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**Background**

In recent years, a global focus on family planning has resulted in significant strides being made toward achieving universal access to voluntary family planning and improving public health as a result. In 2011, the Ouagadougou Partnership was launched to strengthen collaboration and coordination of family planning efforts in West African countries. The following year, the London Summit on Family Planning brought together stakeholders from country governments, civil society, donors, and implementing partners to create a series of country commitments to improve access to voluntary family planning information and services by 2020, known as FP2020.

To achieve national family planning objectives aligned with Sustainable Development Goals and “Every Woman, Every Child, Every Adolescent” commitments, many countries have developed costed implementation plans (CIPs) for family planning. These operational plans allow stakeholders to work together through a shared strategic roadmap to identify required resources and accelerate progress toward FP2020 commitments. As of October 2017, 35 countries and sub-national regions have developed a CIP.

The CIP development phase includes several core components: analyzing a country’s current family planning context, identifying key issues, defining strategic results and corresponding intervention activities to achieve the results, and calculating the costs of implementing those activities. The development phase sets the foundation for the CIP’s transition into execution, a process that operationalizes the plan into sustained actions and results. To bridge the gap between CIP development and execution, four key elements must be in place: fostering country ownership; establishing and implementing a governance and coordination framework; mobilizing and managing resources; and monitoring the CIP’s performance in achieving intended results. Continuous stakeholder support is essential for CIP success.

The CIP performance dashboard applies a focused monitoring approach that allows countries to monitor a set of key results drawn from the broader set of indicators included in their CIP. These key results are aligned with the CIP map and the priority results achievement chart. Monitoring key results refines a country’s ability to assess progress in achieving CIP results, strategic goals, and commitments.
Monitoring the Performance of a Family Planning CIP

Description

The Health Policy Plus (HP+) project, funded by the U.S. Agency for International Development (USAID), with additional financial support from the United Nations Foundation, developed the CIP performance dashboard, an Excel-based data visualization tool. The tool allows users to assess progress on key results by comparing targets to key performance indicator (KPI) data within an identified performance period—most often one year. The resulting color-coded performance assessment can be used to show progress in CIP status reports.

Inputs for the CIP performance dashboard are produced by creating a CIP map and a priority results achievement chart. The CIP map outlines a country’s key results by thematic area. The priority results achievement chart specifies key performance indicators, activities, and annual targets. More information about the CIP map and the priority results achievement chart can be found in the glossary (Annex 1).

Although it is recommended that countries complete a CIP map before beginning performance monitoring, the map is not required to use the CIP performance dashboard. Countries without a CIP map can utilize the priority results achievement chart to ensure that key results, key performance indicators, and annual targets are clearly defined to use in the dashboard. Discussions surrounding inputs and outputs generated from the CIP map are a useful opportunity for governments and family planning stakeholders to build consensus around which results best capture a successfully implemented CIP.

Once the tool’s settings have been populated with the information from the CIP map and priority results achievement chart, the dashboard should be updated regularly—as frequently as every quarter. Performance data for each indicator can be entered and tracked against annual targets.

Using the dashboard, users can visualize the status of a country’s progress toward achieving family planning goals and commitments. These visualizations can also assist in identifying bottlenecks to effective implementation through two distinct features: (1) color-coded key results and (2) a performance dashboard comprised of a set of graphs that automatically update as new data is entered.

Components

The CIP performance dashboard is organized around a select group of key results categorized as beneficiaries, beneficiary-facing program processes, or foundational supportive thematic areas. Each category is further explained in Table 1.
Table 1. Categories for Key Results

<table>
<thead>
<tr>
<th>Key Result Category</th>
<th>Explanation</th>
<th>Examples</th>
</tr>
</thead>
</table>
| Beneficiaries                       | Beneficiaries are individuals the CIP targets, commonly referred to as clients | • Women of reproductive age  
• Youth and adolescents  
• Men                                                                 |
| Beneficiary-facing program processes| Program processes or thematic areas that have a direct effect on CIP beneficiaries | • Demand generation  
• Service delivery  
• Supply chain or commodity security  
• Policy and advocacy |
| Foundational supportive thematic areas| Major systems needed for effective CIP execution           | • Financing  
• Monitoring and evaluation  
• Governance and coordination |

In addition to the overarching key result categories, the CIP map status feature details the enabling bodies that drive CIP execution: the key stakeholders that contribute to CIP execution in collaboration with the government agency responsible for stewarding the CIP implementation process.

