

## ABOUT THE PRESENTER

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I'm a social gerontologist, with over 25 years of experience in working with older adults in non-profit, health care, and government sectors. I'm one of those individuals who love data, who can spend an entire day playing with PivotTables, putting together charts and graphs for visual storytelling. I am also skilled at process and value stream mapping.



# **Data Categories**

# Qualitative



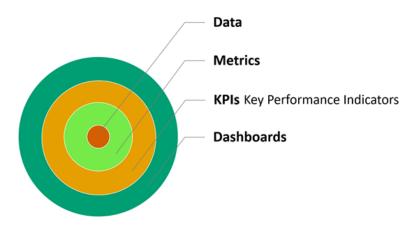
- Describes qualities and characteristics of something
- Non-statistical
- Useful to understand the "why"

## Quantitative



- Can be counted, measured, or expressed in numbers
- Results easy to summarize, compare, and track changes over time
- Useful to understand the "what" and "how many"

# **Terminology**



Data	<ul><li>Core of measurement activities</li><li>Critical to measuring progress</li><li>Identify opportunities for improvement in quantifiable terms</li></ul>
Metrics	- Standard for measuring or evaluating something, in numeric terms
KPIs	<ul> <li>Quantifiable measures used to gauge performance over time</li> <li>Way for an organization to their measure progress towards achieving goals</li> </ul>
Dashboards	<ul> <li>Visual of multiple KPIs on one screen, one page, one slide</li> <li>Tied to specific operational goals</li> <li>Provide leadership and others information needed to make decisions</li> </ul>



# **SMART Goals**

### are measurable

S	Specific	- Addresses the Who, What, Where, When, and Why
M	Measurable	<ul><li>What do you want to accomplish?</li><li>What is the change you want to see?</li></ul>
A	Attainable	<ul><li>Can we do this within our timeframe?</li><li>Do we have the tools/resources?</li><li>What are the competing priorities?</li></ul>
R	Realistic	<ul><li>Find the balance of too low a target v a stretch target.</li><li>Does management support this goal?</li></ul>
Т	Timebound	<ul><li>What is the timeline?</li><li>When do you want/need to accomplish this goal?</li></ul>

#### **WHAT**

- What do you want to change/measure?



#### Needs to be:

- Specific
- Concrete
- Countable

# WHERE & HOW

- Where is the data stored?
- What is the data source?



- What are you tracking right now (or could easily start tracking)?
- Is it automated or manual (input, processing, output)
- Time commitment to measure and track?
- Who is responsible?

#### **WHEN**



- How often will you measure it?
- How often will you pull data?
- How often is data updated?
- Snapshot in time?
- Change over time? (e.g. Year-over-Year, Quarter-to-Quarter)



# WIN Journey

## SharePoint

- Create list (aka form)
- Choose 'Versioning' option
- Create Tiles from different views
- Select desired criteria
- Export to Excel

#### Excel

- Clean up data (e.g. True/False to Yes/No)
- Create PivotTables & charts/graphs
- Use graphs in reports or create own dashboard

Available in PivotTables	Not Available in PivotTables
• Area	• Box & Whisker
• Bar	• Histogram
• Column	• Funnel
• Combo	• Scatter
• Line	• Stock
• Pie	• Sunburst
• Radar	• Surface
	• Treemap
	<ul> <li>Waterfall</li> </ul>







# **Parting Thoughts**

- Report-driven
- Ideologic alignment
- Start small

# Resources





### **Data Categories**

https://www.scribbr.com/methodology/qualitativequantitative-research/

Quality Measures: Types, Selection, and Application in Health Care Quality Improvement Projects

From Global Journal on Quality and Safety in Healthcare (2020) 3(4):144-146

https://doi.org/10.36401/JQSH-20-X6

## Measurement for Quality Improvement

By Health Quality Ontario

http://www.hqontario.ca/portals/0/documents/qi/gi-measurement-primer-en.pdf





## Developing a CQI Plan

RT = 43:03

Presented by Beth Adams & Montana Salvoni, ALTSA youtu.be/KYmDZBmlvZY (SMART goals 14:03-28:15)

#### KPIs vs SMART Goals vs OKRs

RT = 5:25

Presented by Zokri

https://www.youtube.com/watch?v=f9VJu7ju5B4

Measures, Metrics, and KPIs

RT = 8:32

Presented by Numerical Insights, LLC

https://www.youtube.com/watch?v=9ud2egVppUM&t=9s