



Changing-Creating-Connecting-Coordinating

Introduction: Building and Utilizing your Data Strategy for Organizational Success

Community Healthcare Association of the Dakotas

9.15.21

Poll Question #1

- How would you describe your organization's current state of data?
 - We have more data than we need or are able to utilize?
 - It is difficult to get accurate data consistently so we do not utilize data as much as we should
 - We have the data we need and we utilize it effectively
 - We have the data we need but we do not use it effectively
 - Other:



Poll Question #2

- My health center has a formal data strategy that works well
- My health center has a formal data strategy that does not work well
- I am unclear what a data strategy is
- Our organization needs to better understand what data is needed and how to use it

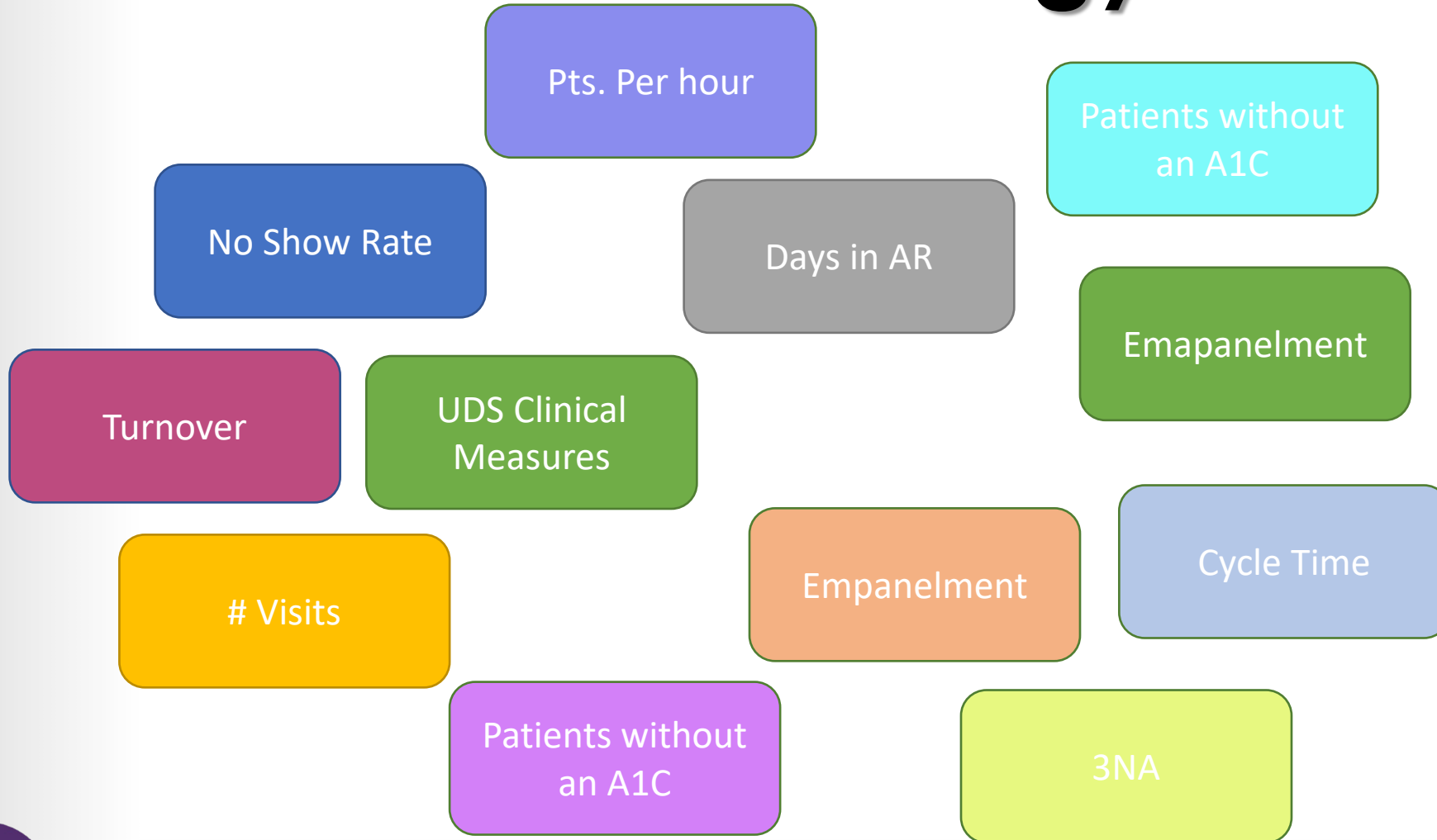


Objectives

- Participants will understand the role of a data strategy in health center performance
- Participants will understand the 7 critical steps to building an effective and sustainable data strategy
- Participants will be introduced to the proposed curriculum for a Data Strategy workshop series
- Participants will participate in an interactive needs assessment for participating in a data strategy workshop



What is a Data Strategy



- A data strategy **helps by ensuring that data is managed and used like an asset.** It provides a common set of goals and objectives across projects to ensure data is used both effectively and efficiently

Why Talk Data Strategy- Azara

- Do you know what you want from Azara?
- What do you expect Azara to help you with?
- How will you maintain Azara?
- How will you use Azara vs. other systems?
- Who will use Azara and why?
- How will you prioritize opportunity within Azara?
- What is your stewardship process?



