

# MIXED METHODS FOR BETTER TARGETING

## Insights from the UNHCR-WFP's Joint Hub

This paper is intended for humanitarian practitioners, particularly those engaged in the analysis and design of basic assistance programmes. It explores the benefits and challenges of mixed-method targeting approaches in WFP and UNHCR humanitarian programmes. Drawing on four case studies from joint UNHCR-WFP targeting and prioritization approaches, the paper shows how integrating both qualitative and quantitative methods enhances targeting accuracy, fosters community engagement and acceptance, and mitigates errors. Furthermore, it addresses the operational challenges and programme implications of using mixed methods in diverse contexts, providing valuable insights for practitioners involved in humanitarian response.

## INTRODUCTION

Since 2020, the UNHCR-WFP Joint Programme Excellence and Targeting Hub (Joint Hub) has supported the roll-out of the UNHCR-WFP Joint Guidance for Targeting of Assistance to Meet Basic Needs<sup>1</sup>, assisting thirteen country operations to date in developing new, or revising existing, joint targeting and prioritization approaches for basic needs assistance in the context of forced displacement. This experience has demonstrated that combining different targeting methodologies effectively mitigates the risks of applying a single targeting method, while providing a tailored approach to specific and evolving operational contexts.

Devereux et al. (2017, p. 196)<sup>2</sup> emphasize that no single targeting method works best across all contexts, as each methodology has its own strengths

and limitations. This highlights the importance of carefully considering and selecting the most appropriate approach for each context, potentially integrating multiple methods where needed. Applying mixed methods can enhance accuracy, promote transparency, and foster community participation, thereby reinforcing the strengths and mitigating the weaknesses of individual targeting methods.

For the purposes of this paper, mixed method approaches refer to the use of a combination of targeting methods<sup>3</sup> (e.g. qualitative, quantitative, data-driven, or community-based) instead of a single method, when defining joint targeting and prioritization approaches. The table below outlines key targeting methods commonly used in humanitarian assistance.

1 UNHCR-WFP Joint Guidance for Targeting of Assistance to Meet Basic Needs <https://www.unhcr.org/media/joint-guidance-targeting-assistance-meet-basic-needs>  
2 The targeting effectiveness of social transfers <http://dx.doi.org/10.1080/19439342.2017.1305981>  
3 All targeting methods available can be found from page 32 of the following guidance [docs.wfp.org/api/documents/WFP-0000113729/download/](https://docs.wfp.org/api/documents/WFP-0000113729/download/)

## TARGETING METHODS

<b>Categorical</b>	Beneficiaries are selected based on predefined criteria or categories
<b>Scorecard</b>	Beneficiaries are scored based on specific indicators and weighted criteria
<b>Proxy Means Tests (PMT)</b>	Beneficiaries are ranked based on a statistical model that estimates income and economic vulnerability using proxy indicators
<b>Community based</b>	Community leaders and/or members define or validate eligibility criteria and identify those eligible for assistance
<b>Self-targeting</b>	Individuals apply for assistance if they consider themselves in need and meet predefined eligibility criteria.
<b>Geographical</b>	Beneficiaries are selected based on their geographical location
<b>Status based</b>	Beneficiaries are selected based on their status (e.g., refugees, IDPs, etc.).

**Drawing from the experience of the Joint Hub in designing targeting and/or prioritization approaches in Mauritania, Niger, Rwanda, and South Sudan, this paper highlights four key lessons.**



# Lesson One

## Data availability and quality determine the most effective targeting method(s)

**The choice of targeting method/s is highly dependent on the availability and quality of data from multiple sources.** Assessment data provides essential insights into the needs and eligibility criteria of any population while UNHCR's Profile Global Registration System (ProGres) provides socio-demographic information on all registered displaced populations within a specific context. Where available, ProGres can serve as the foundation for targeting methods such as categorical targeting and Proxy Means Testing (PMT). However, the quality of ProGres data can vary considerably between countries, and outdated data may lead to inaccuracies in the selection of eligible households or individuals. On the assessment side, data are often unavailable, outdated, or insufficient to inform an effective targeting approach.

Over the past five years, with support from the Joint Hub, joint UNHCR-WFP qualitative and quantitative assessments have enhanced targeting strategies by providing high-quality data. These assessments established rigorous data collection processes, optimized resource use and increased community participation and buy-in. Joint assessments have also helped streamline field monitoring, reduced duplications, and enhanced organizational efficiency allowing for cross-validation of findings, filling gaps where one method alone would be insufficient, and ensuring a more comprehensive understanding of needs.

For example, in **South Sudan** refugees are dispersed across various locations, primarily

in refugee camps such as Ajuong Thok, Batil, Doro, Gendrassa, Kaya, Pamir, Makpandu, and Gorom, each with its own unique context and livelihood opportunities. Until 2022, assistance to refugees was based on their status, largely due to the lack of detailed information on their needs and opportunities at camp level. In January 2023, UNHCR and WFP expanded existing WFP monitoring activities by conducting Joint Post-Distribution Monitoring in eight camps to collect information on refugees' needs and capacities.

