

## 2. PREPARING THE REPORT



# CHECKLIST

### ***Establish a production schedule***

Through consultations, establish a production schedule that covers every phase of report production from research to publication. Deadlines should be practical so there may be a reasonable expectation they may be met.

Appoint a coordinator to monitor the production schedule and production deadlines so as to keep on track, on time and on budget.

The coordinator should assist the HDR team in following UNDP's results-based management framework to enhance management effectiveness and accountability.

### ***Carry out comprehensive data collection and processing***

Conduct a survey of the data available on the theme of the HDR and related issues and on human development indicators. International organizations and specialized governmental, non-governmental and civil society organizations are rich repositories of useful data.

Establish an institutional partnership on data issues with national statistics agencies, which are crucial in the collection and production of reliable, relevant qualitative and quantitative data.

Examine regularly the availability, reliability and relevance of quantitative data. Revisit questionable data, update data and fill data gaps.

Explore fruitful levels of data disaggregation such as by gender, place of urban or rural residence, age, regional location, religious affiliation and ethnic group. Disaggregate time series to evaluate development trends among individual population groups, regions, or sectors.

Identify non-statistical qualitative data needs and conduct interviews, surveys, opinion polls, perception studies and focus groups to meet the needs. Survey people's perspectives on development within their own reality.

Enrich the human development alliances and other consultative links that have been undertaken as part of the foundation of the human development community during the initial steps of the HDR process.

Carefully prepare and distribute background materials before consultations.



# CHECKLIST

Team members, including authors and contributors, should take part in consultations. Ensure that the various components of the national or regional report team meet regularly to discuss the inputs gathered and to remain informed and active in addressing the needs of the report.

Create a dedicated website and social media outlets to be used in establishing communities of practice and knowledge networks to share information and discuss findings. Hold regular public meetings, consultations and workshops. They should be inclusive and participatory and involve all key stakeholders. Post reports on the results of the consultations on the website to solicit additional feedback.

## ***Address the general theme of human development***

Include a focus on an analysis of the national or regional Human Development Index that more closely reflects the local, national, or regional situation.

Disaggregate data to identify critical disparities across social groups defined by geographical position, religious affiliation, gender, socioeconomic status, or racial or ethnic identity.

Remain attentive for innovative approaches to the measurement of development that respond more accurately to the particular needs of the country or region.

Consider using alternative concepts in the measurement of human development such as the gender inequality index, the inequality-adjusted HDI, the multidimensional poverty index, the human poverty index, the gender-related development index and the gender empowerment measure.

Additional surveys of critical aspects of human development would also be worthwhile, including measures of human rights, political freedoms, participation, sustainability, human security, or a broader agenda for policy research to respond to national or regional development challenges.

Select appropriate measurement data on human development and the links between these data and specific advocacy objectives.



# CHECKLIST

## ***Address the specific HDR theme and related issues***

Clearly define the theme and pinpoint key issues related to the theme; establish a conceptual framework linking the theme and human development concerns.

Carry out a literature review and create and maintain a repository of core documentation from local and external sources on the theme and related issues.

Organize consultations and seminars on the theme and related issues.

Conduct interviews and surveys to capture the perspectives of people dealing with the issues analysed in the HDR as part of their daily lives.

Commission experts to conduct background research and produce other background material.

## ***Undertake a critical evaluation of relevant government development policies***

Hold consultations to determine the policy issues that the report will seek to address.

Review the effectiveness of previous or current policies.

Examine traditions, historical and cultural norms, and the social and economic environment to evaluate the local constraints on policy-making.

Explore aspects of the regional and global context that broaden or limit government policy choices.

Establish a benchmark scenario that indicates the outcome if current trends continue undisturbed.

## ***Based on the evidence, develop appropriate report conclusions***

Test the conclusions during consultations and seminars organized on the issues and perspectives contained in the report.



# CHECKLIST

## ***Produce clear, concrete and practical recommendations***

Each recommendation should include a description and analysis of the basic intervention strategy.

Be aware that the value of the recommendations will depend on the comprehensiveness of the perspectives of the contributors to the analysis, the clarity of the analysis and the soundness of the consideration of alternative policies.

## ***Production - Identify the target audience***

Determine the target audience of the HDR — the groups at which the messages of the HDR are principally aimed — through consultation among the main stakeholders and partners.

Craft the messages in the report with a view to communicating directly with the target audience.

Seek the contribution of the target audience during the drafting process.

Announce components of the target audience publicly early on as part of advocacy.