Why Talk Data Strategy Now?

- Creating your data strategy now will...
 - Optimize your implementation of Azara
 - Improve your satisfaction with Azara
 - Result in quicker utilization of Azara
 - Developing your Azara strategy
 - Reduce wasted cost/resources
 - Drive your population health strategy



A Data Strategy Addresses the 5Ws

- **Who**: Who is responsible for:
 - Collection of data
 - Data capture
 - Retrieval of data
 - Reporting of data
 - Utilization of Data
 - Monitoring of data
 - Influenced by the data
- **What**: What is the data:
 - Used for
 - Needed for
 - Telling us
 - Expected to show
 - Data is needed
- **Where**: Where:
 - Does the data come from
 - Does the data get used
 - Is the data influenced
- **When**: When is the data:
 - Collected
 - Utilized
 - Changed or influenced
 - Relevant
- **Why**: Why does the data:
 - Serve a purpose
 - Look like it does
 - Is the data shared

What is the Purpose of Data

- Data collection enables a person or organization to answer relevant questions, evaluate outcomes and make predictions about future probabilities and trends.
 - Accurate data collection is essential to maintaining the integrity of research, making informed business decisions and ensuring quality assurance.



What Should be Your Data Strategy Statement

The health outcomes of a population (**population health**) are driven by interventions (**population health management**) such as **Patient Centered Medical Home** concepts aimed to deliver upon improved outcomes, decreased cost, improved patient experience and provider experience (**Quadruple Aim**).

The measured impact on the **Quadruple Aim** determines your **value**.



Health Center: Key Data Categories



Compliance



Financial



Clinical



Operational



Perspective



Discussion

- What data do you have available to you for these categories?
- How are these data points utilized to drive change?
- Which data points do you have available but are not utilized?
- Which data do you want that you do not have available?



Creating Value from Your Performance



PERFORMANCE

- Collecting
- Analyzing
- Reporting



QUALITY

- Influencing
- Evaluating
- Demonstrating

Quality of Performance





Value Based Equation

Efficiency
(Population Health
Management)



Effectiveness
(Population
Health)



Quality

Cost



Outcomes
Patient Satisfaction
Provider Satisfaction



Value

Data and Analytics

- **Data**: “Facts about something that can be used in calculating, reasoning, or planning”
- **Data Analytics**: “The process of examining data sets in order to draw conclusions about the information they contain, increasingly with the aid of specialized systems and software”
- You can have data without information but you cannot have information without data



Common Barriers to Data and Analytics

- Lack of Data Strategy
 - What is your data purpose?
- HIT Infrastructure
 - Where is your data coming from?
 - How is your HIT set up?
- Understanding and Awareness
 - What does that data mean?
 - What does that data mean to me?
 - Where is the data?
- NOT Informative Data
 - Does not answer the question why?
 - Does not drive conversation and progress



Data and Analytics- Readiness

- Define Organizational Value
 - Are you data drunk?
 - Are you data void?
- Create your Data Strategy
 - What is your value based vision
 - How are you measuring progress?
- Create Interdepartmental Alignment
 - Are your KPIs competitive?
 - Are your goals complimentary?
- Establish your Data Team
- Promote Engagement
 - Who uses the data?
 - Does the data move?



Strategies for Addressing Barriers to Data and Analytics

- Define Organizational Value
- Create your Data Strategy
- Create Interdepartmental Alignment
- Establish your Data Team
- Promote Engagement



The 7 Steps to a Data Strategy

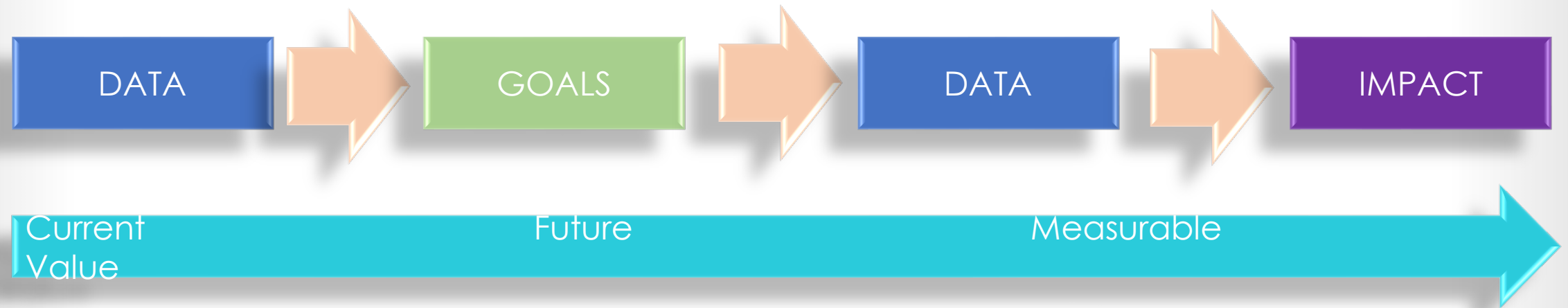


Create your Data Strategy

1. Leadership Sponsorship
2. Defined Goals
3. Data Housing
4. Information Management and Governance
5. Data Centralization
6. Change Management
7. Defining Value