The results of this exercise enabled a tailored geographical targeting approach, designed to address the specific vulnerabilities of each camp. It determined both the type and duration of assistance while also considering seasonal factors. In the identified camps, additional support was allocated to the most vulnerable households – approximately 92,404 refugees and asylum seekers – based on a combination of statistical analysis, community consultations, and available resources. The ProGres database played a crucial role in estimating the resources required to meet refugee needs and in generating targeted distribution lists to ensure effective assistance.<sup>4</sup>

**Targeting methods used in South Sudan: geographical, categorical and community consultations to validate the targeting approach and the eligibility criteria.**

4 More details on the assessment conduct in South Sudan are available in this link [UNHCR/WFP Joint Post Distribution Monitoring](#).

# Lesson Two

## Using Mixed Methods Helps Minimize Errors

**Combining targeting methods is an effective strategy to reduce errors that are intrinsic to any single approach.** As Devereux (2020)<sup>5</sup> observes, targeting a programme, by limiting access to certain individuals, inherently raises the issue of targeting errors. Both inclusion and exclusion errors are inherent in the design and implementation of any targeting approach. Geographical targeting, for instance, often results in higher inclusion errors by covering all individuals within a specific area, while data-driven methods, such as Proxy Means Testing (PMT), can lead to significant exclusion errors through the combination of specific characteristics. This may exclude certain vulnerable individuals or groups who may not fit the specific combination of characteristics, even though they are in need.

The existing literature on targeting methods highlights that combining targeting methods can mitigate these challenges. This was corroborated by the Joint Hub's experience in **Rwanda** in 2020, where UNHCR and WFP implemented a joint targeting approach for refugees in six camps. This approach integrated geographical targeting with categorical criteria and was validated through community consultations. To qualify for food

assistance, refugees had to meet specific categorical eligibility criteria, based on socio-demographic and protection-related factors derived from assessments and community feedback. An appeals process was also established, allowing refugees to contest targeting decisions.<sup>6</sup>

By combining categorical criteria with geographical targeting, the approach enabled assistance to be distributed according to the varying levels of household vulnerability within the camps, which the geographical method alone could not achieve. Additionally, the inclusion of protection-based eligibility criteria helped minimize exclusion errors by reaching households that the demographic criteria alone might have overlooked. Community consultations and country office expert insights were also crucial in shaping a more inclusive, context-sensitive targeting approach. Although the strategy somewhat increased inclusion errors, this was considered an acceptable trade-off, as it improved refugee acceptance of the targeting approach and eligibility criteria, ultimately enhancing the overall effectiveness of the operation.<sup>7</sup>

**Targeting methods used in Rwanda: geographical, categorical and qualitative including community consultations to validate the targeting approach and the eligibility criteria.**

5 Handbook on Social Protection Systems, Chapter VIII Targeting <https://doi.org/10.4337/9781839109119.00027>

6 More information on the appeal system in Rwanda are available at this link [docs.wfp.org/api/documents/WFP-0000163182/download/](https://docs.wfp.org/api/documents/WFP-0000163182/download/)

7 More details on the targeting approach in Rwanda can be found at this link [RWD\\_targeting-2-pager.pdf](https://www.wfp.org/publications/rwd-targeting-2-pager-pdf)

# Lesson Three

## Community engagement is key

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### **Engagement with the community is a crucial step in the targeting and prioritization process.**

As part of a mixed-method approach, community engagement is valuable whether it is considered as a targeting method in itself or as part of the process of evaluating or endorsing eligibility criteria for other methods, such as categorical targeting. Incorporating the views of a diverse range of forcibly displaced people and host communities is not only essential for gaining their acceptance and buy-in for the targeting approach, but also for improving decision-making. Their input ensures that the approach is more responsive to the actual needs and priorities of those it aims to support. Engaging communities from the early stages of the targeting process is particularly effective, as it helps in identifying potential risks, including protection concerns and social cohesion challenges.

Community members can contribute with valuable insights to refine eligibility criteria and minimise targeting errors by identifying vulnerable households that may be difficult to pinpoint using only quantitative data. They can also contribute to the design of stronger joint communication strategies, particularly by identifying preferred communication channels, which is crucial for ensuring that messages reach the intended audience.

Accessible, inclusive, and responsive feedback mechanisms, which also allow for the management of appeals, can further improve assistance delivery

and community participation and contribute to a more accurate and accepted needs-based targeting and prioritization process. Communicating the targeting approach to communities early in the process helps foster understanding, support and acceptance.

In 2022 in **Niger**, community engagement played a crucial role in the targeting process, taking place in two phases. First, communities validated the eligibility criteria developed by UNHCR and WFP, based on a joint needs assessment covering refugees, internally displaced persons (IDPs), and host communities. Amid large-scale displacement and prolonged conflict, these eligibility criteria aimed to establish a consistent, widely accepted, needs-based methodology across all three groups.