Users can reference their CIP map to enter beneficiaries, beneficiary-facing program processes, and foundational supportive thematic areas. The priority results achievement chart can also be used to enter results, KPIs, annual targets, and activities that allow for customization of the dashboard. The tool will display a “traffic light” performance indicator color of green, yellow, or red for each result that will also be displayed in the CIP map status feature.

Software

The dashboard was developed in Microsoft Excel due to ease of use, sharing, and adaptation to specific country context. The tool has been automated so that tables are populated based on information entered in columns and rows with headings that are clearly labeled. To promote accurate data entry, green cells indicate areas where a user must enter data; yellow cells are recommended, optional fields; and white cells are locked so that required data is not overwritten. (White cells will automatically populate based on data entered in green and yellow cells.) Adding or deleting columns or rows is discouraged as this may alter embedded formulas.

Use

The dashboard is intended for use by government entities stewarding the CIP execution process as well as key stakeholders at the national or sub-national level. The tool provides guidance for decision-makers to answer the following questions:

- Is progress toward achieving key results leading to incremental improvements in the strategic goal? What is making a difference? What is not?
- What is the current status of key results outlined in the CIP map?
- Are current family planning efforts helping a country reach its annual targets?
• Are there any activities that increased coordination or resources to achieve the key results?

The dashboard can be used as a foundation for quarterly or semi-annual review meetings. It can also assist in broader strategy reviews on an annual, mid-term, or end-term basis to determine if key results should be modified for improved CIP implementation. Additional information on CIP reviews can be found in the CIP toolkit’s *Guidance for Developing a Technical Strategy for Family Planning CIP*.

In addition to facilitating monitoring, review, and coordination of activity implementation, dashboard outputs can be used to raise awareness of the family planning CIP among senior government staff by sharing implementation progress and bottlenecks. It also promotes transparency and accountability, as progress can be shared with civil society, allowing them to see if the government and key family planning stakeholders have upheld their CIP commitments. Furthermore, the process of regular performance monitoring can promote a sense of shared accountability among family planning stakeholders toward achieving a common goal.

**Tool Limitations**

While the CIP performance dashboard allows for monitoring, reviewing, and coordinating activity implementation as well as promoting awareness, transparency, and accountability, it is important to note that there are limitations to its use.

• The key results highlighted in the CIP performance dashboard and accompanying tools are for performance monitoring purposes only.
• The performance results displayed in the tool reflect the availability and quality of data entered. It is critical to ensure that the data entered has been collected from quality sources.
• While the dashboard provides valuable information on performance, meaningful impact cannot be accomplished without stakeholder engagement and buy-in for the CIP monitoring process.
CIP Performance Dashboard Application Process

The performance monitoring process ideally includes developing a CIP map and priority results achievement chart; setting up the performance monitoring dashboard tool; entering data; reviewing outputs; and engaging stakeholders. The steps are described in greater detail as follows:

- **Develop a CIP map.** The CIP performance dashboard draws information on key results from the CIP map, categorized by beneficiaries, program processes, and foundational supportive thematic areas (as previously described in Table 1). These results are considered priorities because they address key issues that can either constrain or enable a country in achieving their CIP goals and commitments. Because of this, it is recommended that the map be developed prior to initiation of the dashboard performance monitoring process. However, if a country does not have a map developed, stakeholders can use the dashboard application process as an opportunity to discuss and identify key results for CIP performance monitoring. More information on the CIP map and key results can be found in the CIP toolkit’s *Guidance for Developing a Technical Strategy for Family Planning Costed Implementation Plans*.

- **Develop a priority results achievement chart.** CIP performance dashboard inputs are derived from the priority results achievement chart and include: (1) KPIs that measure progress in achieving a priority result; (2) activities that need to occur to achieve a priority result; and (3) annual targets that key stakeholders involved in CIP execution can strive to achieve to reach goals. More information on the priority results achievement chart can be found in the CIP toolkit’s *Guidance for Developing a Technical Strategy and forthoming Monitoring Performance of CIPs for Results*.