Data in Healthcare



Step 1: Leadership Sponsorship

- Create a data-rich culture
 - How is your organizational strategy defined?
 - Are you positioned to develop SMART Goals?
 - Invest in the right people and processes
 - Do you have the skill set and resources to plan, collect, manage, analyze, and communicate?
 - Communicate using data
 - Are your leadership meetings data driven?



Promoting Engagement

- Use your strategic plan
- Define the value expectations
- Where are you investing and want to see an ROI?
- Non-compliance purpose focus

**PCMH is not the Goal, it is the Strategy...

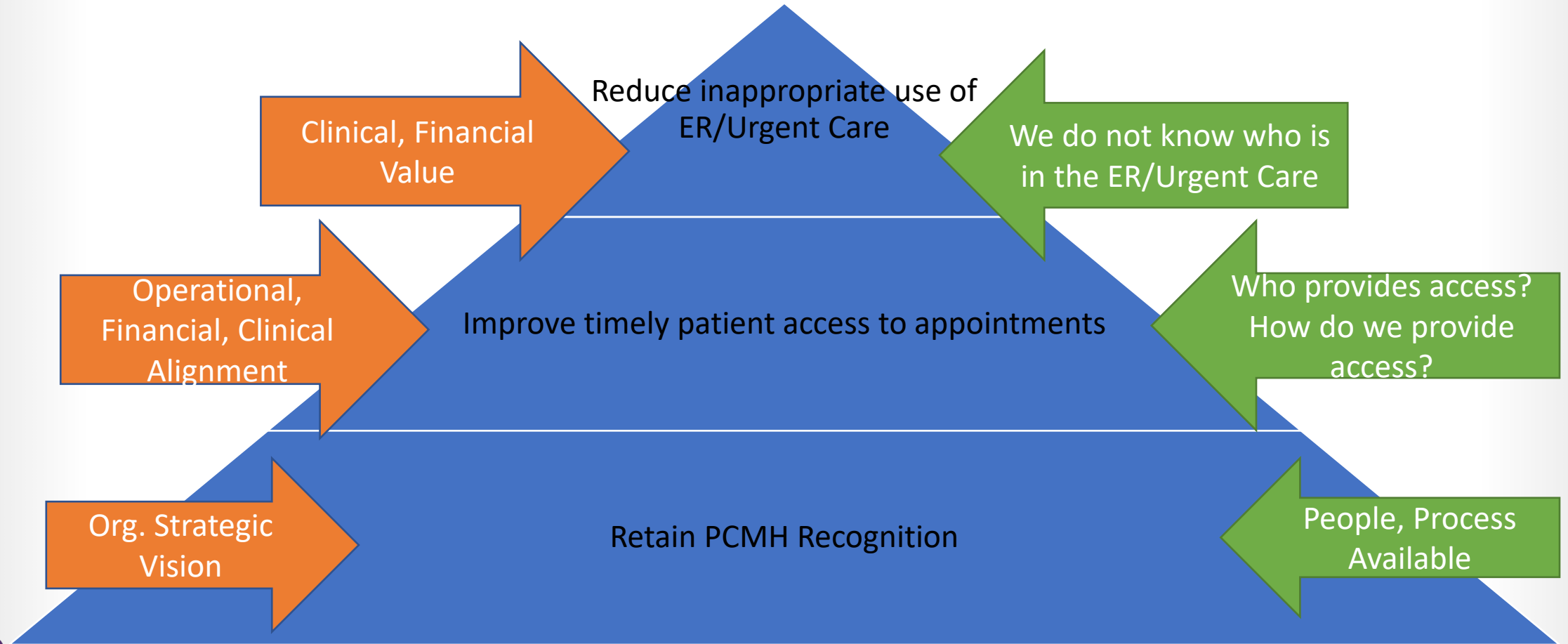


Step 2: Defined Goals

- Establish the goals that deliver upon your strategic vision
- How do you define value for these goals?
- Where is there inter-departmental value?
- Divide your goals: “crawl, walk and run”
- Where is your expertise?



Goal Development



Aligning Priorities

- By understanding data sets, we can begin to successfully align priorities and drive a model of clinical, operational, and financial excellence.
- We can align priorities when we are able to answer...
 - What are we measuring?
 - Why are we measuring it?
 - How do the data sets vary?
 - How do the data sets overlap?

