TalkingQuality

Your Project Checklist:
Plan Your Reporting Project

This document contains checklists for the following sections of Plan Your Reporting Project:

- Identify the Audience
- Identify Objectives
- Know the Reporting Environment
- Find Potential Partners
- Identify the Subject
- Choose Quality Measures
- Decide on Your Role
- Determine How To Pay
- Manage the Project
- Gain Trust of Providers
- Test Your Report
- Prepare for an Evaluation

Return to Your Project Checklist.

Plan Your Reporting Project:
Identify the Audience

Questions and Tasks

☐ Who is most likely to use this report? How are they likely to access and use this information?
Type your response here.

☐ Who is likely to help your target audience (i.e., your secondary audiences)?
Type your response here.

- Under what circumstances?
Type your response here.

- How are they likely to access and use the information?
Type your response here.

☐ What do you know about the sociodemographics of your audience(s)?
Type your response here.

☐ What do you still need to know about your audience?
Type your response here.

☐ How will you gather information about your audience? What sources are available to you?
Type your response here.

☐ How will you test your strategies and materials with your audience?
Type your response here.

Plan Your Reporting Project:
Identify Objectives

Key Points

- Create well-defined, measurable objectives for your reporting project. Clear objectives will guide your organization toward achieving its goals.

- It is important to have realistic objectives that can be accomplished in a given timeframe and will result in a report that will be useful to your audience.

- The objectives you establish for your project will become the focus of your evaluation once your project is completed.

- Think ahead about what information you will need to evaluate your project once it is complete.

To learn more, go to [What Are the Objectives for Your Health Care Quality Report?](#)

Questions and Tasks

☐ What are you trying to accomplish with your reporting project? List your goals.
Type your response here.

☐ Do all the key players in the reporting project agree on the goals for the reporting project? Note issues that came up and how they were resolved when the team was deciding on the goals for the project.
Type your response here.

☐ What will you do to achieve specific goals? Describe the strategies that will move you toward those goals.
Type your response here.

☐ How can you measure progress toward the goals you have listed?
Type your response here.

☐ What is the timeframe for completing your reporting project? Can you achieve your objectives within this timeframe?
Type your response here.

☐ How will you evaluate the progress of your reporting project? Describe the strategy you will use to assess the extent to which the project met its goals.
Type your response here.

Plan Your Reporting Project:
Know the Reporting Environment

Key Points

- Review the local environment in which your reporting project will take place. This information will help you identify factors that may affect the feasibility and effectiveness of your project.

- Determine whether your audience has health care choices to make and the nature of those choices.

- Get familiar with all the major players and other stakeholders in the market and what influence they will have on your reporting efforts.

- Assess the political, staffing, and financial implications of your reporting effort. This will help you anticipate the costs and benefits associated with your reporting project.

To learn more, go to What Is the Environment for Reporting on Health Care Quality?

Questions and Tasks

☐ What do you know about the local environment in which you will be undertaking your reporting project?
Type your response here.

☐ Do you have any concerns about starting your reporting project in this environment? Document them here.
Type your response here.

☐ What do you know about the health care environment? How can you learn more about it?
Type your response here.

☐ What are the major health care organizations (providers and payers) in your area? What do you know about their customers/patients, geographic reach, and role in shaping the market?
Type your response here.

☐ If your audience has a health care choice to make, what is the nature of the choice? How extensive are the options?
Type your response here.

☐ What information is relevant to the choice faced by your target audience and how can you provide this information?
Type your response here.

☐ Document all the information that you have gathered on any performance reports offered in your area.
Type your response here.

- What information is provided and how long has the information been available?
Type your response here.

- If the reporting projects have been evaluated, what conclusions have been drawn?
Type your response here.

- Can you identify any needs or gaps?
  Type your response here.

- How is what you are thinking about doing the same or different from other reporting that is being done or has been done?
  Type your response here.

☐ Which stakeholders might be affected by your reporting effort? Who is likely to become an ally in the effort? Who may be opposed?
Type your response here.

☐ Do you currently have the manpower, expertise, and finances to undertake this kind of project?
Type your response here.

Plan Your Reporting Project:
Find Potential Partners

Key Points

- A quality reporting project is often more effective when multiple organizations come together to make decisions, tackle logistics, and combine resources.

- Sponsors may benefit from the expanded audience, decreased financial burden, and greater perceived credibility that come with collaboration.

- Audiences may benefit from greater consistency in information and messages about plans or providers in their area.

- Collaboration also helps to ensure that health plans and providers are not overly burdened for information.

- Collaboration can also be time-consuming and require difficult compromises.

- When seeking partners, it is important to consider compatibility. You and your co-sponsors should have similar interests, reasons, and commitment to creating performance reports.

To learn more, go to [Who Could Partner in a Health Care Quality Reporting Project?](#)

Questions and Tasks

☐ What are the advantages to you and your audience if you work with partner(s) on this reporting project?
Type your response here.

☐ What are the disadvantages of involving partner(s) in your reporting project?
Type your response here.

☐ List all the organizations that could make good partners for this project.
Type your response here.

- Include organizations that you have worked with before as well as others in your community that have an interest in quality reporting.
  Type your response here.

- Keep an eye out for organizations that may not appear to be potential partners at first glance but share your interests and concerns.
  Type your response here.

☐ Consider the following factors to judge your compatibility with each potential partner shortlisted to work with you on this project:

- Do you have similar reasons and interests for wanting to measure quality?
  Type your response here.

- Do you share the same level of commitment for measuring health care quality and informing consumers?
  Type your response here.

- Will it be possible to keep the number of decisionmakers involved down to a manageable number?

  Type your response here.

- What is your past history with this organization.

  Type your response here.

☐ Do you have enough information to make a decision on whether you want to collaborate with other organizations for this project? If not, what would you need to know?

Type your response here.

☐ Assign responsibility for contacting these organizations. Keep track of their responses since you may want to contact them again after the project is up and running.

Type your response here.

Plan Your Reporting Project:
Identify the Subject

Questions and Tasks

☐ For what types of health care organization can you get information?
Type your response here.

☐ What criteria will you use to determine which type(s) will be the subject of your report?
Type your response here.

☐ What type of organization does your audience want to know about?
Type your response here.

☐ How will information on this subject meet the needs of consumers?
Type your response here.

☐ How will this information support the message you want to convey about quality and choice?
Type your response here.

☐ What are the financial implications of reporting on this subject? How might it affect the source of the project's funding?
Type your response here.

☐ Do you have any contractual relationships/obligations that may affect the information you want to report on the quality of organizations?
Type your response here.

☐ List the challenges you may face to provide information on this subject to your audience.
Type your response here.

☐ If you decide against a particular subject, document why.
Type your response here.

☐ Do you want to report on multiple subjects?
Type your response here.

- If no, document why not.
  Type your response here.

- If so, do you have the resources to report on multiple subjects at the same time?
  Type your response here.

- What are the implications of rotating the subjects of your quality reports?
  Type your response here.

Plan Your Reporting Project:
Choose Quality Measures

Key Points

- It's possible to measure and report on many aspects of a health care organization's performance, so you need a way to limit what you include.

- The measures selected for your reporting project should be relevant to your audience and consistent with what you are trying to convey through the report.

- Whether you report a broad array of measures (e.g., patient experience, patient safety, clinical outcomes) or a narrow set that focuses on one disease and/or one aspect of quality (e.g., clinical processes for diabetes care) depends on your goals, your audience, and your resources.

To learn more, go to What Health Care Quality Measures Will You Report?

Questions and Tasks

☐ What does your audience want to know about the care from the subject of your report?
Type your response here.

☐ Identify a source of standardized measures for the subject of your report.
Type your response here.

☐ What aspects of the subjects' performance are typically reported to consumers? Which measures are designed to meet the information needs of consumers?
Type your response here.

☐ Which measures can you report?
Type your response here.

