Decision Calendar

A management tool for evidence-based decision making:
shifting the focus from defining the problem
to addressing the solution

Data Demand and Information Use
Part Two: Strategies and Tools

MEASURE Evaluation
www.cpc.unc.edu/measure

Decision Calendar

The Kenyan national population agency was troubled by a stall in the fertility decline and plateau in contraceptive prevalence rate after years of success in increasing family planning.

The Decision Calendar tool helped the agency see the need for secondary analysis of the Demographic and Health Survey dataset. This analysis revealed how program modifications would deliver better results—and enabled the Division of Reproductive Health to lobby successfully for additional resources.

In fact, their evidence-based advocacy was so compelling that the organization was accorded a government-funded budget line item for family planning supplies for the first time.

Scenario

Why is this tool important?
Important program and policy decisions are often made bassed on insufficient data, even when a wealth of information is available.

In areas of the world where the need is great and resources are limited, policy and program decisions must produce the best possible outcome. The urgency and expense associated with major issues such as population and disease control require more than intuition and experience. Even if the decision made by "gut feel" or personal insight is sound, the decision maker will find it difficult to lobby persuasively for the resources to implement it.

Both needs—the need to make optimal decisions and to have a compelling case for advocacy—call for proof with facts. Yet fully evidence-based decision making has been rare, for any or all of the following reasons:

❐ In many cases, a wealth of data resources are available, due to significant increases in data-gathering through national and local surveys and routine data collection efforts, but **research reports are sitting on a shelf** and are not being used to drive evidence-based decisions.

❐ **Existing data resources are inadequate** for decision making, perhaps because research processes did not consider how data might be used later, or decision makers do not have confidence in the data.

❐ Critical policy/program decisions need to be made, and **there is not enough information** to support the best decisions or to advocate persuasively for the required resources.

The Decision Calendar is a tool to resolve these mismatches. It aligns data resources with the decisions they would support, and vice versa. The tool helps program managers appreciate the need for good supporting data, helps data managers visualize how their work can be applied, and helps all stakeholders prioritize decisions and data-collection activities.

Description

What does this tool do?
Supports evidence-based decision making by creating and strengthening links between information and decision-making processes.

The Decision Calendar is a management tool—a combination of template and process—that serves three key purposes:

❏ **Encourage greater use of information in decision making—**Identifies and documents key policy/program decisions that must be made, and from that understanding, identifies the information needed to support those decisions.

For example, a national AIDS program has just initiated a multi-sectoral HIV/AIDS program and leaders have major decisions to make about program design, management and priority-setting.

❏ **Encourage better use of existing information—**Identifies existing data resources and uncovers new ways to use that information to support evidence-based decision making.

For example, a research group mandated to evaluate the effectiveness of a national family planning program has completed the report and is now interested in ensuring that this information is used to improve programs and influence family planning policies.

❏ **Monitor the use of information in decision making—**Provides a timeline for monitoring progress in the decision-making process, and a systematic way of identifying data use by program managers, donors, and consultants.

The Decision Calendar can be developed and applied at the international, regional, national or local level. The tool acknowledges that decision-making processes and stakeholders will vary in different arenas—political, programmatic, or policy—and accommodates them individually.

The Decision Calendar is a working document that should be extended and revised as a program develops and changes.

Audience

Who should use this tool?
Anyone involved in collecting, analyzing, reporting and using health information.

The tool has four principal sets of users:

(1) MEASURE Evaluation representatives or other technical support consultants/facilitators:

❏ Provide the Decision Calendar template.

❏ Establish relationships with host-country contributors.

❏ Facilitate and mentor host-country staff as they complete the template.

❑   Provide technical assistance in obtaining and interpreting information.

❑   Monitor the results gained from using the template.

(2) Host-country decision makers, such as program managers and other key stakeholders:

❑   Participate in the creation of their unique Decision Calendar.

❑   Use the Decision Calendar to identify and address data gaps.

❑   Incorporate the Decision Calendar into decision-making processes.

(3) Data specialists, such as monitoring and evaluation (M&E) specialists:

❑   Contribute their knowledge of data resources to the Decision Calendar.

❑   Identify ways their existing quality data can be integrated into decision-making processes, creating "retrospective demand" for their data.

❑   Identify ways to resolve any data gaps, such as data cleansing, reformatting, secondary analysis or new data collection activities.

(4) A designated manager for the Decision Calendar program:

❑   Selects the stakeholders to create and implement the Decision Calendar.

❑   Ensures appropriate representation and authority on the team—individuals who can champion decisions in their areas of influence.

❑   Monitors the development, use, and updating of the Decision Calendar.

Timing

> **When would this tool be used?**
> *For best results, the Decision Calendar would be in place and routinely updated.*

Completing the Decision Calendar should not be a one-time exercise tied to one specific calendar date or decision point. Ideally, it should be a working tool, integrated into annual work plans and regularly referenced, monitored, and updated.

However, several conditions may trigger the initial creation of a Decision Calendar or an update to an existing calendar:

There is a specific, identified decision to be made. For instance, an external agency might be working to develop national strategic plans for HIV/AIDS programs for a region. Knowing that targeted decisions will be made to formulate these plans, this is a prime opportunity to engage stakeholders in creating a Decision Calendar.

Stakeholders need more evidence-based decisions. Evidence-based decisions can improve outcomes and help stakeholders lobby for needed resources. If a group of stakeholders that has these objectives is known, the timing could be right for engaging them to create a Decision Calendar that aligns with their annual work plan.

Existing information is underutilized. M&E specialists or other data managers might wish to see greater use of existing data resources they have created. A Decision Calendar can help link them with decision makers who could benefit from their work.

A new data collection activity is being planned. The Decision Calendar ensures that the planned research activity will produce information that is relevant to decisions that must be made.

Applications

Who has already used this tool?
Representative field applications in Africa and the Caribbean

Kenya – August 2005
National Coordinating Agency for Population Development (NCAPD)
Analysis of Factors Affecting Fertility and Contraceptive Use
MEASURE Evaluation helped the NCAPD develop a Decision Calendar that identified opportunities to use secondary analysis of fertility data to support evidence-based decisions about contraceptive planning. This analysis enabled the agency to:

- ❏ Demonstrate the need for additional resources.
- ❏ Gain a new government-funded budget line item for family planning supplies.
- ❏ Raise the priority of the national family planning program.
- ❏ Increase participation in national planning for reproductive health services.

Dominica, St. Lucia and St. Vincent – June-August 2005
National AIDS Program
MEASURE Evaluation facilitated development of a Decision Calendar to guide the information systems for an expanded response to HIV/AIDS. The Decision Calendar encouraged all participants to think more strategically about data collection efforts—and, in turn, to focus research activities on getting targeted information to support program and policy decisions.

About this document

What is in this tool guide?
Decision Calendar description, blank template, approach and process

This document contains descriptions of:

- ❏ The purpose, audience and typical applications for this tool.
- ❏ Guiding principles of the Decision Calendar methodology.
- ❏ The structure of the Decision Calendar template.
- ❏ A systematic process for creating a Decision Calendar.
- ❏ A checklist to use in implementing the process.

Guiding principles

The Decision Calendar approach
Issues and considerations for using this tool

Host-country representatives must have ownership.
If the Decision Calendar is to serve as an ongoing management tool, it must reflect the perspectives, needs, and interests of the people who will actually be using it. One of the first process steps is to secure input and buy-in from the host-country stakeholders who will ultimately be the owners of this tool. The identified program manager should be someone who will champion the Decision Calendar methodology as an ongoing endeavor.

This is a collaborative and iterative process.
Collaborative. The Decision Calendar can be applied or developed directly by a program manager or the staff of an organization. However, an external consultant (such as a MEASURE Evaluation representative) can be of great assistance as a facilitator in drafting the original calendar.

Iterative. The process usually entails a group meeting with key stakeholders to brainstorm the decisions and data requirements. However, it is common at this time to identify other potential contributors and reviewers, so you should expect this to be an iterative process, with additional modifications to the Decision Calendar.

A successful Decision Calendar draws on multiple resources.
Reference materials include, but are not limited to the following:

❐   Strategic plan for the targeted program or organization.

❐   M&E plan or results framework for the target program or organization.

❐   M&E operational plan.

❐   Assessments of M&E systems and/or information use.

❐   Specific data sources, such as Demographic and Health Surveys (DHS), Priorities for Local AIDS Control Efforts (PLACE), HIV/AIDS Service Provision Assessments (HSPA), special study or evaluation.

In some cases all of these documents will be available. In other cases, no documentation will be available, and the facilitator or in-country counterparts will conduct interviews with various stakeholders.

The Decision Calendar template is flexible, adaptable and extensible.
Flexible. The template presented in this document was developed from extensive experience with health care and population planning issues in Africa and the Caribbean. However, the tool reflects best practices that are applicable to a broader realm of issues and environments. It should always be kept in mind that the tool is flexible enough to be modified to fit specific situations as necessary.

Adaptable. Users can adapt the specifics of the template—the categories and columns, for instance—to suit their unique needs. For example, a column that defines the arena in which the decision is made,

such as an ad hoc or regularly scheduled meeting might be added. Or, the Required Information column might be split to include a Format field that specifies whether the information should be in the form of a PowerPoint presentation, email with bullet points, Excel worksheet, etc.

Extensible. The Decision Calendar should be a working document that is extended and revised as a program develops or changes.

The Decision Calendar was designed to encourage a systematic process that links decisions and data. Within that objective, the specific appearance of the template—and the time span it addresses—can be adapted to the specific needs of the tool's owners/users.

There are two different ways to use this tool.
In some cases, the tool will be used to help data specialists identify useful applications for their data. In other cases, the tool will help decision makers identify the data requirements of their upcoming decisions. The template serves both perspectives, but the process steps naturally will be somewhat different.

Program managers and decision-makers would probably follow these steps:

1. Identify key decisions that need to be made.
2. Determine the key stakeholders in these decisions.
3. Document the data sources required to make these decisions.
4. Clarify next steps to get or use the needed data sources.

M&E specialists or other data researchers would likely take these steps:

1. Review available data resources.
2. Conduct subsequent analysis as needed.
3. Identify key findings of that analysis.
4. Identify key decisions that could be influenced by these findings.
5. Present these insights to appropriate stakeholders.

Process steps will not necessarily be sequential.
The Process Action Plan presented in this document outlines a logical sequence of steps, from project initiation to post-project review. However, it would be typical for some steps to take place simultaneously or out of sequence. Therefore, this Process Action Plan should be considered a guiding framework and not a strict prescription.

The Decision Calendar template

Presenting the global template

For decision-driven data planning

This section presents a blank version of the Decision Calendar template. The next section describes the type of content to be included in each category and field. You will see two versions of the template:

❐   Version 1—An at-a-glance overview for all decisions in a given period.

❐   Version 2—A detailed worksheet for each of three decision categories.

Stakeholders can determine which version of the template works best for their needs and what time period they want to include at this point. They might choose to use summary and detailed versions together.

Decision Calendar template – Version 1 (Summary view)

Decision Calendar title	
Agency/Program	
Program manager	
Facilitator	
Time period for decision making	

Part A. Policy, planning and advocacy decisions

Decision	Frequency	Decision maker and other stakeholders	Required information	Next steps	Timeline

Part B. Program design and improvement decisions

Decision	Frequency	Decision maker and other stakeholders	Required information	Next steps	Timeline

Part C. Program management and operations decisions

Decision	Frequency	Decision maker and other stakeholders	Required information	Next steps	Timeline

Decision Calendar template – Version 2 (Category view)

Decision Calendar title	
Agency/Program	
Program manager	
Facilitator	
Time period for decision making	

Part A: Policy, planning and advocacy decisions	
Decision:	
Frequency:	
Stakeholders:	
Required information:	
Next steps:	**Timeline:**

Decision Calendar template – Version 2 (Category view continued, section 2 of 3)

Part B: Program design and improvement decisions	
Decision:	
Frequency:	
Stakeholders:	
Required information:	

Next steps:	Timeline:

Continued - Part C, Program management and operation decisions, on next page

Decision Calendar template – Version 2 (Category view continued, section 3 of 3)

Part C: Program management and operations decisions
Decision:
Frequency:
Stakeholders:
Required information:

Next steps:	Timeline:

End of Decision Calendar template, version 2 (detailed view by category).

Categories and fields in the Decision Calendar template

How to create a Decision Calendar
Desired content for each area of the template

Both the summary and detailed category versions of the Decision Calendar template are divided into three primary categories and six columns or fields. This section describes the type of content that goes into each area of the template.

The three categories of the Decision Calendar

The Decision Calendar groups decisions into three categories, because the environments, stakeholders, and decision-making processes are unique for each of these categories:

- ❐ Policy, planning, and advocacy decisions.
- ❐ Program design and improvement decisions.
- ❐ Program management and operations decisions.

Policy, planning and advocacy decisions typically follow an established process for formalization and approval. This category would include national, sector-wide, and resource allocation decisions, such as:

- ❐ Developing an HIV/AIDS national strategy document.
- ❐ Formulating HIV/AIDS workplace policy.
- ❐ Defining a family planning counseling protocol.
- ❐ Allocating national funds to a health information unit.

Program improvement and design decisions can address many aspects of a program life cycle, from initial design to improvement, scale-up, sustainability, and possibly close-out. Sample decisions in this category could relate to:

- ❐ Improving procurement strategies for drugs or other commodities.
- ❐ Enhancing the effectiveness of family planning counseling.
- ❐ Designing a program to prevent mother-to-child transmission of HIV/AIDS.

In adapting this template, decisions about detailed program areas might be categorized further, with a lead stakeholder identified for each. For example, within a multi-sector approach to HIV/AIDS, decisions might be grouped into the following sub-categories:

- ❐ Voluntary counseling and testing (VCT).
- ❐ Behavioral change and communication.
- ❐ Prevention of mother-to-child transmission of HIV/AIDS.
- ❐ HIV/AIDS in the workplace

Because of the dynamic nature of programs, this section of the Decision Calendar should be updated often.

Program management and operations decisions relate to the administrative, financial and logistical factors that affect the success of a program, such as:

❒ Number of staff to support program monitoring.

❒ Reporting mechanisms.

❒ Allocation of national program funds to districts or local implementers.

In practice, categories often are interrelated and decisions in separate categories can at times overlap. For example, decisions based on the cost-effectiveness of a specific program may be included in either this category or the previous one (Program design and improvement), since stakeholders will need to draw upon both financial and program-related data.

The columns/fields of the Decision Calendar template

This section describes the type of content that would be included in the six key fields or columns of the Decision Calendar.

Decision describes either the known decision that must be made, or the decision that could potentially benefit from known data resources.

Frequency describes whether the decision is routine or non-routine.
Routine decisions are those made on a daily, weekly, monthly, quarterly or annual basis, such as:

❒ Allocating funds to a national hospital (annual).

❒ Determining the number of family planning counselors to be trained and where they will be deployed (annual).

❒ Allocating anti-retroviral (ARV) drugs to regional drug stores (quarterly).

Non-routine decisions are made on an occasional or ad hoc basis, and may be one-time decisions, such as:

❒ Determining functions and authority by the type of provider administering anti-retroviral drugs (to be included in a national HIV/AIDS care and treatment protocol).

❒ Developing public service announcements to reduce partner disapproval of family planning through male involvement strategies.

❒ Disbursing donated family planning commodities to VCT sites.

This distinction is important because actions will differ for routine decisions, for which decision-making processes and timelines are well-established, or non-routine decisions, for which new communication channels, connections, or timelines may need to be defined.

Decision makers and other stakeholders include individuals and groups that will be involved in making the decision. "Decision maker" would be the primary individual (name or title) who has ultimate authority for the decision. "Other stakeholders" would include other individuals or groups involved in advocating for or implementing the decision.

This field might include such stakeholders as the following:

❒ National AIDS program coordinator

❒ Prime Minister

❒ Minister of Finance

❒ Program director

❒ Chief Medical Officer

Required information identifies either the data resources that would be required to support the decision or the existing data resources for which a field application is sought.

This field should include the data source, status of this data source, and quality of the data available. All information should be as specific as possible. An entry could be quite explicit, such as "The number of pregnant women who have been tested in the last six months." An entry could also name a specific report, or a subset or range of data elements from a named report, or a data resource that does not yet exist.

For existing data sources, some indication of the degree to which stakeholders have confidence in the data should be included. Even if this is a subjective impression of data quality, it will indicate their willingness to accept that data as a foundation for decision making.

Below are some sample entries for Required Information field:

❒ Service statistics for ante-natal care (ANC)

❒ National budget for ARV drugs

❒ National Demographic and Health Survey (DHS)

❒ Sentinel Surveillance Data for tuberculosis (TB)

❒ GPS coordinates for voluntary counseling and testing sites

Next Steps outlines an action for resolving a data gap or integrating data into decision-making processes. These should be straightforward, action-oriented statements; for example:

❒ Collect the available data and present it at the biannual planning meeting.

❒ Aggregate from laboratory records to find out how many people have been tested for HIV/AIDS in the last six months.

❒ Prepare a brief with key recommendations for scale-up of immunization services.

❒ Interpret trends on family planning uptake over the last five years.

❒ Present key findings and recommendations to stakeholders.

Timeline presents a concrete, actionable timeframe for the Next Step, so progress can be objectively monitored against the original plan.

Sample Decision Calendar – Version 1 (Summary View)

Excerpts from a typical Decision Calendar

Decision Calendar title	Kenya: Analysis of factors affecting fertility and contraceptive use
Agency/Program	National Coordinating Agency for Population and Development
Program manager	Executive Director
Facilitator	Deputy Director for Policy and Programs
Time period for decision-making	Fiscal Year 2005-2006

Part A. Policy, planning and advocacy decisions

Decision	Frequency	Decision maker and other stakeholders	Required information	Next steps	Timeline
Incorporate demand creation for family planning in the new Reproductive Health Policy	One time	Permanent Secretary, Ministry of Health Family planning non-governmental organizations (NGOs) and donor agencies	Analysis of Information, Education and Communication (IEC) trends from the Demographic and Health Surveys (DHS) Revised IEC and Advocacy Strategy	Review draft Reproductive Health Policy and identify places to insert recommend-ations for demand creation.	Review policy draft August-November 2005 Publish final Reproductive Health Policy in February 2006

Part B. Program design and improvement decisions

Decision	Frequency	Decision maker and other stakeholders	Required information	Next steps	Timeline
Convene conference to review community-based distribution (CBD) strategies for Kenya	One time	Division of Reproductive Health, Ministry of Health Family planning NGOs and development partners	Analysis of CBD trends from the DHS surveys Inventory of current CBD programs Studies on cost and benefits of CBD programs	Prepare a concept paper for the conference. Mobilize resource to hold the conference.	Complete concept paper January 2006 Convene conference October 2006

Part C. Program management and operations decisions					
Decision	Frequency	Decision maker and other stakeholders	Required information	Next steps	Timeline
Finalize agreement with development partner on the Population Education and Advocacy Project	One time (on contract renewal, every three years)	Development partner: Japan International Cooperation Agency (JICA) Division of Reproductive Health, Ministry of Health Family planning NGOs Kenya Institute of Mass Communications	Analysis of IEC trends Revised IEC and Advocacy Strategy	Prepare detailed project agreement and implementation plan. Finalize negotiations with JICA.	Negotiations from August-December 2005 Signed agreement in December 2005

Process Action Plan

Using the Decision Calendar tool
Steps to the plan.

Step 1. Identify the need.

1.1   Identify a potential opportunity.
Communicate with host-country counterparts to identify opportunities for implementing a Decision Calendar. Sometimes the opportunity becomes clear when MEASURE Evaluation is asked to develop an M&E framework or plan. The logical first step to this task would be to ask not what the requesting group needs to report, but rather what kinds of decisions need to be made—and this is where a Decision Calendar can be invaluable.

1.2   Determine how the Decision Calendar would be used for this need.
Will it be used to increase the use of an existing data source and link it to decisions that could benefit, or will it be used to help a group or project team be strategic in identifying the information they need to support evidence-based decisions? The perspective will influence certain aspects of this process, such as which stakeholders lead the agenda in the Decision Calendar workshop and what types of actions are recommended in the calendar.

Step 2.   Create an internal plan for responding to the need.

2.1   Coordinate with key development partners.
Contact your U.S.-based and in-country colleagues to determine an achievable timeline for providing this technical assistance (given available resources), as well as an appropriate protocol for contacting in-country stakeholders.

2.2   **Draft the internal action plan/proposal.**
This document would describe:

❏   The need identified in Step 1.

❏   How your organization will provide technical support to address that need.

❏   How this activity fits into your organization's priorities and workload.

❏   The preliminary list of stakeholders and how they will be engaged.

❏   A high-level outline of process steps.

2.3   **Review this plan** with the your U.S.-based and in-country colleagues, and incorporate their feedback.

2.4   **Obtain approval** from necessary counterparts, according to your organization's protocol, to proceed with the Decision Calendar technical support activity.

Step 3. Engage project stakeholders.

Good relationships and buy-in are essential, because the success of the Decision Calendar rests on several issues that stakeholders either control or know better than anyone, such as:

❏   How committed are they to implementing, tracking, and updating the Decision Calendar?

❏   How confident are they about using given data sources to support decisions?

❏   What expertise, resources, and decision-making forums are available?

❏   What behind-the-scenes factors will influence project success?

Stakeholders might have been previously identified through a formalized process, such as a stakeholder analysis, or informally through communication with an in-country counterpart.

3.1   **Contact the lead stakeholder.**
In-country counterparts and colleagues can identify the best way to initiate contact (and the most likely person to be a champion for the Decision Calendar) and make introductions for you. If you are not planning to be in-country for another reason, this initial contact can be made by remote communication—phone or email. Facilitators generally travel on-site when the actual work of completing the Decision Calendar template begins.

3.2   **Determine the complete context for the Decision Calendar activity.**
Working with the lead stakeholder, determine the total environment in which the Decision Calendar will be used. What are their pressures, available resources and priorities? For example, the stakeholder might be under pressure from a donor agency to scale up a specific program, so there will naturally be more focus on that program.

3.3   **Determine the role and participation level for each stakeholder.**
This list should include representation both from program managers and data specialists. Here are some questions you might ask during this initial discussion:

❏   In addition to this list, who else needs to be involved in this process?

❏ What is each person's role in this process—their current and expected participation? Some stakeholders, such as the Minister of Health, will have a vested interest in the Decision Calendar activity but will have limited involvement in actually creating it.

❏ What resources and expertise does each one bring to the process, in terms of time available, support staff, external funding, or other resources?

❏ What external pressures, projects, or funding issues will also be influencing factors?

Step 4. Plan the approach for implementing the Decision Calendar.

4.1   **Determine the most appropriate forum for drafting the Decision Calendar.**
In most cases, this will be a formal workshop with all key stakeholders. To save contributors' time, the Decision Calendar workshop can be held when the group would be together anyway, such as during an M&E workshop.

In rare cases, the Decision Calendar will be drafted in one-on-one sessions with one influential stakeholder—a very high-level person or one with sole responsibility for a decision. The results will later be disseminated for review. This option is less desirable than a group workshop, but it may be the best option when other stakeholders are unavailable or have not yet been hired.

4.2   **Define roles and responsibilities for implementing the Decision Calendar.**
Who will be project lead? What are the responsibilities of various contributors?

4.3   **Establish an agenda for the forum.**
If the Decision Calendar is being used to help decision makers think strategically about their data requirements, the agenda should open with lead decision makers. If the Decision Calendar is being used to promote greater use of existing data in the decision making process, M&E and data specialists should present earlier.

4.4   **Define the timeline for major milestones.**
When will the workshop or meetings to draft the Decision Calendar take place? When will a final draft of the Decision Calendar be available? When will there be follow-up to assess decisions and verify that they have incorporated the identified information? On what schedule or under what conditions will the Decision Calendar be updated or extended?

Step 5. Facilitate the creation of the Decision Calendar by host country counterparts.

5.1   **Hold the forum to draft the Decision Calendar.**
For purposes of this Action Plan, we will assume that the forum is a formal workshop with 10 to 15 stakeholders/contributors. This will be an in-person workshop at a site convenient to the majority of attendees, held in a room that is conducive to brainstorming in small groups as well as open group work, with flip charts or a board.

5.2   **Facilitate a brainstorming session to identify key decisions to be made.**
In the past, it has proven overwhelming to expect the group to brainstorm *all* the decisions, data requirements and recommendations on one large wall chart or blackboard. Below is a high-level view of an approach that has proven effective, even for large and diverse groups:

❒ **Organize the group into sub-groups** based on their strategic objectives and areas of interest. For instance, you might group all the people who are working on ART programs, or those associated with HIV/AIDS policy.

❒ **Have each group write up their key decisions** on flip chart paper. You can prompt them with open-ended questions, such as, "Which decisions do you have to make for policy? For programs? For day-to-day operations? Which decisions do you make daily? Monthly? Quarterly?"

❒ **Have a co-facilitator describe the three key categories** of the Decision Calendar: policy, planning and advocacy decisions; program design and improvement decisions; and program management and operations decisions.

❒ **Cut the flip chart paper into pieces**, one decision per piece of paper, and return them to the small group that wrote them.

❒ **Have participants assign each decision to a category** and justify their choice. This process promotes strategic thinking about how various decisions would be made and what information would support those decisions.

❒ **Paste the decisions onto the wall under the appropriate category**. From here, patterns, overlaps, or redundancies may emerge, which helps in the following steps.

5.3   **Identify the data requirements for these decisions.**
Ideally, a data specialist would give an overview presentation about existing data sources. However, there is not always time for this step. It may be necessary to solicit this information before the forum and present it in a handout, PowerPoint presentation, or summary flip chart.

5.4   **Connect decisions with data.**
Where there is a manageable number of decisions and data resources, it can be useful to write a list of decisions on one half of a blackboard and a list of data resources on the other half. The group can then more readily visualize the connections between these elements, while you actually draw lines connecting decisions with data sources. This step can take one or two hours.

At this stage, it will become clear where there are gaps between the information that is needed and what is available. Does the information even exist? If it does, is it good quality? Does it need secondary analysis or interpretation? Can we access it?

5.5   **Complete the remaining fields of the Decision Calendar.**
Type up the list of decisions from the blackboard or flip chart pieces, and move on to completing the remaining fields for each decision, such as next steps and timeline. If the identified issue is an inadequacy in the data, the next steps might be to:

❒ Perform data management tasks, such as aggregate data or convert formats.

❒ Reconcile issues with data quality.

❒ Engage a consultant or staff person to conduct secondary analysis.

If the issue is to strengthen links between data and decisions, next steps might be:

❐ Identify a forum for injecting data into the decision-making process (such as via direct communication, annual meetings of program implementers, community forums, etc.).

❐ Establish a format for disseminating data to decision makers (PowerPoint presentation, briefing paper, lecture, pamphlet, or Excel tables).

❐ Create a new forum, such as a human rights workshop that brings together people with an interest in HIV/AIDS—from the national secretariat to those living with the virus—to share available knowledge on the issue.

Define a timeline that enables stakeholders to objectively monitor progress on the next steps.

5.6   Prioritize the decisions and next steps.
There is typically not enough time in the workshop to perform this step, but it is important, because priorities may change as a result of this exercise. For instance, the group might have prioritized a decision for which no supporting information is yet available; that decision might drop in priority until a data-collection process takes place. This step will probably require follow-up with the lead stakeholder or activity lead.

5.7   Conduct follow-up interviews or meetings as necessary.
Invariably, the first workshop will prompt ideas, questions, or issues that cannot be addressed by those who are present. There will almost always be a need for follow-up with other individuals. Identify other potential contributors and integrate them into the process.

If the Decision Calendar is being used to promote greater use of existing data resources, Step 5 would be modified accordingly. Rather than focusing on decisions and working backward from there to determine data requirements, the participants would outline known data resources and work forward from there to identify decisions that could leverage that information.

Step 6. Build host-country capacity to use the Decision Calendar as a management tool.

6.1   Determine a management process for ongoing use of the Decision Calendar.
How will the organization manage and use the Decision Calendar from here on? How often will they reference the tool, monitor progress, update to add new items, or delete items that have been completed? You can help articulate this process and thereby ensure the continued usefulness of the Decision Calendar as a management tool and not just a one-time exercise.

6.2   Promote the integration of the Decision Calendar into annual work plans.
Encourage host-country counterparts to incorporate the Decision Calendar into the strategic annual plan for their organization, and to extend and revise the document as their programs develop or change.

6.3   Support and mentor the program manager in using the Decision Calendar.
Maintain a relationship with the program manager and provide follow-up support and mentoring as necessary to overcome any barriers or challenges. This can be informal, such as touching base with the program manager by email or when other work takes you in-country.

Step 7. Monitor and document the results of using the Decision Calendar.