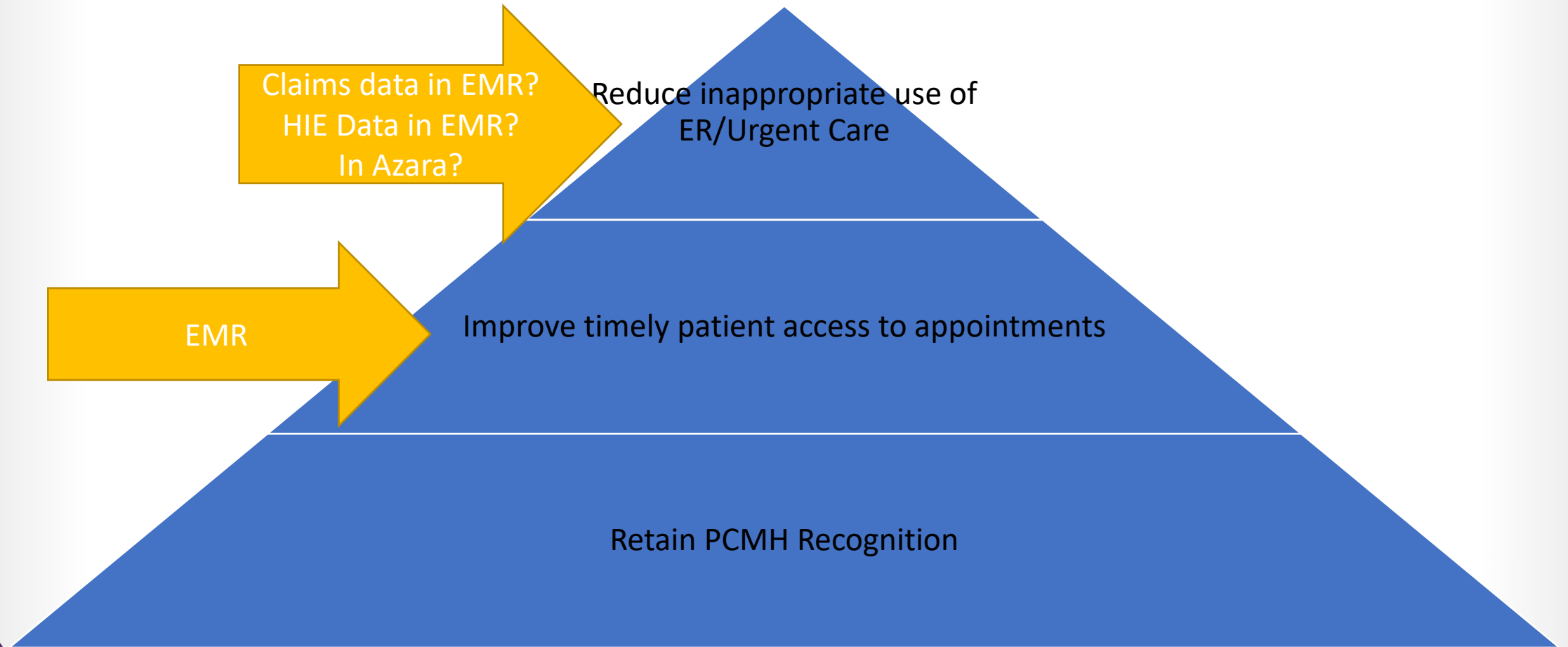


Step 3: Data Housing

- Where does your data live?
 - What data lives there?
 - What data cannot live there?
 - What limitations does this cause for us to define value?



