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Supporting equitable and quality mental health care in Jackson County.

Value-Based Training
Key Performance Indicator (KPI) Change Instruction

October 4th, 2024

Value-Based Training – New Goal and KPI Change Instruction

Introduction:

Based on agency participant feedback, we are very pleased to announce that the ability to change Key Performance Indicators has been integrated into the VBP Program framework.

This presentation is for agencies that are in their 2nd or third year of the VBP Program, who have familiarity with the terms and concepts of the program.

If you need a more comprehensive review of the VBP Program, please contact your CMHF Liaison.

Value-Based Training – New Goal and KPI Change Instruction

Background: In the initial year of the program, agencies scored their Quarterly Report of Values by identifying "Tasks" that assign point values for accomplishments necessary to demonstrate improvement in a goal. The accumulation of points earned by completing tasks are used to calculate an agency's year end incentive payment.

In year 2 of the Program, based on agency feedback, we shifted to CMHF staff scoring the Quarterly Report of Values.

As the VBP Program evolves, it is necessary to define new Tasks to assign point value to steps necessary for changing Key Performance Indicators. Tasks provide structure to the VBP Program to ensure equity and fairness in calculating an agency's incentive payment.

CMHF staff will continue to score the Quarterly Values Report, but knowledge of Tasks remains important as a resource to understand the accomplishments necessary to demonstrate improvement, and understand how the year-end incentive payment is determined.

Value-Based Training –KPI Change Instruction – Review of terms

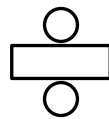
The KPI "Statement" (Definition) describes what the KPI represents and is reflected as a number or a percentage

Example: % of adult therapy clients whose 1st therapy session is 7 days or less from intake.

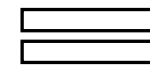
The KPI Formula identifies how the value is calculated: Numerator / Denominator = Value

Example:

of clients whose 1st therapy session occurred in the quarter and occurred 7 days or less from their intake



of adult therapy clients whose 1st therapy session occurred in the quarter



Value
(% or #)

New Task - Changing a Goal Statement

Task ID	Short Task Name -	Domain	Complexity	Difficulty	Justification for change	How to Request Change	definition - description of task	Base Points	Base Point if Process Indicator	Additional Applicable Rule
CH-1	Change goal statement	any	Beginner	Easy	Statement is unclear, does not reflect the intended goal	Complete KPI Change Request Form for approval by PL(Program Liaison)	Change an existing goal statement to better reflect the intended goal.	0	n/a	change of wording only, cannot impact domain or values
CH-2	Change Principal or Supporting KPI statement	any	Beginner	Easy	Statement is unclear, does not reflect the intended value	Complete KPI Change Request Form for approval by PL(Program Liaison)	Change an existing KPI statement to better reflect how improvement of the goal will be measured	0	n/a	change of wording only, cannot impact domain or values

Existing Goal Statement: Increase the rate of success for clients seeking treatment.

Revised Goal Statement: Increase the rate of clients demonstrating improved clinical outcomes.

In this example: The existing Goal statement is unclear as “success” can be measured in many ways. Specifying the type of success intended provides clarity.

New Task - Changing a KPI Statement

Task ID	Short Task Name -	Domain	Complexity	Difficulty	Justification for change	How to Request Change	definition - description of task	Base Points	Base Point if Process Indicator	Additional Applicable Rule
CH-1	Change goal statement	any	Beginner	Easy	Statement is unclear, does not reflect the intended goal	Complete KPI Change Request Form for approval by PL(Program Liaison)	Change an existing goal statement to better reflect the intended goal.	0	n/a	change of wording only, cannot impact domain or values
CH-2	Change Principal or Supporting KPI statement	any	Beginner	Easy	Statement is unclear, does not reflect the intended value	Complete KPI Change Request Form for approval by PL(Program Liaison)	Change an existing KPI statement to better reflect how improvement of the goal will be measured	0	n/a	change of wording only, cannot impact domain or values

Existing KPI: % of Clients whose PHQ 9 score dropped at least 5 points by discharge.

Revised KPI: % of Adult Outpatient Therapy clients whose PHQ 9 score decreased at least 5 points by discharge.

In this Example, the existing KPI does not specify what client population, and could, for example, be assumed to be “all” clients. The agency is actually reporting values for adult outpatient therapy clients. **The revised statement does not change the formula**, but is important to ensure the intended value is reported consistently.

