

1. Making the Value Case

Making the Value Case Guide

As the project coordinator, you must guide your planning team through creating a compelling value case for a new surveillance program. The questions below highlight key areas the team should consider when developing that value case. Although the team will likely have other important questions to address during that process, these questions serve as a good starting point. Use this guide as a worksheet that the team completes or as the basis for a team meeting agenda.

Under each question you'll see additional details to help you comprehensively, and more efficiently prepare for planning team or other discussions. In addition, the *Recommended Readings* for this section provide more in-depth information on select aspects of making the value case and on creating any associated logic models.

1. What is the public health need or problem for which the proposed surveillance program could provide needed information? Why is it considered a priority?

When characterizing the need and the burden of the condition, consider:

- Population impacted
- Estimated or known number of cases, incidence and prevalence
- Indices of severity, such as case fatality ratio
- Overall mortality rate
- Indices of lost productivity, such as bed-disability days
- Index of premature mortality; for example, years of potential life lost
- Associated medical costs
- Preventability and expected benefit in reducing morbidity and mortality

2. Which diagnoses, conditions or risk factors—or some combination of these items—needs to be surveilled to assess the status of that problem? In which populations? To what extent do health care organizations have that information, and how likely is it to be in an EHR system?

Address these questions at a more general level during this stage of the project; you will identify the specific vocabularies and value sets for the data elements of interest later when completing the Analyzing Critical Data and Workflow section of the toolkit.

3. How can you best articulate the value case for your agency leadership (or your legislature/general assembly)?

When addressing this question, consider:

- Other jurisdictional priorities and initiatives that the surveillance program can support or leverage, such as the Medicaid State Innovation Model, population health improvement goals or other priorities.
- How to tie what your agency leadership cares about most into your value case.

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- How to communicate or jointly develop the value case with leadership.
4. How do you best articulate and communicate the value case for the impacted community, especially those most affected by the need or problem? How can you describe it in terms that support the interests of any relevant advocacy or opposition groups?

When addressing these questions, consider:

- The potential outcome that will occur in the community without this activity.
 - Any potential cost savings or return on investment, including potential savings in dollars and time for the business community, that this initiative could deliver.
 - Identifying other organizations that could use this surveillance information to inform their activities, how they could use it and if it provides any benefits for them.
5. How do you best articulate the value case for the health care organizations that would provide the data for this program? How do you frame that value case in terms of their priorities and drivers?

Participating health care organizations will be using their private dollars to participate in a public health program, so your value case must identify and describe business benefits the surveillance program offers them. Examples of possible business benefits include cost savings, improved patient or population management and reduced hospital readmissions. In addition, you must consider how you will maintain their interest and commitment.

You should also consider:

- How you will ensure that the surveillance program minimally impacts workflows, systems or both in the data provider setting.
 - How you will transmit information about data quality problems in the surveillance system to the EHR so that both the surveillance system and the EHR can make data quality improvements.
 - Whether or not you will provide periodic reports to the data providers or community.
 - Whether or not you will share the data coding and standardization methodologies with the health care delivery community.
6. What are the outcomes, outputs, rules, inputs and other elements that you could use to build a logic model for your surveillance program?

See the guide to Creating a Logic Model in Making the Value Case, the sample logic model for diabetes and the W.K. Kellogg Foundation Logic Model Development Guide guidance on building logic models.

7. How will you determine whether the benefits of the surveillance program for your agency or your agency and its community partners outweigh the up-front and on-going costs?

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*Definitively quantifying the program's benefits at this phase of planning may not be feasible; you have not yet determined many influencing factors, including the information sharing model you will be using (push, pull or shared access), the number of data providers you will be working with, and the amount of data cleansing you will have to do. However, at this point, you and your team must have some level of confidence that the benefits will outweigh the collective costs to both you and your community partners (see the **Selecting a Surveillance Model tool in the Introduction section, and the Total Cost of Ownership tool in the Technical Analysis section**).*