Data Housing



Step 4: Information Management and Governance

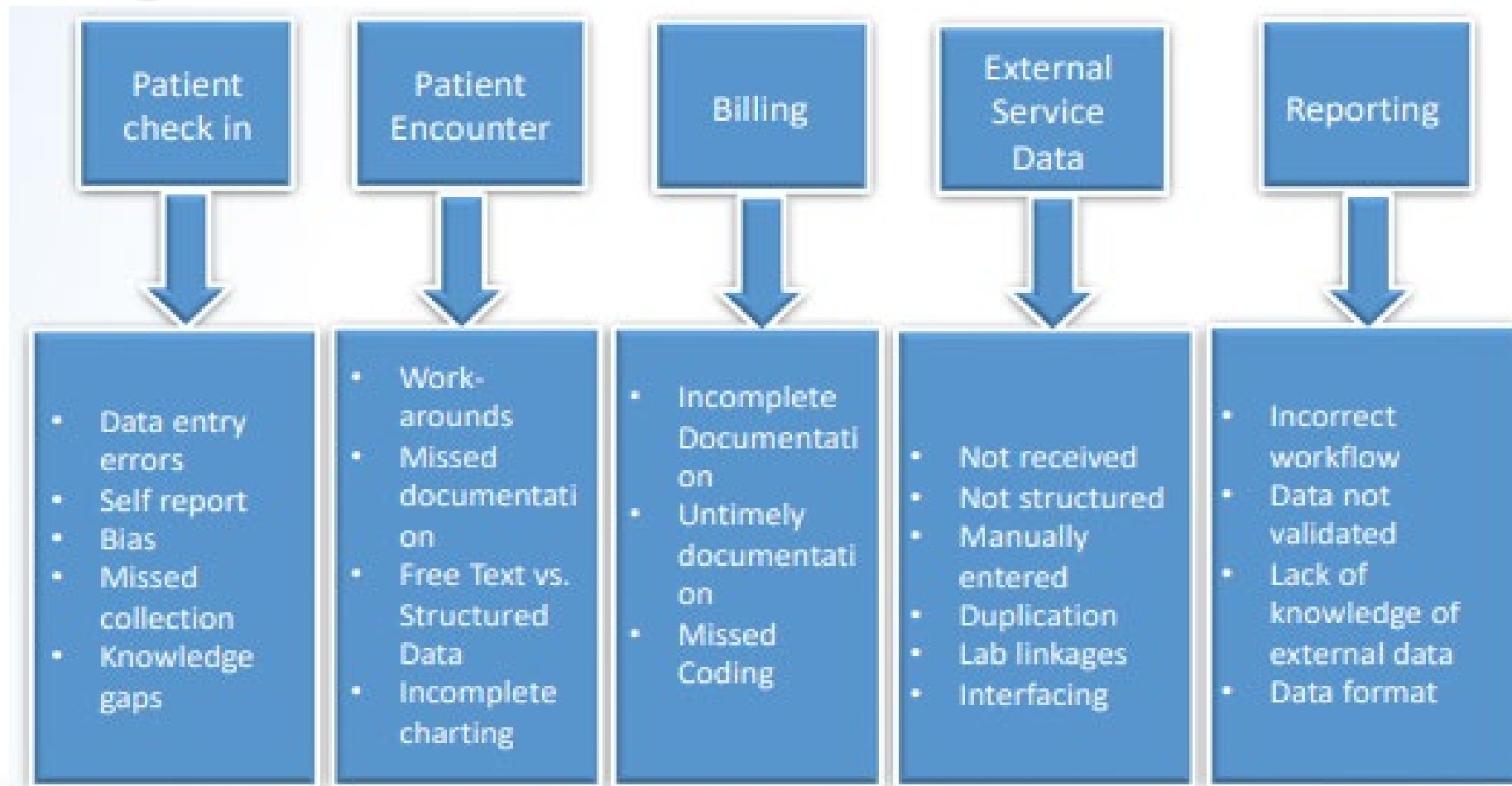
- Profile your data prior to data integration (step 3)
 - Define
 - Assess
 - Collect
 - Correct
- Create your accountability plan
 - Data validation
 - Consistency
 - Accountability



Proactive Profiling

Data Profile	Definition	Assessment	Collection	Correction
Timely Access	Days between request appt. date and actual appt. date	EMR changes appt. create date if appt. is edited	Practice Management: Scheduling	Adjusted workflow for editing appt.
ED Utilization	Patient has visited the ER (regardless of source of referral)	Data not structured unless ED F/U Visit appt. used	Scheduling Reason for Visit. Do not currently have access to queriable ADT information or patient provided information	Create structured field for indicating ED visit and date

'WHERE' Data & Reporting Can Go Wrong



Governance and Accountability

- Post Integration Accountability

Profile	# Audited	# Compliant	Action Plan	Impact on Value
Timely Access	20	19	NA	Insignificant
ED Utilization	20	15	HIE Connectivity	Significant

Do We Really Have a 'Data Team'?

- Does your IT staff represent clinical or operational depts?
 - NO? – then IT is not your “Data Team”
- Are your Clinical & Operations staff familiar with your IT systems?
 - NO? – then Clinical & Operations staff is not your “Data Team”
- Does your Executive Team know where your essential data resides? (ie: where your 330 Data comes from)
 - NO? – then the Executive Team is not your “Data Team”



Do We Really Have a 'Data Team'?

- Is your QI/PI Director skilled in IT/Data
 - NO? – then your QI/PI dept is not your “Data Team”
- Do any of the people on your “Data Team” DO the work that results in your data?
 - NO? – then you DO NOT have a “Data Team”
- Who are we forgetting that is essential to the team???
 - **THE PATIENT!**



'WHO' is on Your Data Team?

- Non-Clinical:

- Registration
- Check In/Check Out
- Operations
- Finance
- Leadership
- IT/Informatics

- Clinical:

- Medical Assistants
- Nursing Staff (RN's, LPN's)
- Care Managers
- Care Coordinators
- Medical Providers
- Behavioral Health Providers
- Dental Providers
- Dental Hygienists/Assistants
- Operations
- IT/Informatics



Step 5: Data Centralization

- Create trust through minimalization
 - People
 - Who is your data team?
 - Financial analysts = operational analysts = clinical analysts
 - Systems
 - Beware of shiny new solutions
 - Plan for long term value not short term fixes
 - Create consistency between departments
 - Do not allow for system hoarding



Step 6: Change Management: IT

Training

Who manages the system?
Who uses the system?
What is the purpose of the system?

