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# HOW-TO NOTE: ADDRESSING THE PRINCIPLES FOR DIGITAL DEVELOPMENT IN PROJECT AND ACTIVITY DESIGN



## HOW-TO NOTE:

# ADDRESSING THE PRINCIPLES FOR DIGITAL DEVELOPMENT IN PROJECT AND ACTIVITY DESIGN

**This Note discusses how to integrate the Principles for Digital Development into USAID project and activity design to support successful outcomes.**

### WHEN SHOULD THIS HOW-TO NOTE BE USED?

**This How-To Note should be used by design teams when a USAID project or activity includes a digital intervention.** Consideration of the Digital Principles at the beginning of the design process will help USAID mitigate risks, whatever the size of the intervention.

### WHERE CAN I FIND SECTOR-SPECIFIC GUIDANCE?

Sector-specific resources can be found by reaching out to the appropriate USAID operating unit. For introductions to Agency experts, please contact [digitaldevelopment@usaid.gov](mailto:digitaldevelopment@usaid.gov).

### WHERE CAN I FIND A DIGITAL ADVISOR TO ASSIST THE PROJECT OR ACTIVITY DESIGN TEAM?

Digital Development Advisors (DDAs) and specialists can participate in the design process. Sources for support include regional and technical Bureau Digital Development Advisors and the Technology Division, which staffs experts in digital topics such as inclusion, cyber, financial services, data governance, emerging technology, artificial intelligence, literacy, gender, policy, connectivity, climate, e-government, and research. Please contact [digitaldevelopment@usaid.gov](mailto:digitaldevelopment@usaid.gov) for introductions.

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*How-To Notes are published by the Bureau for Policy, Planning, and Learning and provide guidelines and practical advice related to the Program Cycle to USAID staff and partners. This How-To Note supplements USAID ADS Chapter 201.*



# INTRODUCTION

This document supports USAID design teams in integrating the Principles for Digital Development (Digital Principles) into the USAID project and activity design process. It describes how to improve development outcomes and minimize the risk of negative consequences, such as loss of privacy and exacerbated inequalities.

## THE HOW-TO NOTE IS COMPOSED OF FOUR PARTS:

### SECTION 1 • *Background*

Background on the Digital Principles and why they are endorsed by USAID. This can be used by the **design lead or digital advisor** to orient the team to the Principles.

### SECTION 2 • *Checklist*

Checklist for incorporating the Principles into the design process. This can be used by the **design lead or digital advisor** to help the team monitor its efforts.

### SECTION 3 • *Worksheets*

Worksheets to guide completion of the checklist and help the design team prioritize which Principles are most important to the success of the USAID project or activity. These can be used by the **digital advisor**.

### SECTION 4 • *Guide*

Guide to the Digital Principles discussing each Digital Principle in the context of activity design and providing sample questions to include in the USAID design or award language. This can be used by the **digital advisor**.

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## SECTION 1

# WHAT ARE THE DIGITAL PRINCIPLES?

Digital technology has increased reach, efficiency, and cost-effectiveness in development, yet many groups still face barriers to access. Technology has also amplified concerns over data sovereignty, privacy, and the spread of misinformation.

The Principles for Digital Development provide guidance to help donors and implementing partners integrate digital technology into development and humanitarian assistance. The Digital Principles codify decades of knowledge of what does and does not work in digital development.

More than 300 organizations have endorsed the Principles for Digital Development, which are stewarded by the Digital Impact Alliance (DIAL). USAID was among the original drafters and initial endorsers of these Principles.

The Digital Principles are integral to the implementation of USAID's Digital Strategy, which charts an Agency-wide vision for development and humanitarian assistance in the world's rapidly evolving digital landscape.

