

## Preparing for SB 1004 Metrics Selection Worksheet

### Stakeholder Inventory

In order to develop programs that are successful and have the capacity to grow, one important step is to ensure alignment of program aims and focus with those of key stakeholders, both internal and external.

#### STEP 1: Identify Stakeholders

Think about:

- Whose support is needed for success, sustainability, scaling?
- Whose initiatives/programs might be impacted (or threatened)?
- Who might have expectations about what the program will deliver or achieve?

Common groups to consider:

- Internal
  - Organizational leadership
  - Clinically-oriented
  - Financially-oriented
  - Regulatory
- External
  - Payer or provider partner
  - Referring providers
  - Community partners
  - DHCS

#### STEP 2: Make time to meet with key stakeholders

Based on the above considerations, we will prioritize meeting with the following groups/people:

- |    |    |
|----|----|
| 1. | 4. |
| 2. | 5. |
| 3. | 6. |

Suggested initial questions:

- What would a successful palliative care program look like?
- What are you hoping the program will achieve?
- If you only had one measurement of program quality, what would it be?
- How might the palliative care program impact (or be impacted by) other programs?
- Other:

### Assess Feasibility of Data Collection, Analysis

Beyond the interests of your stakeholders, it is important to evaluate how hard/easy it would be to gather data that would be needed to track a particular metric. For some metrics, reporting will be impossible in current conditions; however, you can also evaluate how realistic it would be to work toward gathering data on metrics that are very important to key stakeholders.

For each metric you're considering, think about:

- For existing programs, is this metric already being tracked and reported?
- Where would you get the data?
  - Available in EHR or claims/medications/other databases
    - How difficult would it be to extract data?
  - Must be collected specifically for this purpose
    - How labor-intensive might that collection process be?
    - Who would need to be involved?
      - How much bandwidth do those stakeholders have to take on new tasks?
- Would the data be consistently available?
- How reliable would the data be?
- Where/how would you record the data?
- What would the analysis process require?

### Aim for a Balanced Portfolio of Metrics

You want to be able to speak to different dimensions of the palliative care program, in order to have a complete picture of program quality. Most programs will have particular strengths and weaknesses -- if you have a balanced metrics portfolio, you can identify both.

See Metrics Balance Check Worksheet