Engaging

What is the value for me?
When should I use it?
How do I use it?

Optimizing

How does it create efficiency?
How is it effective?
What value is it providing?



Change Management: Data

Observing

Is the data captured?
Is the data available?
Is the right person getting the right data?

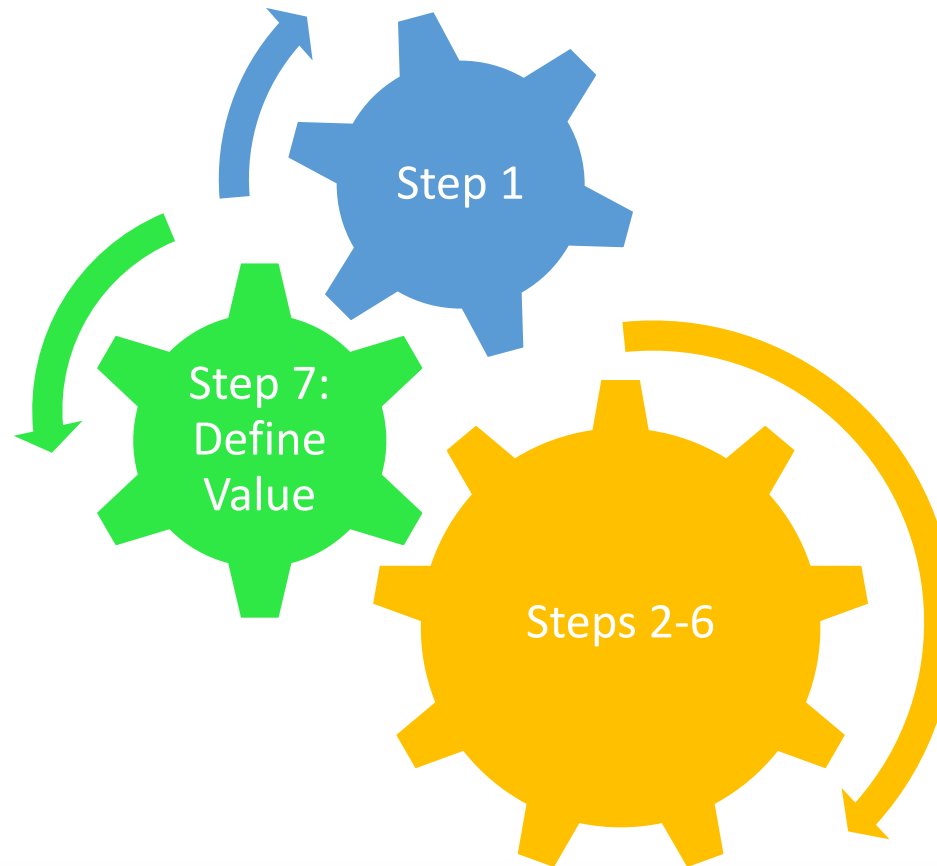
Measuring

What does the data tell us?

Changing

What is the plan?
What is the expected outcome?

