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## Your Project Checklist

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This document contains checklists for the following section:

### **Explain and Motivate**

- Delivering Key Messages
- Providing Details
- Offering Other Information
- Supporting Consumers in Using Information

## Explain and Motivate: Delivering Key Messages

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### Key Points

- The information you include on the first page of your report is critical, as your audience will use this information to decide whether they want to look at the data in your report.
- The initial content should communicate your reasons for providing quality information and how your audience will benefit by using this information. Vignettes can help make these key messages accessible and inviting.
- The first page should be clear about the subject of your report and the type of data you are presenting. It should also make it easy for the user to get to the comparative quality data (e.g., through a link on the first page or a table of contents).
- A simple framework can help your readers understand quality information, which is new and complex for most people.
- It is useful to include content that builds the trust of your audience (e.g., by emphasizing your mission, expertise, and independence and/or by receiving endorsements from different organizations in your community).

To learn more, go to [Communicating Key Information Upfront](#).

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### Questions and Tasks

- ☐ List the kinds of information and motivational messages you will include in the initial pages of your report to grab and keep the attention of potential users.  
*Type your response here.*
- ☐ What do you want your audience to understand about the health care organizations included in your report?  
*Type your response here.*
  - What aspects of this do they really need to know?  
*Type your response here.*
  - What messages can you use to convey those points succinctly?  
*Type your response here.*
- ☐ How will your audience benefit from the information in the report?  
*Type your response here.*
  - What messages can you use to convey those points succinctly?  
*Type your response here.*
  - Identify one or two stories or examples that illustrate how quality information can make a difference to people.  
*Type your response here.*

## **Explain and Motivate: Delivering Key Messages**

- ☐ What information can you include to enhance your reputation as a reliable source of quality information and to gain the trust of your audience?

*Type your response here.*

- Learn more about developing the content of a report in [Explain and Motivate](#).
- List [all topics in the Checklist](#).

## Explain and Motivate: Providing Details

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### Key Points

- Some users of your report card may be interested in additional details about specific topics (e.g., information on how measures were selected and technical details on how scores were constructed). It can be helpful to include this type of information, but do so only in the later pages of your report.
- It is important to keep the comparative data prominent in the report and not to overwhelm your users by providing too much detailed information in the introductory pages.
- Some readers will want information about your organization (e.g., how quality information is related to your mission) and the endorsers of your report.
- When appropriate and feasible, it can be helpful to provide contact and descriptive information for the organizations being rated in your report.
- Some readers will appreciate brief descriptions of where and how you obtained the data for the report (e.g., standardized data collection methods employed to collect the data and how data were audited).

To learn more, go to [Providing Detail for Those Who Want It](#).

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### Questions and Tasks

- ☐ What types of detailed information might you provide in your report? For each type of information:

*Type your response here.*

- What evidence do you have that this information would be useful to your audience?

*Type your response here.*

- What are the barriers to acquiring the information and providing it in your report?

*Type your response here.*

- ☐ What criteria did you use to select the measures included in your report? How would you explain these criteria in the context of the report?

*Type your response here.*

- ☐ Which statistical concepts are likely to come up in your report? How can you explain these concepts to your audience in lay terms and in a manner that does not lead them to suspect you have manipulated the data?

*Type your response here.*

- ☐ What is your plan to test your ideas with your audience to see whether the additional details you think may be useful are truly helpful to them? Document your findings and note any implications for changing your approach.

*Type your response here.*

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## Explain and Motivate: Offering Other Information

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### Key Points

- If space and resources allow, a sponsor may want to offer additional information that is related to comparative quality information.
- Relevant information could include key health care facts related to the subject of your quality report (e.g., the nature of conditions that are addressed by your ratings, the key things you should make sure you or your clinicians do to treat or manage the condition, and the importance of preventive services).
- Many report sponsors use this opportunity to remind consumers and patients of their rights and protections. Explore this topic in [Highlight Consumer Rights, Protections, and Ways to Complain](#).
- You can also inform consumers about other relevant resources (e.g., other quality reports that provide similar information and information about organizations that support patients with particular conditions).
- Another option is to offer information that helps consumers understand health care costs and how they can lower their costs while still receiving high-quality care.

To learn more, go to [Taking Advantage of the “Teachable Moment”](#).

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### Questions and Tasks

- ☐ What types of additional information would your audience be interested in? Which of these could you provide?  
*Type your response here.*
  - ☐ For each type of information, what problems might you encounter in acquiring and providing it? For example, you may want to explain the process for appealing health plan decisions, but pending legislation may affect what enrollees can do.  
*Type your response here.*
  - ☐ For each type of information, how would it be useful to your audience? (If you have to shorten your report, it will be helpful to have some idea of what information is more expendable.).  
*Type your response here.*
  - ☐ How will you test these options with your audience? Document your findings, noting how audiences responded and how you can address any issues that your audience(s) raised.  
*Type your response here.*
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  - List [all topics in the Checklist](#).

## Explain and Motivate: Supporting Consumers in Using Information

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### Key Points

- You can and should support consumers in understanding information on comparative quality and using it for a variety of purposes.
- The primary purpose of quality information is to help consumers make decisions about a health care provider or plan. Explore this topic in [Help People Make Decisions](#).
- Reports can incorporate decision aids to reduce the decisionmaking burden on users (e.g., worksheets, checklists, list of steps in the decisionmaking process, and formal computerized decision aids). Explore this topic in [Incorporate Decision Aids, Informal and Formal](#).
- Some consumers would benefit from access to an informed individual who can answer their questions, address their concerns, and help them apply the health care quality information to their personal situation. Explore this topic in [Provide Access to Information Intermediaries](#).
- You may want to consider offering consumers guidance in initiating nonconfrontational discussions about quality issues with their health care providers.

To learn more, go to [Supporting Consumers in Using Information](#).

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### Questions and Tasks

- ☐ How do you expect your audience to use the quality information presented in your report?  
*Type your response here.*
- ☐ How else could the information be used? What approaches could you use to convey that message?  
*Type your response here.*
- ☐ What examples and stories could you use to illustrate how members in the community are or could be using and benefiting from the information?  
*Type your response here.*
- ☐ What materials could you provide to help your audience use the information in your report? Note what is involved in each option and how feasible it is.  
*Type your response here.*
- ☐ How would you test different decision-support options with your audience? Document your findings and the implications for effective decision support.  
*Type your response here.*
- ☐ What do you know about where your audience is likely to turn for help and guidance?  
*Type your response here.*
  - If you don't know, how can you get more information?  
*Type your response here.*

**Explain and Motivate:**  
**Supporting Consumers in Using Information**

- Which individuals or organizations may be available to help your audience understand how to apply information on quality to their health care decisions?

*Type your response here.*

- For each one, how feasible would it be for you to enlist the person/organization in helping your audience with quality information?

*Type your response here.*

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