–3 simple sentences.

2. Develop an M&E plan or IPTT

Choose one indicator from the ENRICH M&E framework. What prompt would you write to ask AI to develop either:

- An **M&E plan** showing the indicator, definition, data source, collection method, frequency, and responsible person; or
- An **IPTT** showing the indicator, baseline, target, actual result, and achievement percentage?



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Thank You So Much!