Step 7: Defining Value



Stating Value

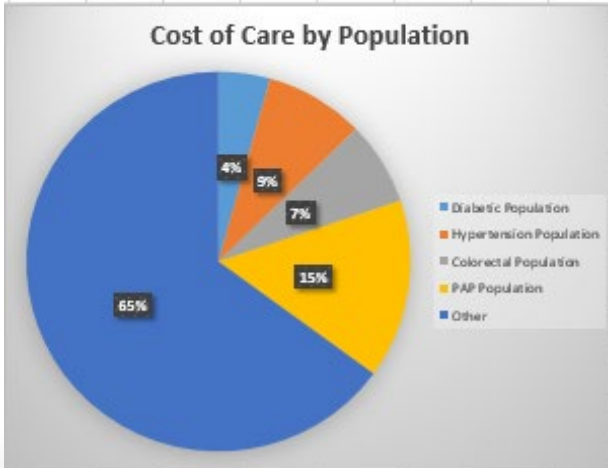
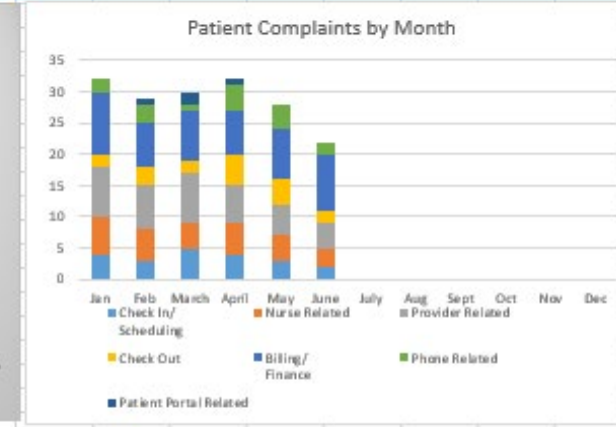
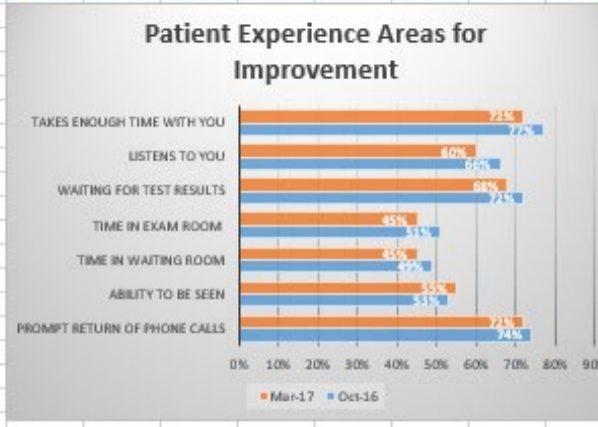
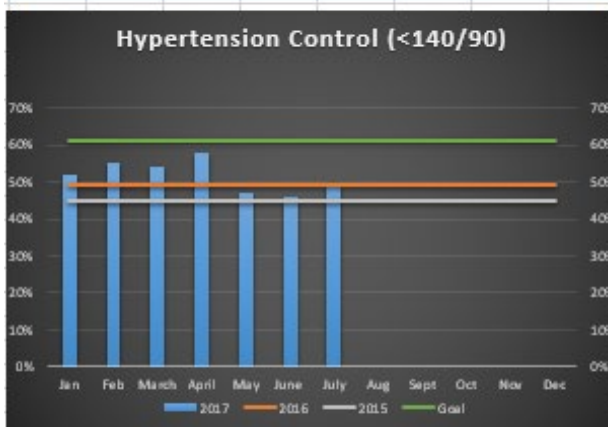
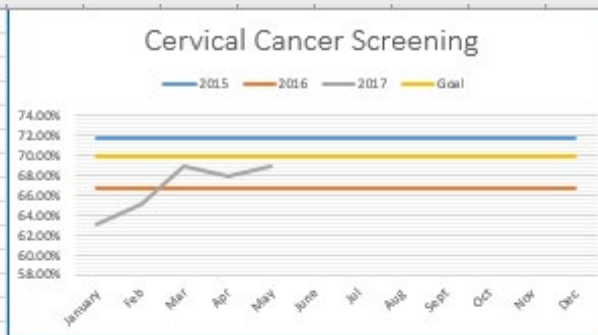
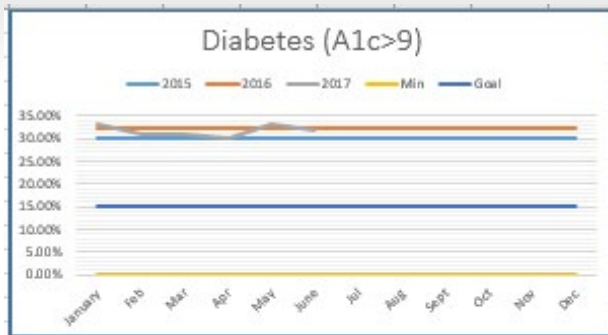
Leadership: Capturing and measuring ED data led to improved utilization of TOC nurses as alternative access, decreasing inappropriate utilization by 10% and improving access to providers due to decreased need for ED F/U visits

Staff: Implementation of new workflow created opportunity for enhanced TOC Management and resulted in decrease of inappropriate ED Utilization by our patients

