

# The Whys, Wherefores, and How-To's of Consumer Reporting

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## Structure of Session

- **First Principles of Reporting**
  - David Kanouse
- **Why It's So Hard to Do Consumer Reporting Well**
  - Lise Rybowski
- **Best Practices for Presenting Quality Data**
  - Jeanne McGee



The Whys, Wherefores, and How-To's of Consumer Reporting

# First Principles of Reporting

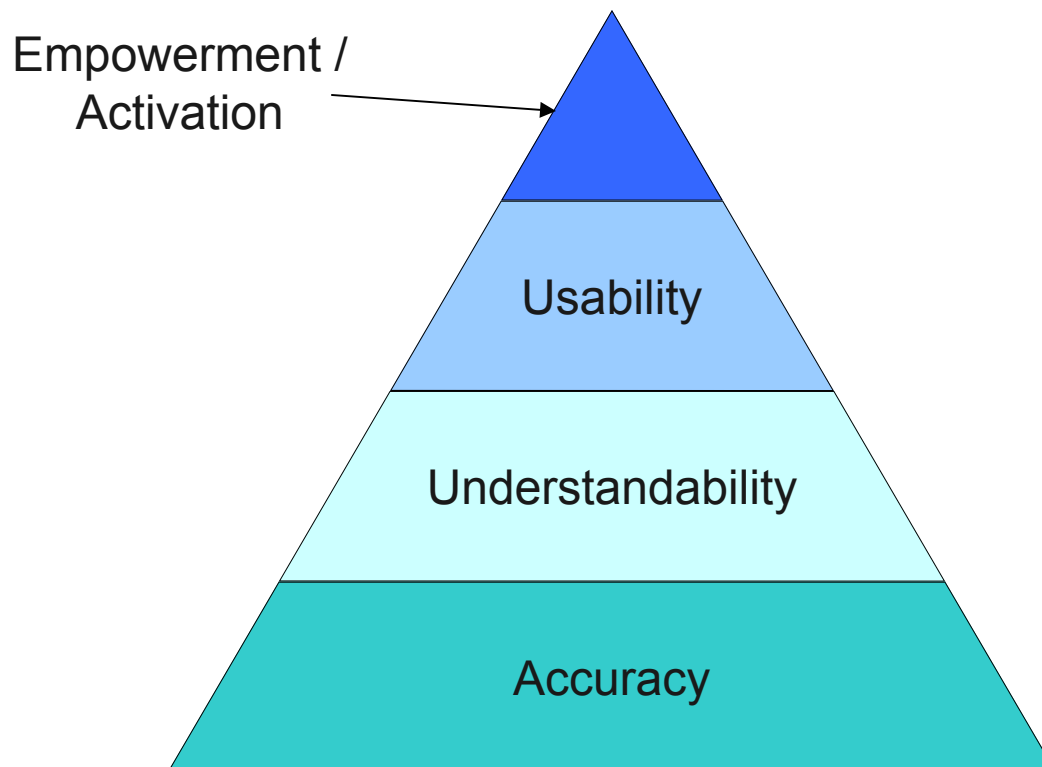
David Kanouse  
RAND Corporation



# Why We Report Quality Data

- To put data out there (so they can do their thing and express themselves)
- To fulfill reporting mandates
- To inform consumers or other audiences
- To encourage and direct quality improvement efforts
- To help people make better decisions

# Hierarchy of Goals





# How to Approach Quality Reporting

- Sound Design Principles
  - Derived from the literature
  - Tested in practice
  - Focus on the reporting process



## Literature Considered

- Decision Science
- Cognitive Psychology
- Adult education and literacy
- Social marketing
- Consumer decision aids
- CAHPS research on reporting



# Planning Principles

- Know your audience
- Define goals and priorities
- Identify resources and constraints
- Consider barriers and facilitators





# Design Principles

- Design your report to reflect goals and priorities
- Plan for promotion and dissemination from the beginning
- Test and evaluate
  - While designing the report
  - After the fact

# The Reporting Cycle

## Planning (Principles 1-4)

## Design (Principles 5-7)

## Testing

## Implementation

## Evaluation

Identify &  
Prioritize  
Objectives

Understand &  
shape context

- Audience
- Resources
- Constraints
- Facilitators
- Norms

Design

- Report
- Promotion
- Dissemination
- Evaluation

Test

- Report
- Promotion
- Dissemination
- Evaluation Process

- Develop, promote, and disseminate report
- Collect data for evaluation

Analyze, interpret and act on

- Awareness and knowledge
- Beliefs and attitudes
- Behaviors and choices



# Start with Your Audience

- Know your audience
  - Who they are
  - What they care about
  - What they know and understand
  - What actions they can take
  - What drives those action
- Adopt their point of view



## Tailor the Report to the Audience

- Present information so it can be understood and used
- Place new information in context
- Tie it to something the audience wants
  - High-quality health care for the family
  - Avoid bad experiences with health care
  - Quality at an affordable price
- Make it meaningful, related to experience



## The Planning Context – What's Feasible?

- Identify resource and other constraints
  - Budget
  - Timeline
  - Organizational and political
  - Staff and vendor capabilities
  - Potential partners
- Don't be your own worst enemy
- Manage others' expectations



# The Planning Context – Barriers and Facilitators

- Consider barriers and facilitators
  - Setting in which information is provided
  - What do users have to do to get to information?
  - Timeliness of information
  - Language and cognitive barriers
  - Pushback from those being evaluated
  - Trusted intermediaries
- Figure out how to overcome them or turn them to your advantage



## Choose Goals To Guide Your Approach

- Helping people make better decisions involves more than providing facts
- To affect decisions, identify and influence as many determinants as possible
  - Consider other information besides quality
  - Help consumers integrate and evaluate information



## Defining Goals Involves Tradeoffs

- No report can be all things to all stakeholders
  - If you have different audiences to reach, you may need to create different reports
  - “Layering” can often be helpful
  - Making quality reports evaluable can make them controversial
- Set priorities and make explicit tradeoffs





## Promotion and Dissemination

- Think of the report as a product that needs to be marketed
- Potential users need to be primed
- Delivery should be timely and convenient
- Successful dissemination requires advance planning
- Consider community-based organizations or other intermediaries



# Testing and Evaluation

- Build in ongoing testing and evaluation at each stage
- Best evidence for what works for your audience is locally gathered
- Evaluation needs to be planned
- Document lessons learned so they will be available

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