- Which measures will your partners (if any) endorse?
Type your response here.

- Which measures will the subjects of your report endorse?
Type your response here.

- For which measures are data available at an acceptable cost?
Type your response here.

☐ Will your report include a broad or narrow range of measures? List your reasons for making this decision.
Type your response here.

☐ List the measures that you have chosen for your reporting project.
Type your response here.

☐ How well do the measures support the message you wish to convey to your audience?
Type your response here.

Plan Your Reporting Project: Decide on Your Role

Questions and Tasks

☐ Do you have enough information to help you decide your role in producing and disseminating your report card? If not, what information do you need?
Type your response here.

☐ Outline all the steps required to create your quality report. Does your organization have the desire and resources to accomplish all the tasks you have identified?
Type your response here.

☐ What are the advantages of producing your own report? The disadvantages?
Type your response here.

☐ Does the information you would like to communicate to your audience already exist?
Type your response here.

☐ If you could repackage someone else's information, whose information would it be and what would it take to get access to it? What are the arguments for and against this strategy?
Type your response here.

☐ Would it be appropriate and useful for your organization to point to other sources of information rather than providing the data yourself? What are the arguments for and against this strategy?
Type your response here.

Plan Your Reporting Project:
Determine How to Pay

Key Points

- The costs for your reporting project depend mostly on the scope of the report and your goals as the sponsor. It is important to draft a budget for your reporting project that is based on a good understanding of all the work involved and realistic projections of the costs.

- One common and effective strategy is to approach health plans or providers to fund parts of the project, as they will benefit from seeing the comparisons of their own performance to that of their competitors.

- You may be able to limit your financial expenses significantly by partnering with major purchasers, government agencies, and/or foundations in your community. To learn about the benefits and challenges of partnering with other organizations, go to Find Potential Partners.

To learn more, go to How Will You Pay for a Health Care Quality Report?

Questions and Tasks

☐ What are the costs associated with the project as you currently envision it? Account for all the major and minor functions required to produce your reporting project. (Review a list of budget categories.)
Type your response here.

☐ Is your organization prepared to bear the financial burden of the project? Identify sources of funding or in-kind services within your organization. Note obvious sources as well as potential ones that could be tapped in the future.
Type your response here.

☐ Identify all the local health plans and providers who will benefit from this reporting project. Devise a plan to approach them for funding and keep track of their responses, since you may want to contact them again after the project is up and running.
Type your response here.

☐ Note potential sources of funding in your community (i.e., beyond plans and providers). Create a contact list, assign responsibility for outreach, and keep track of responses.
Type your response here.

Plan Your Reporting Project:
Manage the Project

Key Points

- A realistic schedule will help you accomplish your objectives. The schedule should ensure that useful information is provided on a timely basis and work is carried out efficiently.

- Everyone involved should be clear on the management structure and who is responsible for what, and when. If you have partners involved in this endeavor, it is important to establish who has the ultimate decisionmaking authority.

- If you are reporting information for the first time, plan to get feedback from the subjects of your report before making the data public. Be sure to include time for reviewing and refining the contents of your report with them.

To learn more, go to How Will You Manage a Health Care Quality Reporting Project?

Questions and Tasks

☐ Develop a realistic schedule for your reporting project. Be sure to consider the following:

- Will this schedule allow you to meet all your objectives?
  Type your response here.

- Does it include all the major steps in your project, including testing with consumers and feedback from stakeholders, providers, and/or health plans?
  Type your response here.

- Will this schedule allow you to deliver information to your audience in a timely manner so that it is viewed as relevant?
  Type your response here.

- Have you accounted for the time that will be needed to review and refine the content of the report?
  Type your response here.

- Have you accounted for situations that may slow your progress?
  Type your response here.

☐ Do you have the staff and the leadership in place to get the work done?
Type your response here.

- Note the names of the people who will be leading and staffing the project.
  Type your response here.

- Identify the 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).
  Type your response here.

- If you have one or more partners, have you established who will have the ultimate decisionmaking authority?
  Type your response here.