## ***Set the outlines of the report***

Create detailed chapter outlines of the report, possibly through meetings among the HDR team and other actors and stakeholders to discuss ways to enhance and expand the concept note and the project document.

Include a proposed structure, the main headings and a projected length.

Share the report outline with Teamworks as an advocacy tool and to solicit feedback.

## ***Prepare a first full draft of the report***

Produce draft chapters that clearly define the theme, describe local conditions, supply a clear analysis of human development in the country or region, examine the report's theme in depth, identify related problems and issues, focus the analysis on past and current government policies in the area of the theme, and indicate research gaps that merit further study.



# CHECKLIST

The draft chapters should be relevant and readily accessible to the target audience, show a progression in the presentation of the data and analysis, and achieve a balance among the presentation of factual information, description and analysis.

Within the narrative, develop the conclusions of the report.

Identify well-reasoned, well-documented recommendations.

## ***Submit the draft for internal review***

Share the first draft with the steering committee, the advisory committee, other advisors, the authors of background papers, stakeholders and other experts involved in the creation of the draft.

Check especially for the appropriate use of data and the quality of the analysis.

UNDP resident representatives and regional directors should ensure that the report complies with the six core principles outlined in the HDR quality standards module and the procedures and standards detailed in the UNDP publications policy.

UNDP resident representatives and regional directors should gauge the accuracy, pertinence and timeliness of the data; the soundness of the analysis; the openness, fairness and impartiality of the arguments; and the coherence and consistency of the recommendations in relation to the data and the analysis and as practical solutions within the context of the current situation in the country or region.

## ***Prepare and submit a new draft for external peer review***

Incorporate the feedback from the consultations on the first full draft, adjusting the analysis and sharpening arguments and the principal messages as needed.

Share the draft with key outside experts so as to check the analysis and the use of data and to test messages. Every national and regional HDR must be reviewed by two or three independent expert reviewers not involved in the writing or research. Ensure that at least one reviewer is a gender expert.

Design the review so as to contribute to the impartiality of the report.

Describe the peer review process directly in the report.



# CHECKLIST

## ***Prepare and submit the final draft for executive review***

Incorporate feedback from the peer review and related consultations, as appropriate, into the final draft.

Summarize the recommendations in one or two locations in the text, usually in front or back, but also in strategic locations within the relevant chapters.

Formulate the main messages and position them in a highly visible part of the report.

Prepare front and back matter, including title page and back cover, copyright page, table of contents, foreword (optional), abstract (optional), preface (optional), acknowledgements (optional), list of contributors (optional), list of abbreviations and acronyms (optional), and introduction, overview, or executive summary; a description of the HDR preparation process and methodology (in the introduction); footnotes or endnotes; appendices or annexes (optional); glossary of statistical or technical terms (optional); a complete bibliography or reference list of all source material, including data sources; and an index.

Undertake an executive review: national HDRs should be reviewed and endorsed by resident representatives, and regional HDRs should be reviewed by the Office of the Administrator of UNDP.

Consult the chief statistician at HDRO on engagement with national statistics agencies, as well as on the agreement on HDI-related indicators with the United Nations Statistical Commission.

Include in the report a standard disclaimer wherein the authors take full responsibility for the contents of the reports and UNDP, its Executive Board and its member states are disassociated from any responsibility.

## ***Establish and print the final product***

Acquire the UNDP style manual and review other national and regional HDRs to determine the appropriate look of the report. Establish a preferred style for report formatting, spelling, references, and so on.



# CHECKLIST

Hand the text over to the editor, who should check for consistency and accuracy and ensure that the language and style are tight, harmonious and engaging, conform to the preferred style and the UNDP style manual and reinforce the messages of the report.

Assign the copyright owner according to national and international laws and regional practice.

Provide information within the text on the method of gaining access to the hard copy and online versions of the report, which must be made available online prior to media and advocacy outreach.

Begin the translation of the report, if necessary. The entire report should be available in the main national or regional language and other local languages. An effort should be made also to produce the report in English, French, or Spanish. If this is not financially feasible, key sections and summaries containing the principal messages, findings and recommendations should be translated into local languages and English, French, or Spanish (or all of these).

Hand the text over to the designer, who should tailor the report as much as possible to appeal to the target audience.

Ensure that the front cover conveys the report's theme in a clear, but intriguing way.

The points of view of local actors and other people living in communities who regularly come into contact with the themes and issues analysed in the report should be included in an eye-catching way.

Make sure other basic design principles are applied, especially balance, consistency, contrast, proximity and the judicious use of space.

In a timely manner, confirm a partnership with HDRO and United Nations publications or a commercial publisher print the report.