### WHICH RESOURCES ARE AVAILABLE?

- **Digital Principles website:** Access free online courses, case studies, podcasts, and resources.
- **USAID's Digital Investment Tool:** A more comprehensive version of this How To Note.
- **Digital Principles courses on USAID University:** USAID staff can take online, self-paced courses.
- **Digital Principles virtual workshops:** Arrange a workshop for Missions and implementing partners.
- **USAID's Get Smart Guide:** Staff can use this to identify topical resources that are most critical to their work. Contact [digitaldevelopment@usaid.gov](mailto:digitaldevelopment@usaid.gov) for information.

## Principles for Digital Development



DESIGN WITH THE USER



UNDERSTAND THE EXISTING ECOSYSTEM



DESIGN FOR SCALE



BUILD FOR SUSTAINABILITY



BE DATA DRIVEN



USE OPEN STANDARDS, OPEN DATA, OPEN SOURCE, AND OPEN INNOVATION



REUSE AND IMPROVE



ADDRESS PRIVACY AND SECURITY



BE COLLABORATIVE

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## SECTION 2

# CHECKLIST FOR THE DESIGN PROCESS

The following steps will help the design team incorporate the Digital Principles into USAID Project and Activity design documents.

PHASE	STEP	STATUS	EXPLANATION
1. SET YOUR FOUNDATION	1A. Include a digital development advisor on the design team.		
	1B. Refer to the digital landscape in the design or award. <b>☆TIP</b> Resources include country ICT strategies, <a href="#">Digital Ecosystem Country Assessments</a> , and sector-specific reports.		
2. IDENTIFY YOUR DIGITAL INTERVENTIONS	2A. Identify digital interventions that can be re-used to address the development challenge. Brainstorm other needs. <b>☆TIP</b> Reusing and improving existing interventions supports sustainability.		
	2B. Select digital interventions that will be incorporated into the design or award. <b>☆TIP</b> Establish a link between the selected interventions and the project or activity objectives.		
3. SET UP FOR SUCCESS	3A. Incorporate findings from existing assessments of the selected digital interventions into the design or award. For example, the <a href="#">Digital Principles Maturity Assessments</a> .		
	3B. Select Digital Principles to incorporate into the design or award.		
	3C. Incorporate monitoring, evaluation, and learning needs related to the digital intervention into the design and or award. <b>☆TIP</b> See the <a href="#">Digital Principles Indicators</a> .		

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## SECTION 3

# PHASES & WORKSHEETS

These worksheets help the digital development advisor prepare the necessary items to complete the checklist in Section 2 and help ensure that:

- The responsibilities of the digital development advisor are clear to the design team.
- The digital interventions are aligned with the Mission's development objectives.
- The digital interventions are suited to the digital ecosystem.
- The project or activity design is informed by the Digital Principles

## PHASE 1: SET YOUR FOUNDATION

### STEP 1A INCLUDE A DIGITAL DEVELOPMENT ADVISOR ON THE DESIGN TEAM

Select a person to be responsible for making certain that the Digital Principles are used during project or activity design. This person will work with the design team on digital development and with Monitoring, Evaluation, and Learning (MEL) specialists to establish indicators to monitor digital development-related outcomes.

If the USAID Mission does not have a digital development advisor in the project or activity domain, consult the ITR Hub's Technology Division ([digitaldevelopment@usaid.gov](mailto:digitaldevelopment@usaid.gov)) in the Bureau for Development, Democracy, and Innovation for introductions to specialists.

**Who will serve as the digital point of contact for the design team?**

**Which members of the project/activity design team have knowledge of digital issues related to the proposed project?**

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**If digital development knowledge does not exist within the project or activity design team, what is the plan for acquiring support?**

**What additional organizations may we need to consult during the project or activity design? Consider other development agencies, government, non-government, private sector, and/or civil society partners.**



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**STEP 1B UNDERSTAND THE EXISTING ECOSYSTEM**

The digital ecosystem influences a project or activity. Interventions designed without acknowledging the landscape may duplicate efforts, limit data sharing opportunities, and contribute to a fragmented ecosystem. Digital interventions designed without an understanding of local (national, state, district) policies may not scale and may violate local standards.

Review country-wide and sector-specific strategies and assessments. Check to see if there is a [Digital Ecosystem Country Assessment \(DECA\)](#) for your country. In the absence of information on the digital ecosystem, conduct a rapid landscape assessment to determine if the level of digital maturity within the context is low, medium, or high. Conduct a rapid review on an aspect of the digital ecosystem that might influence a project or activity (eg. data ecosystem, e-government, private sector capacity, digital literacy).

**Which assessments and reports are relevant to the activity or project design?**

**After reviewing the documents, which aspects of the digital ecosystem might affect the activity or project? Consider connectivity, digital literacy of end users, interoperability of systems, social media fluency, misinformation, and freedom of expression online.**

**Which statements will you include in the design or award? Use this space to draft text.**



**Digital Ecosystems**  
include the stakeholders,  
systems, and enabling

environment that together  
empower people and communities  
to use digital technology in  
order to gain access to services,  
engage with each other, or pursue  
economic opportunities.



## PHASE 2: IDENTIFY YOUR DIGITAL INTERVENTIONS

### STEP 2A IDENTIFY POTENTIAL DIGITAL INTERVENTIONS

Most USAID activities have a range of opportunities to apply digital technology. Digital technology is not a solution unto itself, but it can enable increased access to or acceleration of the outcomes of interventions. These benefits must be balanced with mitigation of potential harms, including cybersecurity threats, digital repression, exclusion, and misinformation.

The past 20 years have seen many digital development projects of varying levels of scale and success. Before embarking on a new project or reinventing an old one, it is important to know which digital interventions have been used in the past or are currently in use and how successful they have been. Adapting existing tools enables alignment with the [Digital Principle: Reuse and Improve](#).

**Are there existing digital interventions that can be re-used to address the development challenge? Are there others that should be considered?**

USAID design teams can access the Think Digital: Get Started Guide for support in identifying digital interventions by contacting [digitaldevelopment@usaid.gov](mailto:digitaldevelopment@usaid.gov).



The phrase “digital intervention” describes the digital technology and the partner’s hardware and software, as well as complementary activities needed to ensure a technology’s effectiveness.

Complementary activities may include training and capacity building, supporting governance and standards, addressing misinformation, and finding pathways for sustainability, maintenance, and upgrades.

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**STEP 2B SELECT DIGITAL INTERVENTIONS TO INCLUDE IN THE DESIGN OR AWARD**

Digital technology may be proposed as a cure-all for development problems, but it is important to determine whether the proposed interventions fit the problems and the ecosystem. Without ensuring that the digital intervention is appropriate for the problem, especially as defined by local stakeholders (Digital Principle: Design with the User), you run the risk of misusing technology rather than serving the development outcomes you wish to achieve.

A useful starting point is to include proposed digital interventions within the project or activity Theory of Change. Align potential digital interventions with outcomes in the chart below. During implementation, use appropriate monitoring, evaluation, and learning methods to validate the proposed change pathways.

STRATEGIC OBJECTIVE/RESULT	RELEVANT DEVELOPMENT INTERVENTIONS	RELEVANT DIGITAL INTERVENTIONS

**Once potential digital interventions are aligned with the project or activity results, which should you keep, which should you cut?**

**☆ TIP** Digital technology may not be appropriate to a particular development challenge. Making an informed decision to *not* include digital technology in a project or activity can be strategic. In some instances, the USAID design team may choose a hybrid approach that combines digital technology interventions with non-digital interventions. This may be appropriate in geographies where some have access to the internet and to phones, while others do not.



## PHASE 3: SET UP FOR SUCCESS

### STEP 3A IDENTIFY RESOURCES THAT ARE RELEVANT TO THE DIGITAL INTERVENTION

It is important to review how well the existing digital technology interventions have worked.

**Which documentation, assessments, and evaluations refer to the digital intervention of interest?**

**What institutions, networks, communities, platforms, and projects are relevant to the prioritized digital intervention? Who will the USAID design team and/or the implementing partner need to collaborate with?**

#### RESOURCES THAT CAN SUPPORT THIS:

- The [Digital Principles Maturity Matrix for Program Design and Evaluation](#).
- The [USAID Digital Ecosystem Evidence Map \(DEEM\)](#).

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**STEP 3B** SELECT DIGITAL PRINCIPLES

While it is good practice to apply all of the Digital Principles to all digital development interventions, it is useful to first understand which are most applicable to your intervention. Addressing two or more of the Digital Principles often leads to consideration of others. See [Section IV](#) for considerations for when to prioritize each of the Digital Principles.

Once the team has identified their digital interventions, select a minimum of three Digital Principles that will be most useful to include in the solicitation.

SELECTION	DIGITAL PRINCIPLE	WHY IS THIS PRINCIPLE IMPORTANT TO THE PROJECT OR ACTIVITY DESIGN?
	Design with User	
	Understand the Existing Ecosystem	
	Design for Scale	
	Build for Sustainability	
	Be Data Driven	
	Use Open Standards, Open Data, Open Source, and Open Innovation	
	Reuse and Improve	
	Address Privacy and Security	
	Be Collaborative	



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**STEP 3C INCORPORATE MONITORING, EVALUATION, AND LEARNING NEEDS**

Incorporate monitoring, evaluation, and learning needs related to the digital intervention into the design or award.

**What collaboration, learning, and adaptation opportunities should be considered? Should specific indicators or assessments be requested in the design or award?**

**☆TIP** See the [Digital Principles Indicators](#) for examples. If an assessment on the digital intervention has not been conducted, a [Digital Principles Maturity Matrix for Program Design and Evaluation](#) can be included as a recommended task in the project or activity design document.



## SECTION 4

# QUICK GUIDE TO THE DIGITAL PRINCIPLES

This guide discusses each Principle in the context of activity design and provides sample questions to include in the USAID design or award language. It is based on the [USAID Digital Investment Tool](#) and [Digital Impact Alliance \(DIAL\)](#) resources.

### DESIGN WITH THE USER



Understanding and co-creating with users and soliciting their feedback throughout the implementation process will result in a more usable tool with a greater chance of being adopted, and will increase user ownership of the intervention.

#### Key questions to include in a project design if you prioritize *Design with the User*:

1. Who are the users (typically defined as the individuals who will interact with the technology, such as community healthcare workers using contact tracing applications)?
2. How will you develop an understanding of their needs, preferences, and abilities (e.g., user profiles, focus groups, testing, and iterating)?
3. How can user needs assessments incorporate considerations related to gender, people living with disabilities, children, or other disenfranchised or marginalized populations who might either engage with or benefit from the digital intervention? These may include considerations for digital literacy as well as privacy and security.

### RESOURCES

- [Digital Principle: Design with the User](#)
- [IDEO: The Human-centered Design Toolkit](#)



*Designing with the User* is

especially important when introducing a digital intervention to a new environment or target user group.

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## UNDERSTAND THE EXISTING ECOSYSTEM



Although it is recommended that you start with *Understand the Existing Ecosystem* as part of the overall process, you may also consider prioritizing it within a project design.

## Questions that can be included in a project design:

1. Which aspects of the underlying ecosystem might a digital technology intervention rely on? Consider connectivity, digital literacy of end users, interoperability of systems, social media fluency, freedom of expression online.
2. Which institutions, networks, communities, platforms, and projects are relevant to the target users and prioritized digital interventions?
3. What additional targeted research is needed to better understand how the ecosystem might help or hinder the digital technology intervention?

## RESOURCES

- [Digital Principle: Understand the Existing Ecosystem](#)

## DESIGN FOR SCALE



Strategies for maintaining digital technology may vary at different levels of scale. Technological components such as hardware, software, and bandwidth may need to be changed as usage, users, and connections increase. Capacity building and system support activities can be built into the budget and schedule as the scale changes.

## Questions to include in a project design:

1. How is scale defined? What phased approach will help us reach scale?
2. Which components of the digital intervention can be scaled as-is and which will need to be adapted or upgraded as scale or scope increases?
3. What additional support activities or collaboration with other institutions or development projects or activities in the country or region are needed for the desired scale of the digital intervention?

## RESOURCES

- [Digital Principle: Design for Scale](#)
- [mHealth Assessment and Planning for Scale Toolkit](#)

**Understand the Existing Ecosystem**

should be prioritized in project designs where there is very little known about the digital ecosystem and policy landscape.

**Design for Scale** should

be considered for all digital interventions for which the aim is to cover large geographic areas, populations, or development sector institutions and professionals.



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### BUILD FOR SUSTAINABILITY



It is important to plan from the beginning for the long-term institutionalization and costs of a digital intervention. This can be done in collaboration with host government institutions, implementing partners, international agencies, and the private sector. Introducing new processes and tools can have a disruptive effect on a workplace and country system. Change management can communicate to stakeholders the importance of the intervention that is being developed, how it will impact their work, and how they will benefit.

#### Questions to include in a project design:

1. What is the intended sustainability for the initiative (time-bound, transition to maturity sustaining or commercial model, long-term ownership by another entity)?
2. What is the projected revenue or funding streams for the digital intervention?
3. Does the budget include an accounting for costs for immediate and future system configuration and deployment, training, user testing, and transaction, service, or licensing fees replacement of equipment as well as ongoing administration and maintenance such as system upgrades and bug fixes?
4. Which local support systems are needed to support the long-term implementation and maintenance of the digital intervention?
5. Which local institutions and stakeholder groups should the project collaborate with to generate long-term buy-in and sustainability? What aspects of the project will be most important to each institution or stakeholder group?

#### RESOURCES

- [Digital Principle: Build for Sustainability](#)



#### *Build for Sustainability* is

important for long-term digital interventions that USAID will not support indefinitely. This can be accomplished through collaborations (see Digital Principle: **Be Collaborative**) and through an accounting of the Total Cost of Ownership.



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## BE DATA DRIVEN



It is important to design feedback and data collection processes to generate information that supports effective decision-making. Data generated by the digital intervention should be used to inform intervention optimization (e.g., learning and adapting based on performance indicator data or managing supply chains based on commodity data). It is important to consider investments in building a culture of data use.

## Questions to include in a project design:

1. How will data generated through the digital intervention be used to strengthen the overall project?  
Which data analyses and skills will be needed to make informed decisions about project performance?
2. Which local stakeholders will most benefit from the data generated through the digital intervention?  
How can data be shared with prioritized users individually or collectively?
3. How can data literacy and a data-use culture be built into the activity to improve overall project performance?

## RESOURCES

- [Digital Principle: Be Data Driven](#)
- [Bridging the Gap: How Real-Time Data Can Contribute to Adaptive Management in International Development](#)


**Be Data Driven**  
should be

prioritized for project design where there is limited information about the needs and behaviors of prioritized users. This should be done through a participatory process where it is clear how the data will be collected and shared with prioritized users to provide greater insights into their individual and collective needs and behaviors (see *Open Data*). It should also be prioritized as part of monitoring, evaluation, and learning for projects where the digital intervention is a significant component of the overall project.



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## USE OPEN STANDARDS, OPEN DATA, OPEN SOURCE, AND OPEN INNOVATION



Sharing information is easier with open standards and open data. Open standards are specifications developed, agreed to, adopted, and maintained by a community that enable data sharing across systems. Open data is publicly available data that can be universally, readily, and freely accessed, used, and redistributed. Using open source software, institutions are less susceptible to being locked into a particular vendor. Open source software is equipped with source code that anyone can view, copy, modify, and share. Where there are gaps in digital technology functionality or interoperability, open innovation can help address known gaps. Open innovation is a management model that promotes collaboration with people and organizations outside the company. The model may incorporate alliances between companies, agreements with universities, and crowdsourcing competitions.