Once validated, community committees in each village took responsibility for identifying the eligible households by organizing assemblies where villagers collectively determined the most vulnerable. This approach built on the country offices' previous experience with community-based targeting while introducing a unified methodology for refugees, IDPs and host communities, even in the absence of a consolidated registry for all groups. By combining quantitative and qualitative methods, the targeting design was strengthened, ensuring coherence, and reducing duplication of efforts.

**Targeting methods used in Niger: geographical, categorical and community-based targeting focusing on community engagement to validate the targeting approach and eligibility criteria, and to select eligible households.**

# Lesson Four

## Targeting must be continuous

### **Targeting should not be seen as a one-off exercise but rather as an integral part of the programme cycle, requiring regular updates.**

By making targeting an ongoing process, humanitarian assistance can be more adaptive and effective. Regular updates, efficient appeals processes and a strong governance body will ensure that assistance reaches those who need it most, while optimizing resource allocation and maintaining community support.

The use of a mixed-method approach can provide the flexibility needed to adapt different parts of the targeting approach when revising ongoing implementation, allowing for adjustments based on evolving needs, available resources, and operational capacities. By integrating different targeting methods, various aspects of the approach can be modified as necessary. For example, the categorical criteria used to identify beneficiaries can be refined based on updated vulnerability assessments or community feedback. Similarly, geographic coverage can be expanded or reduced in response to changing humanitarian conditions, such as sudden population displacement, shifts in food security levels, or logistical constraints.

In **Mauritania**, WFP and UNHCR developed a comprehensive targeting approach that integrated mixed methods to facilitate the inclusion of the most vulnerable refugees in the national social safety net. In partnership with the Government's Social

Registry, a socio-economic census of all refugees was conducted in 2021 to analyze their capacity to meet their basic needs. Based on the findings, refugees were categorized into three vulnerability groups to enable targeted assistance from the government, WFP, and UNHCR.

Quantitative data was used to develop a scorecard, prioritizing the most vulnerable refugees for enrollment in the Social Registry and ensuring they received a higher level of humanitarian assistance. This process was further enhanced by community consultations with refugees, ensuring their perspectives were integrated into the final targeting strategy. To promote inclusivity and transparency, a governance body and an appeal process were established, allowing refugees to challenge targeting decisions.

The governance structure not only guided the initial delivery of food and cash assistance in January 2022 but also provided a framework for continuous adaptation. This included the assessment of refugees who had not been evaluated previously and allowed for the inclusion of new arrivals into the system in 2023. However, challenges remain, particularly with the high number of new arrivals and the need for regular updates to assistance lists. The Government of Mauritania, WFP and UNHCR are working on developing a process for continuous registration and targeting.<sup>8</sup>

**Targeting methods used in Mauritania: scorecard, and community engagement to validate the targeting approach and the eligibility criteria.**

8 Additional details on the targeting approach are available in this link [Support to UNHCR and WFP country operations in Mauritania - WFP-UNHCR Joint Hub](#)

## CONCLUSIONS

The lessons learned presented in this paper offer evidence that adopting mixed-method targeting approaches can result in significant improvements in the accuracy, inclusion, and acceptance of humanitarian assistance programmes. By combining quantitative and qualitative methods, WFP and UNHCR have effectively addressed common challenges such as targeting errors, gaining community buy-in, and adapting to evolving contexts and needs.

While mixed-methods approaches offer clear benefits, they also come with challenges. These methods require substantial initial investments in training, governance, and ongoing data collection. Conducting joint assessments, for instance, demands significant resources and can take up to six months to design and produce actionable data. Additionally, capacity building is essential for programme officers and field staff to effectively integrate targeting, programmatic objectives, and outcomes into their work.

Governance structures face challenges due to frequent staff turnover at the country level, which disrupts the establishment of a stable and sustainable governance body and can lead to gaps in information flow. The involvement of multiple stakeholders can lengthen the decision-making process,

requiring perseverance and effective collaboration. Furthermore, timing and programmatic implications must be carefully considered to ensure that targeting remains responsive to immediate needs while also aligning with long-term objectives.

A robust targeting governance framework, with transparent, accessible and well-resourced appeal processes available throughout the targeting implementation, is essential for minimizing risks and building trust with affected communities. Future efforts should focus on refining mixed-method targeting approaches to better integrate protection and accountability, while strengthening the capacity of national and local teams to adapt and apply these methods effectively.

Drawing from experiences in various country contexts, the use of mixed methods is not just an emerging good practice, but an essential strategy for addressing the complexities of modern humanitarian crises. By learning from and building upon these lessons, WFP, UNHCR, and their partners can pave the way for more equitable, impactful, and sustainable targeting and prioritization approaches. This is crucial in designing inclusive, effective programmes that meet the needs of vulnerable populations while fostering trust and accountability with affected communities.



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