

TalkingQuality Planning Workbook

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What Is This Workbook?

The reporting of health care quality information is a challenge under the best of circumstances. To help you stay on top of what you have to do, this interactive Workbook will help you develop a plan for accomplishing your tasks and making the many decisions involved in initiating and implementing a successful effort.

For each of the tasks listed here, you will find a set of pertinent questions and a list of issues and concerns to keep track of in your Workbook. All of the issues noted here are discussed in the TalkingQuality Web site, with illustrative examples as well as advice based on the findings of researchers and the experiences of other sponsors of consumer health information initiatives.

What Do I Do With It?

This Workbook is meant to be used in conjunction with the TalkingQuality Web site at <http://www.talkingquality.gov>. You can use it in several ways:

- As a guide for developing a project plan.
- As a launching pad that will help you identify the material in this Web site that is most relevant to your specific concerns.
- As a tool that will let you explore related issues by skimming at the surface level and delving deeper into the areas that intrigue you.

Review the Tasks

Task A

Decide what you want your project to accomplish.

Task B

Gather information to set the stage for a successful project.

Task C

Set up the management processes needed for the project.

Task D

Obtain and analyze data on quality.

Task E

Decide what information to convey to your audience.

Task F

Determine how to present the data so that it is most useful for your audience.

- F(1): Consider methods for making the information more manageable.
- F(2): Provide your audience with a meaningful point of comparison.

Task G

Test materials with your audience.

Task H

Select the best way to package information on quality for your audience.

Task I

Distribute the information to your audience.

Task J

Create ways to help your audience use the information.

Task K

Evaluate the progress of the project toward your goals.

Use the Workbook

Task A. Decide what you want your project to accomplish.

1. What are your *specific goals* for this project?

In your Workbook:

- List the goals of your organization.
- If you are working with partners, make a list of the goals that you all have agreed to. Share this list with your partners and note any concerns you may hear and how they were resolved.

2. *How will you know if you achieve your goals?*

In your Workbook:

- Document your plans for evaluating the information you develop.
- Specify how you expect that this evaluation will track progress towards your goals.

Task B. Gather information to set the stage for a successful project.

3. What do you know about the health care *environment* in which this project will take place?

In your Workbook:

- Summarize what you know about your market. Note useful sources of information you've used, whether people or documents.
- Write down what you still need to know. Jot down any ideas for where you might be able to find this information. Note whether you've asked anyone to follow-up on this research and any deadlines you've set.

4. For whom is this information intended? Who are *the primary and secondary audiences*? What are their relevant *characteristics*?

In your Workbook:

- List each audience with a summary of what you think you know about them. Be sure to update this summary as you learn more about your audiences.
- Document the steps you will take to learn more about your audience.

5. Which organizations would make good *partners* for this project?

In your Workbook:

- List the organizations that have worked with your organization on similar projects. Note those that share your interest in quality information.
- List other organizations in your community that may share your interest. Gather contact information.
- Assign responsibility for contacting these organizations. Keep track of responses since you may want to contact them again after the project is up and running.

Task C. Set up the processes for managing the project.

6. What are the costs associated with the project as you currently envision it?

In your Workbook:

- Draft a budget for your project. Be sure to budget for such items as development testing, educational/promotional programs, and support services.

7. Is your organization prepared to bear the *financial burden* of the project?

In your Workbook:

- Identify sources of funding within your organization. Note obvious sources as well as potential ones that could be tapped in the future.

8. Who else could potentially provide additional funding?

In your Workbook:

- Note potential sources of funding in your community, including foundations, government agencies, and other sponsors.
- Create a contact list, assign responsibility for outreach, and keep track of responses.

9. What is a realistic *schedule* for the project? Will this schedule allow you to meet your objectives?

In your Workbook:

- Create a schedule for accomplishing each of the major steps.
- Indicate what you need to know and what must be in place in order to move forward with each step.
- Revise and update the schedule as needed to reflect what actually happens.

10. Do you have the *staff and leadership* in place to get the work done?

In your Workbook:

- Note the names of the people who will be leading and staffing the project.
- Jot down areas of expertise that you have covered. Note areas of expertise that you may be missing (such as statistical analysis) and indicate how you will either cover these areas or compensate for them (e.g., by contracting with a consultant or vendor).

Task D. Obtain and analyze data on quality.

11. What are the *sources* for the data you want? What are the best ways to gain access to them?

In your Workbook:

- Indicate the data sources that you plan to use.
- Note any issues involved in gaining access to them and how you plan to resolve them.