- **Identify a skilled person to conduct and manage the CIP performance monitoring process.** To ensure consistent and regular performance monitoring, it is necessary to identify a skilled person to manage the performance monitoring process. As outlined in the *10-Step Process for CIP Planning, Development, and Execution, Guidance for Developing a Technical Strategy*, and other resources in the CIP toolkit, monitoring staff should be involved throughout the CIP development process.

- **Set up the tool.** Use the CIP map (or pre-determined key results) and the priority results achievement chart to set up the tool. This step includes entering information on key results, KPIs, activities, and annual targets into the settings tabs in Excel.

- **Enter performance data.** Performance data should be entered as frequently as every quarter; at the very least, annually. This data is entered into green and yellow cells. White cells will automatically populate. More information on sources for performance data can be found in the CIP toolkit’s *Guidance for Developing a Technical Strategy*.

- **Review outputs.** Users can visually display CIP execution progress via two features in the tool: CIP map status and a custom graph with accompanying dashboard.
• **Share findings with in-country stakeholders.** The CIP map status and dashboard should be shared with in-country stakeholders to promote critical thinking about programmatic challenges that can affect results, the functionality of the CIP execution performance data collection system, and whether there is a need to better coordinate activity timing and resources to improve progress toward key results.
Tool Overview: Tabs, Content, and Functions

The CIP performance dashboard includes three groups of tabs to: set up the tool, enter performance data, and review data.

Setting Up the Tool

It is important for users to carefully review this information as these settings establish the parameters for the rest of the tool's inputs. The four yellow settings tabs are:

- **Settings–Global**: This tab sets the tool parameters based on the CIP map. Users will enter the timeframe of the CIP, the beneficiaries for whom the CIP aims to create value, the thematic areas within beneficiary-facing program processes (e.g., demand generation, service delivery, supply chain/commodity security, policy and advocacy), and foundational supportive thematic areas (e.g., monitoring and evaluation, governance and coordination, finance). To accommodate the tool's use in countries that do not have a CIP map, this tab is pre-populated except for the timeframe. Users should customize settings based on country context.

- **Settings–Results**: Users will enter key results by beneficiary name and thematic area, as well as the corresponding number of key performance indicators per result. This information should be drawn from the priority result achievement chart and will set up the number of KPIs for each result.

- **Settings–Targets**: Data from the Settings–Global and Settings–Results will populate parts of this tab. Users will enter the KPIs, indicator definitions, indicator weighting, activities that contribute to achieving results, data sources for indicator performance data, and annual targets per result.

- **Custom Graph**: This feature allows users to create bar or line graphs that display indicator progress. Graphs can be set up at any time during the monitoring process and can be transferred to the dashboard.

Entering Performance Data for Each Result

The results (RES) tabs are colored blue. These tabs are created from the key result categories that are specified in the settings tabs.

As performance data for indicators is entered into these tabs and the tool is refreshed, users will find that the tool categorizes key results using a color scheme that compares performance to established annual targets. The color coding scheme is summarized in Table 2. Further explanation on how performance assessment value is calculated is covered in Box 1 in the Tool Set Up section and in Tool Set Up, Step 3.
Table 2. Performance Assessment Color Coding Scheme

<table>
<thead>
<tr>
<th>Color Code</th>
<th>Condition Status</th>
<th>Explanation</th>
<th>Variance from Target</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Exceeded</td>
<td>KPI performance has exceeded the set annual target. This suggests sustained achievement of a key result. Occasionally, exceeded performance may indicate over-emphasis and over-funding in a given area.</td>
<td>≥ 110%</td>
</tr>
<tr>
<td></td>
<td>Met</td>
<td>Activities for achieving the key result are on track.</td>
<td>90–109.99%</td>
</tr>
<tr>
<td></td>
<td>Close to Target</td>
<td>Programmatic challenges and delays have been encountered but overall performance is manageable and strong.</td>
<td>75–89.99%</td>
</tr>
<tr>
<td></td>
<td>Not Met</td>
<td>Significant challenges or delays in implementation of activities have been encountered. This key result and its associated activities need collective attention from stakeholders in order to improve.</td>
<td>&lt; 75%</td>
</tr>
<tr>
<td></td>
<td>None</td>
<td>Data is not available. This key result should be prioritized by the monitoring and evaluation team to review whether the necessary CIP data collection systems and processes are functioning appropriately.</td>
<td>No data; 0</td>
</tr>
</tbody>
</table>

Reviewing the Data

The CIP map status and dashboard tabs are green. These features allow users to review data on CIP execution performance.

