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? | |
| 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? | |
| 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? | |
| 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? | |
| 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? | |
| 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:** |