



Job Aid: Practice Assessments and Surveys

Overview

Practice assessments and surveys are simple and non-threatening ways for a practice to gather information, generate ideas for improvements, and test and monitor improvements.

Practice Assessments

You can use practice assessments to:

- Help a practice reflect on their processes of care, quality improvement (QI) infrastructure, patient experiences, and joy in work, and generate improvement ideas.
- Evaluate improvements on the specific domains measured by the assessment.
- Get to know a practice and their goals and priorities.

See the resources section for a list of commonly used practice assessments.

Conducting a group rating session

Assessments can be completed either individually or in a group. In general, group sessions provide the better opportunity for rich discussion and idea generation.

1. Prepare for the session.

- Include diverse participants in the session.
- Orient them to the assessment and why you are using it.
- Have participants complete the assessment (you can ask them to do this before or during the session).

2. Encourage discussion of each item.

- Establish ground rules for discussion:
 - There are no right or wrong answers.
 - Differences of opinion lead to useful discussion.
- Ask each member how they would like to rate the item and their reasons for the rating.
- Speak up if you think the practice is under- or over-rating themselves.



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3. Promote consensus.

- When there are differences in ratings, ask members to review the rationale for their ratings, and check whether anyone wants to revise their rating.
- Use a "parking lot" for items that the group can't come to consensus on and revisit in the future.

4. Connect results to improvement goals.

- Point out items that align with the practice's current goals and priorities.
- Ask the practice whether it wants to set improvement goals based on the results of the assessment.

Surveys

Use custom, standardized, and visual surveys to:

- Gather information from staff and clinicians about their thoughts and attitudes about a particular problem or proposed change.
- Generate ideas for improvement in areas like patient experience or joy in work.
- Measure the impact of a change a practice is testing.
- Monitor improvements over time.

Creating a custom survey

Step 1. Choose the topic.

- What does the practice want to measure or gather input on?

Step 2. Decide who should complete the survey.

- Who can provide the information the practice needs?

Step 3. Develop the question-and-answer sets.

- Limit the length of the survey to increase response rate and reduce burden.
- Use simple language.
- Avoid double negatives and "double-barreled" or compound questions.
- Make sure the wording of questions doesn't suggest a "right" answer.
- Use multiple choice questions and rating scales to get uniform reactions you can tabulate.
- Use "open-ended" questions to gather detailed feedback.
- Make sure questions fit the language and reading level of the respondents.



Step 4. Distribute the survey.

Methods include:

- By mail
- Email link to survey
- SMS (text message) link to survey
- Paper surveys administered at practice.

Consider:

- How each method will impact accessibility for particular groups and the response rate
- Willingness of individuals to be honest.

Step 5. Pilot the survey.

Reflect:

- Is the information generated useful and actionable for the practice?
- Did the respondent understand the questions?

Modify items based on pilot.

Step 6. Implement the survey.

- Decide how many responses you need, recalling that this is QI work, not research.
- Distribute and collect surveys.
- Enter and analyze the data.

Standardized surveys

Standardized surveys are ready-made and often let you compare to other practices or groups. Check with your practices to see which standardized surveys they are already required to use by health plans and other agencies, like the Clinician and Group Consumer Assessment of Healthcare Providers Survey (CG-CAHPS®).

Visual surveys

Use visual surveys to gather informal, single-item feedback quickly from patients or staff.

Simple methods include:

- Rating satisfaction using colored marbles in a jar
- Indicating attitude about a change using check marks on a white board



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Displaying and Interpreting Assessment and Survey Data

1. Use simple tables, bar graphs, or top box graphs (presents N and percentage for only the top rating option) to display survey results. Show raw numbers in addition to percentage for sample sizes smaller than 100.
2. Include information on methods (who distributed to, how collected, response rate) and note any factors that might have introduced bias such as low response rate by certain groups, etc.