Section II:

Assessment Methods

It is important to be clear about what datasets or information systems will be included in your public health informatics profile assessment as there will possibly be items that fall into a gray area. Being clear about your inclusion and exclusion criteria will allow you to manage the scope of the project and to succinctly develop the methods (based on your needs) that you use to collect the assessment data.

Assessment questions

There are many factors to consider in determining what questions to ask in the public health informatics profile assessment. The most important of which are the purpose and scope of the assessment: in other words, what system capacities are you assessing and for what purpose? Here are some additional tips for developing questions.

1. Remember stakeholders' needs.
Consider stakeholders' needs for information, and develop questions that meet their needs (see Section I).

2. Study your information needs.
Consider your data analysis plan to be sure that you will be collecting the data you need.

3. Define how your data will be used.
Be very clear and concrete about how you will actually use every bit of information collected. If you don't have a clear purpose for a piece of information, don't collect it.

4. Evaluate before you implement.
Try to test questions and/or get feedback on questions as much as possible before implementing the assessment, since public health informatics questions may be complicated and require additional refinement before implementing.

5. Explain unfamiliar terms.
Provide definitions and agency examples of terms not commonly understood or terms that may mean different things to different people.

6. Diversify your questions.
Use a mixture of questions – those that solicit discreet answers and those that require descriptive answers.

Collecting the information

There are several ways that information can be collected, including surveys, focus groups, and key informant interviews. Here are some tips for determining how to collect the information.

1. Keep the details in mind.
Consider your audience, their knowledge level of the questions, the level of resources you have, and the timeframe in which you have to collect the information.

2. Recycle available information.
Use exiting data/information when it exists. You may be able to save time by validating the existing information with your responders.

- **3. Weigh your options for collecting the information.**
  In-person interviews work well when questions are complicated or when a dialogue is desired. Conversations are important to assure the responder understands your question completely. They are also important for clarifying questions as needed for future interviews. The risk is that the interviewer can unintentionally lead the responder to certain responses. In-person interviews can assist by increasing the overall response rate.

More traditional surveys can be useful for simple and straightforward questions that will be commonly understood among your audience. Focus groups or group discussions can also be beneficial when you are interested in more of a group consensus on a topic.

Conducting the assessment

Because your survey or focus group respondents may not have a lot of experience with the type of questions you are about to ask, it is important to be effective in your communications about the project, including why you are collecting the information and what you will be doing with the information once it is collected.

- **1. Start with transparency.**
  Communicate the purpose of your assessment upfront and what you're going to do with the information.
- **2. Establish every one's role.**
  Explain your role and that of your respondents in collecting the information.
- **3. Share your questions prior to conducting in-person interviews.**
  Consider providing a copy of the questions before meeting with people if you have decided to do in-person interviews. Allow responders to change their responses if needed (i.e., after they see a draft report) in case there was a misunderstanding.
- **4. Assign a note taker.**
  If you're conducting an in-person interview, have a person taking notes and capturing responses, and have another person asking questions.
- **5. Allot enough time.**
  Be clear on the amount of time needed and that some follow-up may be needed.
- **6. Collect background materials.**
  Let the program staff know that you may want to collect copies of existing forms or other program materials that help describe the activity and information being used.