

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.

Component	Typical Questions	
Data Requirements	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • What validity issues are there with the required data? • Availability, accuracy, consistency, timeliness? • What data fixes are required? 	
	Current State:	Plan of Action:
Granularity	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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:

Component	Typical Questions	
Stage and Store	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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: