

Quick Reference Handout 10.3: Supporting Data-Based Decision Making: A Checklist for PC/PBs

To support data-based decision making in your Planning Council/Planning Body (PC/PB), review the following actions and practices, and add to or refine to fit your needs. Assign and document responsibility for implementing each of them to an individual or group (such as PC/PB leadership, specific committees, support staff)—and also assign responsibility for monitoring implementation.

1. **Define and explain data-based decision making** so it is universally understood by PC/PB members, committee members, and other interested stakeholders.

Data-based decision making is decision making that is guided and supported by documented information—data—rather than based primarily or solely on personal experience, observation, anecdotes, or intuition/insight.

Data used for data-based decision making should:

- **Include both quantitative (numerical) and qualitative (non-numerical/ narrative)** information that is obtained systematically using sound methods
- **Come from multiple sources** (such as needs assessment, client-based data systems, surveillance data, program monitoring, clinical quality management (CQM) activities)
- **Be collected using multiple approaches** (such as surveys, interviews, observations, focus groups, service provider reports)

2. **In PC/PB orientation sessions include an introduction to data-based decision making** including why it is so important.
3. **Communicate that the PC/PB and staff recognize that many people, especially non-providers, will need to learn about types and use of data for planning.** Express confidence that this is an achievable task, and that everyone will be offered training and support.
4. **Make data-based decision making an expectation for all members,** and include it in the Code of Conduct, stating the responsibility of each member to both follow and help enforce this expectation.
5. **Familiarize members with their joint responsibilities as ‘advocates’ and ‘planners’,** and when each role is appropriate. Help members encourage each other to play appropriate roles.
6. **Provide specific training to clarify when individual experiences provide important input to information gathering, and when an “impassioned plea” is inappropriate.** An appropriate role play can be very effective in this effort.

7. **Provide hands-on training on how to assess data quality**, based on factors such as numbers/size of study, representativeness/sampling, wording of questions, and quality control.
8. **Use realistic activities to prepare PC/PB members for using data for decision making as they carry out essential tasks**—setting priorities, allocating or reallocating resources, developing directives, improving the system of care, identifying and addressing health disparities, and assessing the efficiency of the administrative mechanism.
9. **Provide data presentations at PC/PB meetings throughout the year**, so members are familiar with data used in priority setting and resource allocation (PSRA) before a formal data presentation is held at the beginning of that process.
10. **Have the responsible committees review draft needs assessment findings and data presentations**—then revise scope, content or method of presentation as needed.
11. **Make data reports and presentations available prior to the meetings at which they are reviewed.**
12. **Present data in plain language, using consistent, user-friendly formats**, that combine narratives with tables and charts and define necessary technical terms. Always provide an executive summary.
13. **Combine each data presentation with a mini-training session**, to familiarize members with each data type and source and how to review and use it.
14. **Provide special data training to the PLWH committee/caucus**—and preview data presentations with that group.
15. **Discuss identified data gaps**—and how they might be filled in the future.
16. **At least annually, review how well the PC/PB did at understanding and using data**—and agree on activities to improve future performance as needed.