Job Aid: Presenting Performance Data

Overview

Presenting performance data to a practice in a way that facilitates meaningful action is an important part of quality improvement and an essential activity for a practice facilitator.

Displaying Performance Data

Depending on the type of data you are working with, there are many different ways to present performance data, including using raw numbers, tables, bar graphs, run charts, and small multiples.

Simple summary with raw numbers

Use when presenting results that include 10 or fewer patients, like in a "last 10 patients" chart audit.

Always present data for 100 or fewer cases using raw numbers, even if you also use percentages, so the audience is able to interpret the results accurately.

Unhealthy Alcohol Screening

"Last 10 Patients" Chart Audit Summary

7/10 patients had current unhealthy alcohol screening results in chart

3/10 patients did not have current unhealthy alcohol screening results in chart

- 1 had never been screened
- 2 had screenings more than 24 months ago

Tables

Choose tables when you need to present several performance measures at once and show precise values. Keep tables small so each table is easy to read and understand.

Enhance tables by using colors to alert the audience to areas that need attention, like traffic signal colors - at target (green), at risk (yellow), and below target (red). Add spark lines to show data trends within a table format.
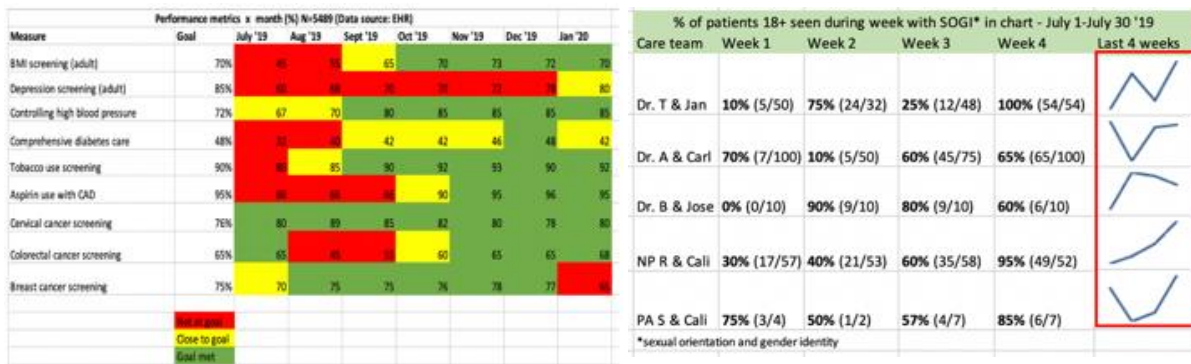
Bar graphs

Use bar graphs to compare performance across different groups. Stratify by the variable you are comparing: team, time, patient characteristics, etc.
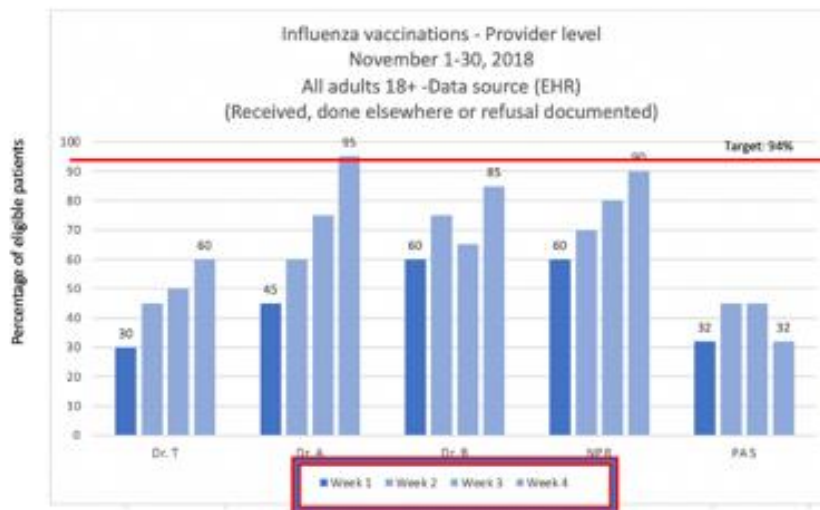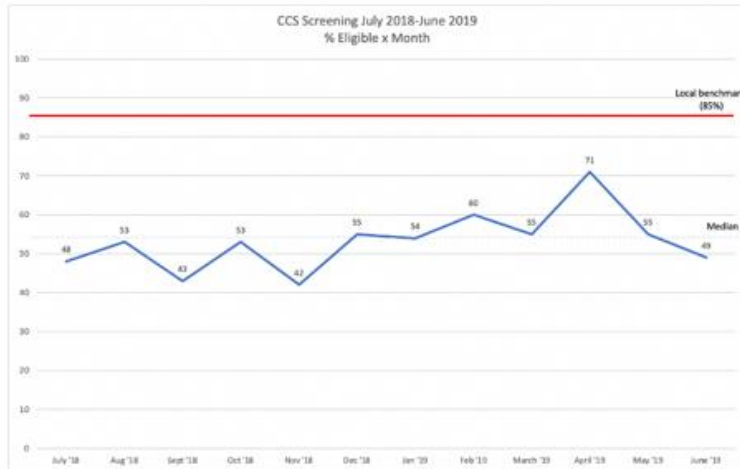
Run charts