12. Who will be responsible for collecting the data? For analyzing the data?

In your Workbook:

- Indicate who will be responsible for collecting the data and for analyzing the data.
- If vendors are necessary, note the names of appropriate vendors and document your criteria for choosing one.

13. How will you ensure that the data is *credible*?

In your Workbook:

- Document any concerns that you, your partners, and your audiences may have about the credibility of the data.
- Indicate what you will do to address those concerns.

Task E. Decide what information to convey in your report.

14. What are the information needs of your intended *audiences*?

In your Workbook:

- Document your plan for gathering this kind of information from your audience (e.g., four focus groups of employees over a period of 1 month).
- Document what you learned about your audience. Note the implications for what they may need to see in a quality report.

15. What's the *message* you want to deliver? What do you want your audience to learn from this information?

In your Workbook:

- List the messages that seem most important to you and your partners.
- Summarize your plan for testing these messages with your audience.
- After the testing, document what you have learned about the messages.

16. What *specific information on quality* do you want to share?

In your Workbook:

- Indicate what part(s) of the health care system you want to report on (e.g., hospitals, health plans, nursing homes) and why you chose to focus on it.
- State generically what you want your audience to understand about those health care organizations.
- List the standardized measures and, if available, measurement sets that are available for each kind of health care organization.
- List your criteria for selecting measures (e.g., that they are technically sound, meaningful to consumers, and readily available).
- Indicate which measures would meet your criteria and support your communication objectives.

17. What *other information* do you want to give your audience?

In your Workbook:

- List the types of information (other than the measures of quality) you would like to share with your audience.
- For each type of information, indicate any problems you may encounter in providing it. For example, you may want to explain the process for appealing health plan decisions, but pending legislation may affect what enrollees can do.
- For each type of information, indicate how it would be useful to your audience. (If you have to cut back your report, it will be helpful to have some idea of what is more expendable.) Consider testing your ideas with your audience to get their reaction.

18. How will you explain *statistical* information and methodological issues?

In your Workbook:

- List the statistical concepts that are likely to come up in your report.
- Document the ways in which you could explain these concepts. You may want to review existing quality reports to see how other sponsors have handled this.
- Test your ideas with your audience to see if your explanations are truly helpful to them.

19. What will you do to *help your audience* wade through complex information?

In your Workbook:

- List the ways in which you can help people navigate through your report (e.g., a table of contents, color-coded pages, a consistent format for data displays).
- Sketch your plans to conduct audience testing to see how they move through the document and where they get confused.
- Document your findings from the testing. Note the implications for new or different navigational aids.

20. What do you expect them to do with this information?

In your Workbook:

- Indicate how you hope people will use the information you are providing.
- List some of the interim outcomes you hope to find evidence of (e.g., an awareness of the information, an understanding of what the information means).

Task F. Determine how to present the data so that it is most useful for your audience.

F(1). Consider methods for making the information more manageable.

21. Do you want to *aggregate* quality information into categories for your audience?

In your Workbook:

- List any existing models of categories and measures that seem consistent with your plans so far. Indicate what you would have to do to adapt them to meet your needs (e.g., if you want to report measures that were not included in the original model).
- Sketch out other ways of organizing and possibly combining the measures you want to report.
- Indicate how you will determine which measures belong in which categories. Document your results and any unresolved issues.
- State your plans for testing these organizational schemes. Document any findings and how you can change your model.

22. Will you report *summary scores* rather than scores for individual quality measures?

In your Workbook:

- State how you would combine to create summary scores. Indicate how you will ensure that the measures are based on the same scale.
- Indicate whether you plan to weight the measures in each category unevenly. If so, state how you will determine the appropriate weights. Note how changes in the weights may affect the summary score.

23. Will you report multiple *layers* of information?

In your Workbook:

- Indicate your plans to determine whether your audience would find layered information to be useful. Document your findings and the implications for your report.
- State how you could handle the desired degree of layering in different media (e.g., a bound report, a Web-based document). Note the implications for which media would be most appropriate for your audience.

F(2). Provide your audience with a meaningful point of comparison.

24. What kind of *comparison point* will you provide?

In your Workbook:

- List the kinds of benchmarks you could provide given the data you plan to report. For example, for both CAHPS® and HEDIS® data, you can offer averages or “best-in-class” at a State, regional, and national level.
- Indicate which of these benchmarks would be most consistent with what you want your audience to understand and explain why that is.
- State your plans for testing this choice with your audience. Document your findings and note any implications for changing your approach.