- **CIP Map Status:** The CIP map is customized based on data entered for key results. Like the results tabs, the CIP map status uses a traffic light performance assessment by result. Users can review data by performance period.

- **Dashboard:** This tab stores graphs that were developed in the custom graph tab. The dashboard updates when KPI data is entered. The dashboard can be used for reporting a set of results and/or a specific CIP performance data measure.
Tool Set Up

Users should enter data in the green colored cells. Optional fields in the Settings–Targets tab are yellow. Although optional, users are encouraged to enter data if known. All corresponding white cells will be automatically populated after the user clicks the “Setup Results Sheets” and “Update KPIs” buttons embedded at the top of the settings tab sheets.

**Step 1: Settings–Global.** To define the parameters of the tool, the user will need to provide information in several fields. The first section is the timeframe that covers the start and end years and quarters of the country’s CIP. These dates mark the performance period for the Settings–Targets tab, where users will enter annual targets; the results tabs, which act as a reporting template in which key performance indicator data is entered; the CIP map in the CIP Map Status tab, which displays progress for key results achievement; and the Custom Graph tab, which generates graphs of KPI progress. Users can select the years and quarters from the dropdown menu as shown in Figure 1.

**Figure 1. Setting the CIP Timeframe**

The next series of fields are pre-populated but can be individualized by country context. These fields include the thematic areas that make up the program processes, the enabling bodies that support CIP implementation, and the beneficiaries for which the CIP aims to create value (see Figure 2).

- **Program processes** reflect the thematic areas that are “beneficiary-facing.” Thematic areas have a direct impact on clients and include demand generation, service delivery, and supply chain or commodity security.

- **Enabling bodies** are the major players involved in CIP execution. They include key stakeholders including government agencies and ministries, the private sector, donors, implementing partners, and providers that influence successful CIP implementation. The list of enabling bodies is located at the second level of the CIP map (see Figure 3), though some countries have positioned it at the bottom of their CIP map. To allow for customization, users can select the box for **Enabling Bodies Location at End**. Any value typed into the white box beside this label (for example, the “x” shown in Figure 2) will reposition the list of enabling bodies to the bottom of the map.
- **Beneficiaries** are individuals who will benefit from CIP activities. Examples include women of reproductive age, youth, men, and other groups.

**Figure 2. Setting Program Processes, Enabling Bodies, and Beneficiary Values**

![Diagram showing program processes, enabling bodies, and beneficiary values]

**Figure 3. Setting the Location for Enabling Bodies on the CIP Map**

![Diagram showing enabling bodies and their location on the CIP map]

The last field in the Settings–Global tab is “Key Result Categories.” This section builds upon the three general categories outlined in Table 1 and lists country-specific supportive thematic areas. Key result categories are pre-populated and users can customize the categories based on their country context. Key result categories create levels of the CIP map shown in the CIP Map Status tab. For example, if the user enters the categories as shown in Figure 4, the CIP map will contain five levels with those titles in addition to the “Enabling Bodies” group. All key result
categories can be viewed on the left side of the CIP map. Additionally, the designated categories automatically create the tool’s results tabs where key performance indicator data is entered.

**Figure 4. Key Result Categories**

Step 2: **Settings–Results.** The Settings–Results sheet sets up basic information for the results tabs (see Figure 5). Inputs for this tab can be found in the CIP priority results achievement chart.

**Figure 5. Settings–Results Tab**

To complete the Settings–Results tab, users need to provide information for the following fields, as displayed in Figure 5:

- **Key Results:** Enter one key result for each cell under the key results column.
• **# of KPIs:** Provide the number of KPIs that contribute to each result as articulated in the CIP priority results achievement chart. For example, three KPIs may be chosen to measure the progress of achieving one result. In this instance, the user would enter “3” in the corresponding “# of indicators” cell for that result. Providing this information will set up the number of KPI cells for each key result in the corresponding results tabs.