Run charts are one of the most helpful tools for visualizing performance data. Use them to help a practice identify variation in their performance over time and explore reasons for it.

	July -Sept '18	Oct-Dec '18	Jan-Mar '19	April-June '19
Average CCS rate per quarter	48%	50%	56%	58%

5 Steps to creating run charts

Step 1. Gather data and create a title for the chart.
- Start with a minimum of 10 data points over a standard time increment.
- Include in the title the measure being presented, the time period, and the data source.

Step 2. Draw and label axes.
- Label Y-axis with what the practice is measuring (Ex: SOGI collection from adult patients).
- Label X-axis with the time period (Ex: Week 1, Week 2, Week 3...).

Step 3. Plot data points and connect them.

Step 4. Calculate median and draw median line.
- Median: the point at which 50% of the cases fall above and 50% fall below the value.
- Mark the median with a horizontal line.

Steps for finding the median:

Odd number of values	Even number of values

Odd number of values
1. Arrange data points in chronological order.
2. Divide the number of data points by 2 and round up.
3. Go to that data point – the one in the middle.
4. This is the median.

Even number of values
1. Arrange data points in chronological order.
2. Divide the number of data points by 2.
3. Go to that data point.
4. Add it to the data point in the next highest position.
5. Divide by 2.
6. This is the median.

Step 5. Add important events, targets, or benchmarks.
- Show where particular events occurred that might have a positive or negative impact.
- Highlight any patterns worth discussing.

Run chart patterns

Look for:
- Trends: 6+ consecutive data points all going up or all going down.
- Shifts: 6+ consecutive data points that are all below or all above the median.
- Outliers: Dramatically different data points suggesting a specific cause.
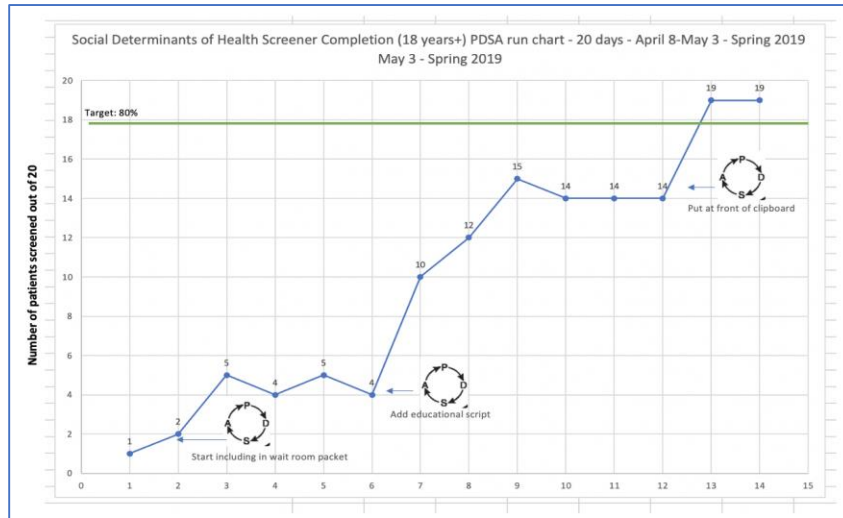
Use run charts to track changes across PDSA cycles.

Include labels that show when specific changes were implemented. This makes it easy for a practice to track progress and see the impact of refinements they make in successive cycles.