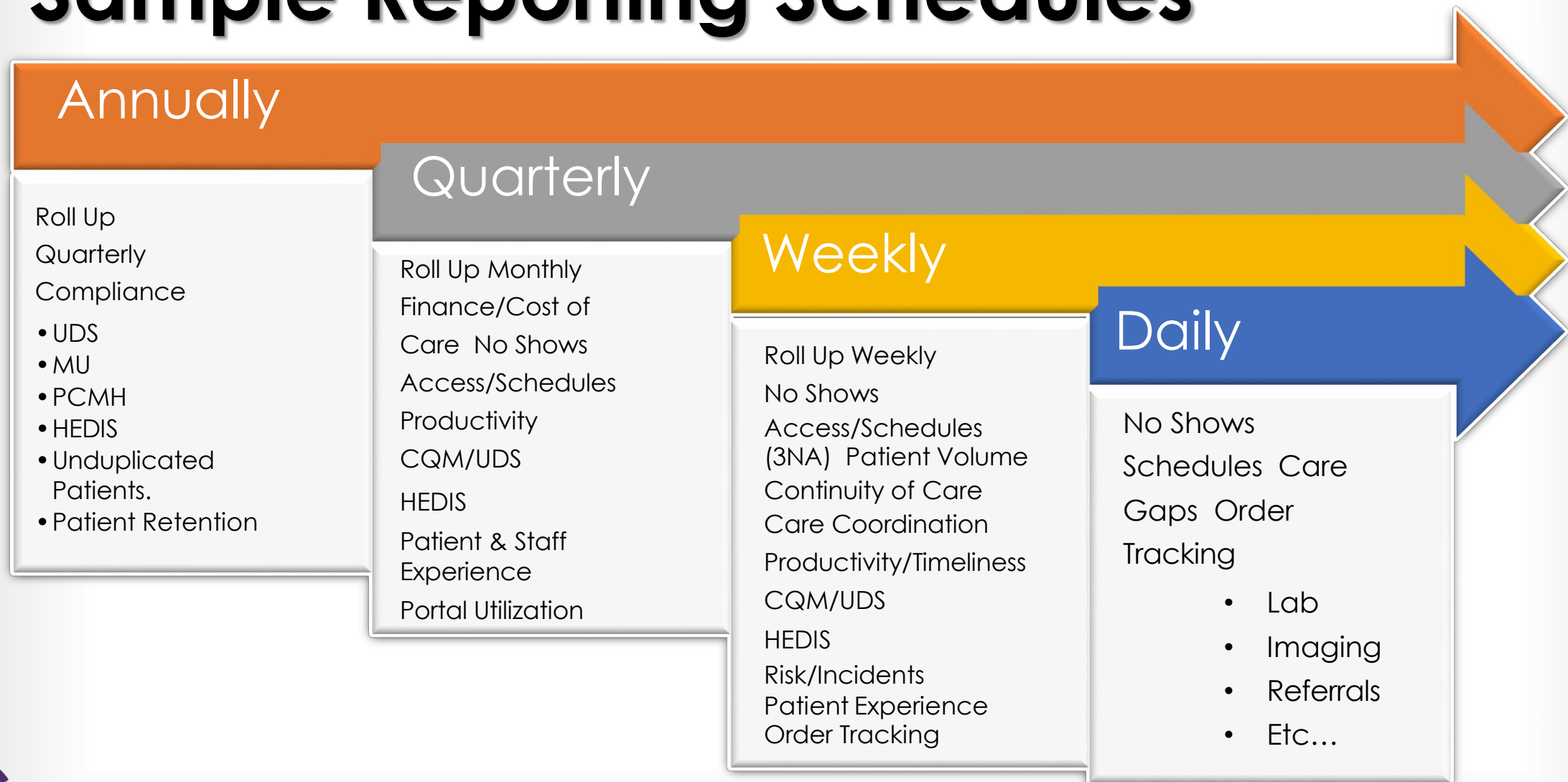
Patients: Proactive outreach by TOC nurses provided less expensive and timely access to provider. I am more satisfied







Sample Reporting Schedules



Self Needs Assessment

- Do you have more than 8-10 priority measures for the organization?
 - Do the priority measures create competitive allocation of resources or outcomes?
 - Do the measures have aligned definitions of elements?
- Can you tie your data to an organizational or other strategic goal?
 - Is your data relevant to a strategy or task?
 - Is the utilization of data relevant to it being a strategy or task?
 - Is the audience of the data appropriate to it being a strategy or a task?
- Do you know the expected outcome of collecting, monitoring and influencing your priority measures?



Self Needs Assessment

- Who is your data team?
 - Is your data team comprised of cross-departmental representation
 - Does the team include a cross section of data-in and data-out roles?
- Has your data team identified the gaps in meeting the data strategy of the organization?
- What is your data stewardship procedure?
- How does your systems infrastructure support the continuous, proactive utilization of data?



Self Needs Assessment

- Are mid-management and front-line staff involved in setting your data strategy?
- Has your data strategy resulted in:
 - A series of change management plans
 - Expected outcomes that demonstrate value for the organization or other stakeholder?
- Is the data utilized:
 - Effectively?
 - Proactively?
 - By the appropriate audience?
- Does the use of data promote:
 - Efficient use of resources
 - Improved collaboration and teamwork
 - Mutual purpose
 - Productive meetings
 - Prioritization of work



Self Needs Assessment

- Are your systems optimized?
- Is there redundancy between systems?
- Do the right people have access to the right systems?
- Is there data that you want that you do not have access to?



Data Strategy Curriculum

- If you identified an opportunity to improve on:
 - Data availability
 - Data prioritization
 - Data utilization
 - Data collection or availability
 - Engagement in data
 - Influencing data
 - Discussing data
 - Building skill sets with using data



Data Strategy Curriculum

- This workshop will provide health center staff with the resources essential to building data strategies that result in improved performance and achievement of organizational goals. The workshop will be an interactive series comprised of learning sessions, work development sessions and opportunities for sharing progress and seeking assistance. Participants will be responsible for completing assignments between sessions to ensure the development of a useable data strategy by the end of the workshop series.

POLL #3: How would you like this curriculum delivered?

- In person at your health center
- In person conference format as a group
- Webinar/Office hours format





POLL #4: When would you like to start developing your data strategy?

- October 2021
- November 2021
- December 2021
- January 2022
- February 2022
- March 2022
- April 2022
- May 2022
- June 2022



Next Steps

- Determine mode and timing of Data Strategy Curriculum
- In preparation of Workshop:
 - Identify your data strategy workshop team
 - Review your organizational and strategic plans