Plan Your Reporting Project:
Gain Trust of Providers

Key Points

- It is important to have the cooperation and trust of the entities you are reporting on to make the process less burdensome and more valuable to everyone involved.

- To earn the support of providers and/or health plans, consider them as one of your key audiences. Include them in your planning process and give them the opportunity to review the data before they are made public.

- You can build credibility as a report sponsor by being transparent about your data collection and reporting methods and asking the entities you are reporting on for feedback on key issues (selecting measures, designing data displays, and so on) along the way.

- You may need to plan alternative strategies that are less dependent on the entities involved if it becomes too challenging to gain their cooperation.

To learn more, go to How Will You Gain the Trust of Health Care Providers or Plans?

Questions and Tasks

☐ What do you know about the entities whose performance you are reporting? Do you anticipate any resistance from them?
Type your response here.

☐ How do you plan to involve these entities in your reporting project?
Type your response here.

- Will you give them an opportunity to review your report and respond to their suggestions before making it available to the public?
Type your response here.

- How will you share your data collection and reporting strategies to build trust and credibility as a report sponsor?
Type your response here.

- How will you include them in your planning process so they are part of your team?
Type your response here.

- How will you elicit their feedback on relevant issues?
Type your response here.

☐ How will you proceed with your reporting project if the entities do not cooperate? Devise steps for dealing with entities that oppose the reporting effort.
Type your response here.

Plan Your Reporting Project:
Test Your Report

Key Points

- Testing of materials and strategies with your audience is a key step in the reporting process. This will tell you if the information in your report is meaningful and can be easily understood by your audience. It will also allow you to refine your materials and messages.

- Before you begin testing, be clear about your goals (e.g., to determine whether the audience is interpreting the data displays correctly). It is helpful to anticipate how you may be able to use what you learn to improve your report.

- Give members of your audience an opportunity to react to the materials and, if possible, plan on multiple rounds of testing so that you can get feedback on each round of revisions.

To learn more, go to [How Will You Test Aspects of Your Health Care Quality Report?](#)

Questions and Tasks

☐ What do you want to learn through the testing process?
Type your response here.

☐ List the things you'd like to test with your audience (e.g., messages, design elements).
Type your response here.

☐ Does your organization have resources for multiple rounds of testing and revisions?
Type your response here.

☐ Outline your plan for the testing process.
Type your response here.

- How will you select members from your audience for testing?
  Type your response here.

- What methods will you use to get feedback from your audience?
  Type your response here.

- Can you carry out multiple rounds of testing and revisions of the information in your report?
  Type your response here.

- How will you use what you learn to improve the report?
  Type your response here.

☐ Document your findings; note how the audience responded and how you can address any issues raised.
Type your response here.

Plan Your Reporting Project:
Planning for an Evaluation

Key Points

- Determining when and how you will assess the impact of your reporting project is an integral part of your overall project plan.

- Having an evaluation plan in the early stages of the project will enable you to create goals that are realistic and measurable. It will also ensure that you set aside the necessary funding and resources.

- As part of your evaluation plan, it is helpful to anticipate how you'll use what you learn to improve your report and the reporting process.

- Sharing your findings with other report sponsors is an important way to contribute to advancement in the field of quality reporting.

To learn more, go to How Will You Assess Whether You Achieved Your Goals?

Questions and Tasks

☐ List all of the ways in which you would like to measure the impact of your report (e.g., a change in the intended audience's awareness that this kind of information is available exists). Determine which goals are short or long term.
Type your response here.

☐ How will you 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 incorporate this into your project timeline.
Type your response here.

☐ Do you have the funding and resources needed to move forward with your evaluation plan? If not, can you obtain them? What are your alternatives?
Type your response here.

☐ How will you document what you learn from the evaluation?
Type your response here.

☐ How do you think you can use what you learn to improve your report and the reporting process?
Type your response here.

☐ How will you share the lessons you have learned with your partners? What can you do to share them with organizations external to your project?
Type your response here.