• **Key Result Categories:** Users should select one key result category from the dropdown menu. Each selected category should correspond to the result entered. These categories match those that were entered in the Settings–Global tab. If a user selects program processes or beneficiary for a category, the following instructions apply:

  ➔ **Program Processes:** By selecting program processes, a green cell under the program processes column will appear. Select one program process that the result is linked to from the dropdown menu (see Figure 6A).

  ➔ **Beneficiary:** By selecting beneficiary, a green cell under the beneficiary name column will automatically appear. Select one beneficiary from the dropdown menu (see Figure 6B).

**Figure 6. Dropdown Menus for Program Processes and Beneficiary Name**

Once all information for these fields has been entered, users should click the “Setup Results Sheets” button at the upper right corner of the sheet. This will add the key results to their respective results sheets. Clicking the “Setup Results Sheets” button will reset the Settings–Targets tab and corresponding results tabs. A pop-up notification will appear when a user clicks the “Setup Results Sheets” button to remind them of this. It is important to review information entered in the Settings–Results tab before moving on to this step. If other settings or performance data have been previously entered and the user is planning to modify the tool, it is advisable to copy the data into another Excel file prior to modification as a record-keeping
measure. As a reminder, brief instructions will appear in a pop-up box after clicking on the “Setup Results Sheets.”

**Step 3: Settings–Targets.** Key results and key result categories that were entered in the Settings–Results tab are populated in the white cells in the Settings–Targets tab. Users should enter the corresponding KPIs, indicator weighting, and annual targets in the green cells, as shown in Figure 7. If applicable, users can also enter indicator definitions, activities, and data sources in the optional yellow cells (see Figure 7). Users should refer to the CIP priority results achievement chart as a guide when completing this tab.

![Figure 7. Settings–Targets Tab](image)

The dashboard uses indicator weighting to account for multiple KPIs measuring progress toward achieving one result; collectively, all KPIs for a key result should equal 100 percent (see Figure 8). If the weighting for a result does not equal 100 percent, an error message will appear. These weighted targets will be used in the results tabs to calculate the weighted average performance of indicators, displayed through the traffic light performance assessment at the key result level. More information on indicator weighting and the calculations for indicator performance can be found in Box 1.

![Figure 8. Indicator Weighting Example](image)

These three indicators contribute to achieving one priority result. The sum of their weight must equal 100 percent.

When all information for the required fields has been entered, select “Update KPIs” at the top center of the sheet. This will update all of the results tabs with the corresponding indicators and annual targets. As a reminder for the user, brief instructions are also included at the top of the sheet.
Box 1. Indicator Weighting: Why Provide Weighting and How Is It Used?

Indicator weighting is required to calculate the priority result performance, as key results may have multiple KPIs that measure their achievement. Stakeholders may opt to have multiple KPIs to track one priority result for several reasons. In some cases, a key result may include various components that contribute to its success. For example, a demand creation key result to increase awareness and acceptance of family planning among men may require direct outreach to men and to influencers such as community and religious leaders. Progress in one area may not fully achieve the result when other elements lag behind. In this case, stakeholders may choose an indicator for number of men reached and another indicator for community and religious leaders reached.

In other cases, stakeholders may choose a set of linked, progressive KPIs to track progress toward achieving a priority result. In the example of demand creation among men, one indicator may be output-based (e.g., number of campaigns conducted), a second KPI may be a near-term outcome (e.g., number of men reached), and a third KPI may be a longer-term outcome (e.g., proportion of men who accept family planning methods for their partner).

By assigning weight to each KPI, progress toward the target can be calculated per result. Stakeholders may place equal weight across the KPIs, or may opt to place greater weight on prioritized indicators.

Performance is calculated based on the following basic equation:

\[
\text{Key result performance} = \text{weighted average of each KPI performance}
\]

KPI performance is calculated by taking the most recent performance value and dividing by the annual target (see Example 1). If the performance value for a KPI is not available within the two most recent quarters, then the performance for that KPI would not be calculated and the condition status indicator would be grey (no data). To account for indicators that may be over-performing (e.g., significantly over 100%) the KPI performance calculation has been modified so that indicators above 100% are capped at 100% (see Example 2).