25. What *format(s)* would be most appropriate for the comparative data you have?

In your Workbook:

- List some of the ways in which you could display the information (e.g., tables with symbols, bar graphs).
- Note which displays seem most appropriate for the information you want to present and your audience.

Task G. Test material with your audience.

26. How will you determine which *format(s)* to use?

In your Workbook:

- List the things you would like to test with your audience (e.g., messages, text, graphics, design elements).
- Indicate how you intend to get feedback from primary and secondary audiences.
- Document your findings, noting how audiences responded and how you can address any issues that your audience(s) raised.

Task H. Select the best way to package information on quality for your audience.

27. Are *written materials* appropriate for your audience?

In your Workbook:

- Summarize what you already know about the literacy level of your audience and their preferred ways of getting information. Indicate what you can do to learn more about their capabilities and preferences.
- Indicate where and how your audience currently gets related information about health care. Note how that information is delivered, if it is not in writing.

28. If so, what *modes of communication* (e.g., simple brochures, bound reports, Web sites) will be most effective?

In your Workbook:

- List the possibilities that seem most feasible given the resources available to you.
- Indicate how you could get some feedback on these ideas (e.g., by consulting with secondary audiences—like human resources staff—who regularly deal with your primary audience).

29. If not, what *other options* are available to you?

In your Workbook:

- List the ways in which your audience currently gets much of its information.
- Note which of these approaches could offer a channel for providing information about health care quality without relying on written materials (e.g., radio talk shows). Indicate the feasibility of each approach and what would be required to make it happen.

Task I. Distribute the information to your audience.

30. How will you *educate* your audience to make them aware of, interested in, and motivated to use your information on health care quality?

In your Workbook:

- Indicate what you know about how your audience is likely to get new information.
- List the communications vehicles at your disposal (e.g., newsletters, posters, mailings). Note how many people they are likely to reach and the amount of attention they are likely to get.
- Create a communications plan that specifies what you will say, what vehicles you will use to deliver it, how many people to be exposed to your message, how you will test educational materials with your audience, and your plans for evaluating your effectiveness over time.

31. What are the *best ways* to get the information on quality to your audience?

In your Workbook:

- State where your audience is most likely to be receptive to this information (e.g., at home, in the doctor's office). Note the feasibility of and any obstacles to reaching them at this location.
- Indicate when your audience is most likely to be receptive (e.g., prior to open enrollment, prior to a hospitalization). Note the feasibility of and any obstacles to this timing.
- Note the usual sources of important information for your audience. List any people or organizations you could enlist to help you get information out.

32. Can you use *mass media* to help deliver your message?

In your Workbook:

- Given where your audience is located (e.g., all over the country, in a limited geographic area) and where it is most likely to get information, state whether the mass media could be a useful way to reach them and why.
- If so, note which kind of media could be most helpful (e.g., mainstream press, ethnic press, radio talk shows).
- Make a list of suitable outlets and gather contact information. Note any pertinent deadlines or restrictions.

Task J. Create ways to help your audience use the information.

33. Who does your intended audience *trust*?

In your Workbook:

- State what you know about where your audience is likely to turn for help and guidance. If you don't know, indicate how you plan to get more information about this.
- List who may be available to help your audience understand how to apply information on quality to their health care decisions. Indicate the feasibility of working with these trusted advisors to help your audience.

34. What *decision-support tools* would be most appropriate for your audience? Can you provide them?

In your Workbook:

- Indicate what materials you could provide to help your audience. Note what is involved in each option and how feasible it is.
- State your plans for testing different options with your audience. Document your findings and the implications for effective decision support.

Task K. Evaluate the progress of the project towards your goals.

35. How will you determine the success of your project?

In your Workbook:

- Make a list of specific ways in which you could measure success (e.g., 50 percent of the intended audience will be aware that the information exists). Note which of these measures of success resonate within your organization and with your partners. Also, indicate which are short-term goals and which are long-term.
- Document how you will collect this information. Note anything that has to be done in the early stages of the project (e.g., a survey to establish a baseline) and indicate your plans for doing so.

36. How will you share the *lessons* you have learned?

In your Workbook:

- Sketch out a plan for documenting and sharing what you have learned from your experience with quality reporting.
- Note how you would make this information available internally as well as to external organizations.

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