An objective of MEASURE Evaluation (and the driving purpose of the Decision Calendar tool) is to promote evidence-based decision making. This objective is shared by many organizations. Furthermore, donor organizations (such as USAID, CDC and World Bank) want to know that the research they have sponsored has proven value and that the programs they have sponsored have proven results.

All of these objectives are served by monitoring the use of the Decision Calendar and documenting the successes that can be directly or indirectly attributed to its use. So it is wise to maintain a relationship with the in-country "owner" or champion of the Decision Calendar—even if it is just email correspondence—and periodically find out the following types of information:

❐   Is the organization updating the Decision Calendar on its own?

❐   How often does the organization refer to the Decision Calendar?

❐   What evidence-based decisions have benefited from the Decision Calendar?

❐   What documentation is available to substantiate the result? (This could be an email, newspaper article, press release, budget allocation, new subcommittee, etc.)

❐   What information influenced those decisions?

❐   Is there a general increase in evidence-based decision making? To what degree?

There will usually be multiple factors that weigh into any decision, but we should be able to show that data resources were present in the circle of influence. It might be unrealistic to draw a direct cause-and-effect relationship between the data and the outcome, but if the Decision Calendar methodology was active, we can at least feel confident that data resources were considered.

Checklist

For developing a Decision Calendar
Summary of the Process Action Plan.

Use the following checklist as a reference for the process steps. Note that some steps may take place simultaneously or in a different order. However, this checklist should help ensure that a systematic approach and best practices have been followed.

❐   **Step 1.   Identify the need.**

   ❐   1.1   Identify a potential opportunity.

   ❐   1.2   Determine how the Decision Calendar would be used for this need.

❐   **Step 2.   Create an internal plan for responding to the need.**

   ❐   2.1   Coordinate with U.S.-based and in-country colleagues.

   ❐   2.2   Draft the internal action plan/proposal.

   ❐   2.3   Review and refine plan with colleagues in your organization.

   ❐   2.4   Get approval to proceed with the technical support activity.

❐ **Step 3. Engage project stakeholders.**

    ❐ 3.1 Contact the lead stakeholder.

    ❐ 3.2 Determine the complete context for the Decision Calendar activity.

    ❐ 3.3 Determine the role and participation level for each stakeholder.

❐ **Step 4. Plan the approach for implementing the Decision Calendar.**

    ❐ 4.1 Determine the best forum for drafting the Decision Calendar.

    ❐ 4.2 Define roles and responsibilities for implementing the tool.

    ❐ 4.3 Establish an agenda for the forum.

    ❐ 4.4 Define the timeline for major milestones.

❐ **Step 5. Facilitate the creation of the Decision Calendar.**

    ❐ 5.1 Hold a forum to collaboratively draft the Decision Calendar.

    ❐ 5.2 Facilitate a brainstorming session to identify key decisions.

    ❐ 5.3 Identify the data requirements for these decisions.

    ❐ 5.4 Connect decisions with data, or vice versa.

    ❐ 5.5 Complete the remaining fields of the Decision Calendar.

    ❐ 5.6 Prioritize the decisions and next steps.

    ❐ 5.7 Conduct follow-up interviews or meetings as necessary.

❐ **Step 6. Build host-country capacity to use the Decision Calendar.**

    ❐ 6.1 Determine a management process for ongoing use.

    ❐ 6.2 Promote the inclusion of the calendar in annual work plans.

    ❐ 6.3 Support and mentor the program manager as needed.

❐ **Step 7. Monitor and document results of using the Decision Calendar.**

Conclusion

More effective, evidence-based decisions
Ensure that the right information is available to support optimal policy and program decisions.

In complex decision-making environments, influenced by multiple internal and external pressures, it can be extremely difficult to follow best practices for data collection and use.

Data might be collected to satisfy the reporting requirements of a donor agency, but this information might not be fully aligned with policy and program decisions that must be made. Or, host country stakeholders might not be convinced that the information should even be used in decision making in the first place, if their input was not considered in the data planning, or they are not confident of data quality.

Often, valuable data resources remain unused when they could yield better decisions that improve the effectiveness of programs and organizations, and, in turn, benefit the lives and health of more people.

The Decision Calendar was developed to meet this need, to provide a systematic approach for stakeholders to leverage data—tangible evidence of real-world conditions—into more productive and optimized decision processes.

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