**Example 1: Typical Scenario**

<table>
<thead>
<tr>
<th>Weighting</th>
<th>Year 1, Q1</th>
<th>Year 1, Q2</th>
<th>Year 1, Q3</th>
<th>Year 1, Q4</th>
<th>Year 1 Target</th>
<th>KPI Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>KPI #1</td>
<td>70%</td>
<td>25%</td>
<td>50%</td>
<td>95%</td>
<td>52.6%</td>
<td></td>
</tr>
<tr>
<td>KPI #2</td>
<td>30%</td>
<td>1,000,000</td>
<td>2,000,000</td>
<td>2,500,000</td>
<td>3,500,000</td>
<td>71.4%</td>
</tr>
</tbody>
</table>

Key result performance = (52.6% * 70%) + (71.4% * 30%) = 58.2%

Based on the color-coding scheme presented in Table 2, this indicator performance would be categorized as Red: Target Not Met.

**Example 2: Scenario with an Over-Performing Indicator**

<table>
<thead>
<tr>
<th>Weighting</th>
<th>Year 1, Q1</th>
<th>Year 1, Q2</th>
<th>Year 1, Q3</th>
<th>Year 1, Q4</th>
<th>Year 1 Target</th>
<th>KPI Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>KPI #1</td>
<td>70%</td>
<td>25%</td>
<td>50%</td>
<td>95%</td>
<td>52.6%</td>
<td></td>
</tr>
<tr>
<td>KPI #2</td>
<td>30%</td>
<td>1,000,000</td>
<td>2,000,000</td>
<td>4,000,000</td>
<td>3,500,000</td>
<td>114.2%</td>
</tr>
</tbody>
</table>

Key result performance = (52.6% * 70%) + (100% * 30%) = 66.8%

Again, this indicator performance would be categorized as Red: Target Not Met. The dashboard automatically calculates the key result performance when the performance data is entered and the “Refresh Dashboard” button on the CIP Map Status tab is clicked (see more in the “Entry of Performance Data” section).
Step 4: Custom Graph. The Custom Graph tab allows users to create graphs that can be transferred to the Dashboard tab for continual performance monitoring. Bar and line graphs can be generated for each KPI. Additionally, users can graph indicator performance against annual targets. Users can come back to this step at any time during the monitoring process.

Users enter the graph settings by selecting the chart type along with the CIP timeframe by start and end years and quarters. Each of the fields can be selected from a dropdown menu as seen in Figure 9. To review progress of cumulative indicators, users can select "year" in the Period Start Quarter and Period End Quarter dropdown menus. This will display all data from Q1 to Q4. For non-cumulative indicators, selecting "year" will only display Q4 data, as these indicators are not additive. Users can review non-cumulative indicators by quarter. More information about cumulative and non-cumulative indicators can be found in Box 2.

After the graph settings are in place, users will select the key result category, key results, and KPIs that they would like to create a graph for. Information for these fields can be selected from the dropdown menu as seen in Figure 10. To create new chart settings, users can clear all information by selecting “Clear Entire Chart Settings.” Users can clear the key result category, key results, and KPIs only by selecting “Clear Key Result Selections Only.”

A customized graph will appear if a user selects “Generate Graph” (see Figure 11). Generated graphs can be added to the Dashboard tab by selecting “Add Graph to Dashboard.” Because graphs will automatically update as performance data is entered, setting up the relevant graphs early will allow easy access to an updated dashboard as needed.
Figure 11. Creating Indicator Progress Graphs

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Chart Type</td>
<td></td>
<td>Clear Entire Chart Settings</td>
</tr>
<tr>
<td></td>
<td>Period Start Year</td>
<td></td>
<td>Clear Key Result Selections Only</td>
</tr>
<tr>
<td></td>
<td>Period Start Quarter</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Period End Year</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Period End Quarter</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Graph Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select Key Result Category</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select Key Result</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Select KPI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financing</td>
<td>Mobilize new FP resources through innovative mechanism including private sector</td>
<td>Number of new sources of FP funding identified</td>
<td></td>
</tr>
<tr>
<td>Program Processes</td>
<td>Increase the number of facilities providing high quality youth-friendly services</td>
<td>Percentage of public facilities offering FP services to adolescent (public and private)</td>
<td></td>
</tr>
<tr>
<td>Supervision, Monitoring, &amp; Coordination</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Generate Graph

