Executive Summary

This Learning Guide is intended to support population health performance management for those using electronic health data; it offers recommendations for choosing measures, collecting accurate and comprehensive data, and assessing program performance for successful population health management and improvement.

Step One:
Choose What to Measure

Performance measures should align with program goals to serve as a roadmap for progress and ultimate goal achievement. They should be relevant and meaningful, as well as scientifically sound to ensure validity, reliability, and credibility.

When possible, measures should build upon those already in place, syncing up with established data collection processes and workflows. This will help improve and expedite data collection and reporting activities. Measures should also be clear, easily used, and interpretable by partners and stakeholders.

Measure selection should also consider the timing of selection, pragmatism, and the benchmarking approach.

- Choose measures early in the process to take advantage of valuable data collection opportunities.

- Keep feasibility in mind. More is not necessarily better when it comes to measures.

- Establish what you want to benchmark. This will support performance goals that are both ambitious and achievable in the desired timeframe.

If time and resources allow, collect and analyze preliminary data to confirm both the utility and feasibility of using the measures selected, test associated processes, and support planning for reporting. Even testing a subset of measures is useful as it makes it easier to spot needed changes for measurement, data collection, or calculations early in the process. Additionally, visualizing a final product of the measure development and data collection efforts, such as a mock-up of the final report data, can engage and motivate stakeholders – empowering them to address concerns at the outset.

Step Two:
Ensure Quality Data

The collection of performance measurement data can be challenging for multiple reasons, including lack of data source reliability or collection issues, both of which can hamper efforts to assess improvement beyond baseline. Engaging program staff in baseline performance analysis and data collection process review can facilitate complete and accurate data collection, and support troubleshooting and reporting efforts.

Other components to inform the data collection process include implementation of standardized data collection processes (e.g., data capture through verbal communication, paper forms, electronic systems); use of structured versus unstructured (e.g., free text) data; and workflow.

Consideration of the properties of discrete data elements is also important:

- *Unstructured data* are useful for collecting subjective, unusual, or explanatory information, and require coding for ultimate use.

- *Structured data* are collected in a more standardized manner, have limited response options, and analysis and reporting can be less burdensome.

Paramount, however, is the fidelity of a given approach and structure to assessment of a discrete measure, and the collection of measures considered in a given program.

Successful data collection also requires an understanding of where and how those components fit into the overall workflow. For example, using existing data fields increases the likelihood of use. While testing the data collection process and integrating it into the workflow can be iterative and challenging, it serves to identify common errors and help avoid long-term problems. Documenting the data collection process is also critical to keeping data quality high and supporting continuous learning.

Step Three:
Calculate Performance

Performance measures are operationalized using calculations that quantify the degree to which the measures are achieved. Calculating performance from the beginning is critical, as it provides an opportunity to refine measures and improve data collection, as well as know where performance stands at baseline.

Program calculation should be informed by many factors, including:

- Assessment of calculations currently in use.

- Configuration of reports that specify performance measure definitions (translated from source systems as needed) and data needed to perform necessary calculations.

- Documentation to ensure that revisions to calculations and their electronic configurations are captured.

Putting it All Together

Regardless of where you are in the process, troubleshooting and iterative review supports constant focus on goals and helps with early identification of problems. Documentation of workflow and any changes to the data collection process support future troubleshooting (especially in the event of program staff changes) and make the overall process more efficient.

The iterative nature of performance improvement also heightens the importance of continuous stakeholder engagement. Working through this guide with key partners can support a shared understanding of program measurement needs, measure selection, data collection and analysis; ultimately, we hope this guide helps to support development of a meaningful and useful reporting approach.