### Questions to include in a project design:

1. What are the opportunities to include open standards, open data, open source, and open innovation in the project design?
2. If the activity develops new software code, how can it be developed as open source, so others can copy, modify, and share?

### RESOURCES

- [Digital Principle: Use Open Standards, Open Data, Open Source, and Open Innovation](#)
- [Open Data Handbook](#)
- [Code Innovation Primer on How to Use Open Source Code and Creative Commons in International Aid Programs](#)



### Use Open Standards, Open

**Data, Open Source, and Open Innovation** should be prioritized when the digital intervention is focused on technology, data, and/or innovation. Taking an open approach will increase opportunities for collaboration and integration and data exchange with other digital interventions to create a multiplier effect.



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## REUSE AND IMPROVE



Although each project and country context is unique, many common elements, messages, approaches, workflows, and code bases have been developed to address common digital intervention needs and challenges. Reusing and adapting these resources can speed time to implementation, reduce costs, and improve the base of digital public goods available to others.

## Questions to include in a project design:

1. Which digital interventions have been used or appear to show promise in achieving the prioritized result in your country or sector? In other countries or sectors?
2. Is there documentation, assessments, or evaluations for the digital intervention?
3. Has the [Digital Principles Maturity Matrix for Program Design and Evaluation](#) been used to assess the prioritized digital intervention? If not, has it been included as a recommended step in the project or activity design document?

## RESOURCES

- [Digital Principle: Reuse and Improve](#)
- [WHO Digital Health Atlas](#)
- [Digital Tools in USAID Agricultural Programming](#)
- [DIAL's Catalog of Digital Solutions](#)

*Reuse and Improve* should

be considered if there is a digital intervention or component (such as content or training curriculum) that has been implemented in other contexts and can be adapted to the new environment or that may have been implemented in the same context, but in a different sector or project.



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## ADDRESS PRIVACY AND SECURITY



Digital systems may deal with sensitive personal or organizational information. Information must be managed responsibly. Fear of loss of privacy may be a barrier to the use of an intervention or to seeking access to services. Security breaches are damaging for governments and have a negative impact on public confidence.

### Questions to include in a project design:

1. What are the relevant national privacy and security regulations?
2. Has a risk/benefit analysis been performed on data that is either currently captured or will be captured within the digital intervention? How can data collection be minimized?
3. Who owns the data and who has access? Where is it stored? How is it transmitted? What protections have been put in place to secure it?
4. If you work with vulnerable populations, have you considered how their data may need special protection?

### RESOURCES

- [Digital Principle: Address Privacy and Security](#)
- [USAID Operational Policy on Information Systems Security \(ADS 545\)](#)
- [Considerations for Using Data Responsibly at USAID](#)



**Address Privacy and Security** is

especially relevant in projects that use digital technology tools to collect and use personal identifiable data.

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### BE COLLABORATIVE



Successful initiatives will engage key groups throughout the initiative development lifecycle, and contribute resources back to the broader stakeholder community. Understanding and addressing stakeholder needs and concerns early and communicating them consistently can improve the likelihood of success. It is important to identify how best to support interoperability with other systems.

#### Questions to include in a project design:

1. Which stakeholders are most relevant to the digital intervention?
2. Who else is trying to solve this problem? How are they attempting to do this? How can you collaborate with them?
3. What is the best way to engage each of the key stakeholders?
4. Which other digital technology systems can maximize the benefits of the prioritized digital intervention? What will it take to support interoperability between systems?

### RESOURCES

- [Digital Principle: Be Collaborative](#)



*Be Collaborative* should be

prioritized for digital interventions that are entirely or predominantly dependent on external stakeholder engagement. Most digital interventions are collaborative as few entities are able to fully design, implement, scale, and evaluate an intervention on their own.



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[usaid.gov/usaid-digital-strategy](https://www.usaid.gov/usaid-digital-strategy)