Add Graph To Dashboard

Your graph will appear here
Entry of Performance Data

**Step 5: Results.** Enter data for each performance indicator in the results (RES) tabs. The tool will generate results (RES) tabs based on the key results categories entered in the Settings–Global tab. Each sheet in the results tabs will contain white cells that are populated with the corresponding key results, key performance indicators, and annual targets. Users can enter quarterly performance data into the green cells.

Figure 12 shows the beneficiary results tab before key performance indicator data is entered. Additionally, users can see indicator definitions that were entered into the Settings–Targets tab by viewing the comments in the cells of each indicator.

**Figure 12. Sample Results Tab with Indicator Definition**

Prior to entering performance data for each KPI, users should consider whether the KPI is cumulative or non-cumulative. Cumulative indicators will add quarterly performance data from the previous quarter. Non-cumulative indicators will display performance data that reflects the performance only from that quarter. Examples of cumulative versus non-cumulative indicators can be found in Box 2.

**Box 2. Entering Performance Data for Cumulative and Non-Cumulative Indicators**

Indicator performance should be entered in a way that is comparable to the benchmark. The data must be entered so that it is always consistent against the annual target. The following is an example of cumulative and non-cumulative indicators:

- **Number of family planning commodities distributed** *(cumulative indicator)*: If the annual target is set at 1 million, then the indicator performance by quarter should be entered so that it includes the previous quarter's performance.

- **Stock-out rates** *(non-cumulative indicator)*: If the annual target is 5 percent, then the indicator performance by quarter should be entered for that quarter's performance only.
As previously noted, each of the results tabs contains a colored performance assessment to monitor progress toward achieving a key result, which can be found in the condition status cell located in the key performance indicator column (see Figure 13). The designated color code is based on calculations that take the weighted average of the KPI value against the target as well as on the period of performance that is selected in the CIP Map Status tab. The condition status can be updated in the results tabs by clicking the “Refresh Dashboard” button in the CIP Map Status tab after KPI data has been entered and updated (see Figure 14).

**Figure 13. Key Result Condition Status**

**Figure 14. Updating the Key Results Condition Status**
Monitoring Outputs

Once all key results, KPIs, corresponding activities, targets, and performance data have been entered into the settings and results tabs, the user can view outputs using the following features.

CIP Map Status

The CIP Map Status tab shows a simplified version of the CIP map (see Figure 15). Users can select the performance period by selecting year and quarter from a dropdown menu (see Figure 16). Similar to the custom graph settings, users can select the year view in the CIP Map Status tab by selecting “Year” in the quarter dropdown menu, as shown in Figure 16B. By selecting “Year,” key result condition status will be displayed for the last quarter of a specified year. More information about the year view can be found in Step 4: Custom Graph in the “Tool Set Up” section of this guide.

After selecting the performance period, users can select “Refresh Dashboard” at the top of the sheet. This will update the map with the color coding scheme for the selected performance review period. The map can then be used to guide decisions on what results may need additional support and/or resources to effectively execute the CIP. The Guidance for Developing a Technical Strategy for Family Planning CIP in the CIP toolkit provides additional guidance on the periodic plan review process and how CIP map status outputs can be used to guide a review.
Dashboard

The Dashboard tab displays the graphs that the user has created in the Custom Graph tab. Users can add multiple graphs to the dashboard by selecting “Add Graph to Dashboard” in the Custom Graph tab as shown previously in Figure 11. A sample dashboard can be seen in Figure 17.
As users enter quarterly KPI data into the results tabs, these generated graphs will automatically update. The CIP map status and the dashboard provide performance data that can be disseminated to key stakeholders during the CIP performance review period.
Annex 1. Glossary

**Beneficiaries**: Groups of people that the CIP aims to target. Examples include women of reproductive age, youth and adolescents, and men.

**Beneficiary-facing program processes**: Most CIPs address six key thematic areas for family planning: demand creation; service delivery and access; contraceptive security; policy and enabling environment; financing; and stewardship, accountability, and management. Within the context of the CIP map, beneficiary-facing program processes refer to the thematic areas that have a direct effect on the CIP’s beneficiaries; examples include demand creation, service delivery, supply chain or commodity security, and policy and advocacy.

**CIP map**: A tool for monitoring CIP implementation that visually displays a snapshot of key results.

**Enabling bodies**: The major players involved in CIP execution—namely, key stakeholders and implementers that influence and support successful implementation of the CIP. Examples include government agencies or ministries, private sector partners, donors, implementing partners, and providers.

**Foundational supportive thematic areas**: Thematic areas that represent the major systems that need to be in place for CIP execution to be conducted as intended; examples include financing, monitoring and evaluation, and governance and coordination.

**Key performance indicators**: A measurable value that is used to monitor progress toward achieving a CIP’s key result.

**Key result categories**: A CIP’s thematic areas, consisting of beneficiaries, beneficiary-facing program processes, and foundational supportive thematic areas.

**Key results**: A set of prioritized results from the broader list of strategic results in a country’s complete CIP document. These specific results are selected as priorities because they are key bottlenecks to advancing the CIP and are considered to be catalytic to achieving a country’s CIP goals.

**Priority results achievement chart**: A tool for monitoring CIP implementation that captures the following information in one table: (1) key performance indicators that can measure progress in achieving a priority result, (2) activities that need to occur to achieve a priority result, and (3) annual targets that key stakeholders involved in execution can strive to achieve to meet goals.
Annex 2. Instructions for the Backup and Restore Feature

Recognizing that a country’s CIP map and priority results achievement chart are not static documents, the CIP performance dashboard is equipped with a backup and restore feature that enables users to make changes to key results, indicators, and annual targets even after the tool has been set up and performance data has been added. In order to add additional key results or make changes to existing results, the following steps to backup and restore data need to be taken in order to retain information that was previously entered in the Settings–Targets tab and elsewhere in the tool.

**Step 1: Backup current sheets**

1) In Row 4 of the Settings–Results sheet, type an “X” in cell F4 next to the words “Backup Result Sheets,” as shown in Figure 18-A.

2) Next, click the “Setup Results Sheets” button at the top of the sheet (see Figure 18-B). This will create backups of the current Settings–Targets and results (RES) sheets. These newly created sheets will appear at the bottom of the screen in red tabs, as shown in Figure 19.

![Figure 18. Setup for the Backup Results Sheet Feature](image)

![Figure 19. Generated Backup Sheets](image)
Step 2: Revise key results and KPIs for performance monitoring of the CIP as needed

1) Users can add or delete results and/or KPIs based on decisions made by government entities and stakeholders involved in CIP execution.
   - To add results and/or KPIs, enter new information in the remaining green cells in the Settings–Results sheet below previously entered information.
   - To delete results and/or KPIs, remove information from the current list in the Settings–Results sheet. Do this by deleting information from the cells—do not delete any rows or columns as this can alter the formulas embedded elsewhere in the tool.

2) Previous key results and KPIs will still be included in the revised Settings–Results sheet after generating backup sheets.

Step 3: Restoring information from the backup

1) Once revisions are complete, remove the “X” in cell F4, next to the words “Backup Result Sheets” and place an “X” in cell F5, next to the words “Restore Result Sheets” (see Figure 20-A). Click the “Setup Result Sheets” button at the top of the Settings–Results sheets (see Figure 20-B). This will pull information that was saved in the backup to the new Settings–Target and results (RES) sheets.

![Figure 20. Restore Results Sheets](image)

2) Revise the KPI information in the Settings–Targets sheet based on edits made to the Settings–Results sheet. Keep an “X” in cell F5, next to “Restore Result Sheets” in the Settings–Results sheet. Click the “Update KPIs” button at the top of the Settings–Targets sheet when revisions are complete.

3) All information from previous backups should be transferred over to the new results (RES) sheets. For missing data points, manually re-enter information in the backup results sheets in the red tabs.