Data Strategy Worksheet

This worksheet contains a set of questions that can be used to build and review your data strategy to align with your organization’s key performance metrics or a family of measures for a specific improvement effort. Not all questions need to be answered for each data point or measure; use this as a guide to highlight potential data integrity and data management issues.

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| **Component** | **Typical Questions** |
| Data Requirements | * What core data elements do you need to start with?
* Which ones will you need in the future?
* What are the sources of that data?
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| Current State: | **Plan of Action:** |
| Data Governance | * Who owns the data element(s)?
* Who defines meanings and valid values?
* What is the division of responsibilities between admin, clinical, and IT?
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| Current State: | **Plan of Action:** |
| Data Quality | * What validity issues are there with the required data?
* Availability, accuracy, consistency, timeliness?
* What data fixes are required?
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| Current State: | **Plan of Action:** |
| Granularity | * What level of detail do you need?
* Does the data need to be at different levels of detail for different uses?
 |
| Current State: | **Plan of Action:** |
| Integration | * How do you get the data?
* Does it need to be reformatted for consistency?
* Does it need to feed back to other systems?
 |
| Current State: | **Plan of Action:** |

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| **Component** | **Typical Questions** |
| Stage and Store | * What is your data architecture - specifically where is the data held?
* Will you have a central repository or data warehouse?
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| Current State: | **Plan of Action:** |
| Analysis | * What information and tools are required to perform the analysis?
* What skills are required to understand the data?
* What actions will result from the analysis? What are the criteria for those actions?
 |
| Current State: | **Plan of Action:** |
| Privacy | * Are there any sensitive data elements?
* What are the HIPAA compliance requirements?
* Will this data be shared with third-parties and what risks does that create?
 |
| Current State: | **Plan of Action:** |
| Reporting | * Do you have a need to report your data to others?
* Do you need to alter the data to properly graph/report it?
* Do you have the appropriate reporting tools?
* Who needs access and how will they get it?
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| Current State: | **Plan of Action:** |
| Access | * What are the requirements to make the right data available to the right people at the right time?
* Who are the data stakeholders and what are their data and reporting needs?
 |
| Current State: | **Plan of Action:** |
| Versioning and Retention | * If data is regularly updated, what data changes do you need to capture?
* How do you track what version you are using?
* How long do you keep data? When do you archive it?
 |
| Current State: | **Plan of Action:** |