Small multiples

Use small multiples when there is too much data to present clearly on a single graphic or table. All charts should share the same elements: size, measures, or scale to make it easy to learn the "rules" and then read. Place the charts in logical order, for example, by time or geography. Identify possible "exemplars," as well as areas that need support.
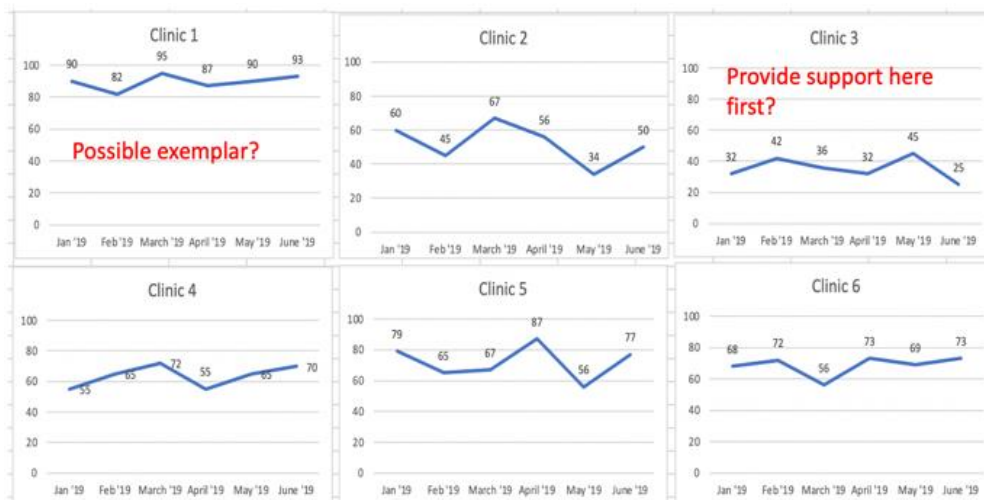
Presenting Performance Data

Here are 8 strategies to help you presenting data to a practice.

Strategy 1. Relate the presentation to the practice's goals.

Helpful questions to ask yourself as you are preparing data presentations:
- How do these data relate to the goals the practice has identified as their priorities?
- What do they say about progress towards those goals?
- What story are the data trying to tell?
- What is the best way to summarize these data to tell that story?
- How can I make the data come alive with a real-life example?
- How can these data be used to inform and support action towards the practice's goals?

Strategy 2. Check whether data reflect changes in care, documentation, or both.

Be clear on whether changes in the data reflect changes in actual care, changes in documentation of care, or a combination of both. Ask questions to find out.

Strategy 3. Give details on data and methods.

Start your presentation with a description of methods. Include basic information on your slides:
- Data source, all the way down to what section of the EHR data were pulled from
- Time period
- Inclusion criteria
- Definitions of denominators and numerators (with exclusion rules)
- Name and source of performance measure formula, if standardized measure.

Strategy 4. Get to the point! State conclusions directly.
Use descriptive titles that include the conclusions rather than generic titles like "Results" or "Findings." Ex: "CCS rate for past 6 months has stayed stable at Clinic A"

Use direct statements like:
- These data show...
- This graph suggests...

Remember to point out strengths when you display data. Don't just highlight problems.

Strategy 5. Prepare for data validity concerns.

Always expect the practice to question the validity of the data presented to them.

Tips for handling this:
- Don't get defensive. It's the data they're questioning.
- Listen. They are often right.
- Ask questions to learn more about their concerns.
- Help them confirm and/or fix the issues with their data yourself or with a data expert.

Strategy 6. Help the practice recognize the value of imperfect data and small data.

Many practices struggle with inaccurate and imperfect data. The 5 stages of grief is a useful framework for helping you understand a practice's reactions.

Stages of Data Grief
- **Denial**   These data are all wrong and we can't do anything.
- **Anger**   This is a waste of time. Stop bothering us until it is fixed.
- **Bargaining**   Let's wait until the data are all fixed before we do anything.
- **Depression**   This is hopeless. It will never be fixed.
- **Acceptance & action**   We wish we had perfect data, but we can start QI now using small data, like "last 10 patients" chart audits.

Strategy 7. Use questions to stimulate meaningful discussion.

Helpful questions to stimulate discussions about data.
- How accurately do you believe these data reflect your practice?
- What fits with what you were expecting?
- What is a surprise?
- How might this information help you with the goals you've set?
- Do these results conflict with data from other sources or reports?
- If so, why? Do they use:
  - Different denominators and numerators? Different time periods?
  - Different patient populations (for example, insured vs. uninsured)?

Strategy 8. Erect data walls.

Data walls are another way for the practice to interact with the data.
- o Make sure the practice has the interest and capacity to maintain it when you leave.
- o Start simple with one or two measures. Build from that.
- o Select a location for the data wall where staff and clinicians can see it easily.
- o Consider whether it should be visible to patients.
- o Use only aggregate patient data. Never include patient identifiers for confidentiality reasons.