New Task - Changing a KPI Formula

Task ID	Short Task Name -	Domain	Complexity	Difficulty	Justification for change	How to Request Change	definition - description of task	Base Points	Base Point if Process Indicator	Additional Applicable Rule
CH-3	Change Principal KPI formula	any	Intermediate	Medium	Agency has recognized a key defect in the KPI formula and is asking to redefine the formula in order to improve the measure	Complete KPI Change Request Form for approval by PL(Program Liaison)	Define new formula, produce 2 current values	10	n/a	does not replace already reported values. proceed with A-1 and improvement tasks as applicable
CH-4	Change Supporting KPI Formula	any	Intermediate	Medium	Agency has recognized a key defect in the KPI formula and is asking to redefine the formula in order to improve the measure	Complete KPI Change Request Form for approval by PL(Program Liaison)	Define new formula	5	n/a	does not replace already reported values. Begin reporting new value upon approval of change

Existing KPI : % of Adult Outpatient Therapy clients whose PHQ 9 decreased at least 5 points by discharge.

Revised KPI : % of Adult Outpatient Therapy clients with initial PHQ score ≥ 10 , whose score decreased at least 5 points by 8th session.

Example: Measuring the change in score at discharge does not account for how many sessions a client has participated in. Measuring at a specified point (8th session) increases consistency in comparing changed scores in the population.

Note: For this task, changing a Principal KPI requires reporting 2 current values, changing a supporting KPI does not.

New Tasks – Replacing a Principal KPI



New Task – Replacing a Principal KPI with a Process Indicator

Task ID	Short Task Name -	Domain	Complexity	Difficulty	Justification for change	How to Request Change	definition - description of task	Base Points	Base Point if Process Indicator	Additional Applicable Rule
RP-1	Replace Principal KPI with Process Indicator	any	Beginner	Easy	current goal/KPI data is being affected by a process related to obtaining the necessary data for meaningful analysis and improvement - process needs to be addressed before improvement can be effectively measured	Complete KPI Change Request Form for approval by PL(Program Liaison)	Define the Process Indicator, produce 2 current values	n/a	10	Principal KPI that is being replaced is put on hold (values are not reported)
RP-4	Replace Principal KPI - return to original Principal Indicator previously replaced (RP-1) with Process Indicator	any	Intermediate	Easy	desired improvement in the process has been achieved	Complete KPI Change Request Form for approval by PL(Program Liaison)	Return to the original Principal Indicator that was replaced (RP-1) with a Process Indicator	5	n/a	if process indicator was new, and agency wants to keep, if at max of 12 have to replace another

Existing Principal KPI: % of Adult Outpatient Therapy clients with initial PHQ score ≥ 10 , whose score decreased at least 5 points by 8th session.

New Principal Process Indicator: % of Adult Outpatient Therapy clients who have a PHQ administered at each session.

In this example, the agency discovered the PHQ was not being administered per procedure therefore needed to focus on improving that process in order to effectively measure clinical change. Once the desired improvement is made on the process, the original Principal KPI is returned.

New Task – Replacing a Principal KPI with a New Indicator

Task ID	Short Task Name -	Domain	Complexity	Difficulty	Justification for change	How to Request Change	definition - description of task	Base Points	Base Point if Process Indicator	Additional Applicable Rule
RP-2	Replace Principal KPI with a new Indicator	any	Intermediate	Medium	current KPI does not effectively reflect the intended goal, or circumstances have changed resulting in inability to report value	Complete Change Request Form for approval by PL(Program Liaison)	Define new indicator, produce 2 current values	10	if process, RP-1 applies	replaced KPI is retired, values no longer reported, proceed with A-1 and improvement tasks as applicable

Current Principal KPI: % of Adult Outpatient Therapy clients with initial PHQ score ≥ 10 , whose score decreased at least 5 points by 8th session.

New Principal KPI: % of Adult Outpatient Therapy clients with initial **DASS** score ≥ 14 , who move to a lesser degree of severity by the 8th session.

In this example, the agency is changing the assessment tool for adult therapy clients from the PHQ to the DASS.

New Task – Replacing a Principal KPI with an Existing Supporting Indicator

Task ID	Short Task Name -	Domain	Complexity	Difficulty	Justification for change	How to Request Change	definition - description of task	Base Points	Base Point if Process Indicator	Additional Applicable Rule
RP-3	Replace Principal KPI with existing supporting KPI	any	Beginner	Easy	existing supporting KPI better reflects desired improvement of the goal	Complete KPI Change Request Form for approval by PL(Program Liaison)	Identify supporting KPI to replace Principal, produce 2 values	5	n/a	(R-1) does not apply to previously reported values

Principal KPI: Number of adult outreach clients discharged in the quarter.

Supporting KPI: % of adult outreach clients discharged within 30 days of being assessed ready for discharge in the quarter.

In this example the agency has an access goal related to timely discharge. In reviewing data over time, the agency realizes the principal indicator is not reflecting the specificity of timeliness in addressing discharge. The supporting KPI is an active KPI and is switched to the Principal KPI position which can earn points for demonstrating improvement.

New Task – Establish a New Baseline Using Different Statistical Process Control Method

Task ID	Short Task Name -	Domain	Complexity	Difficulty	Justification for change	How to Request Change	definition - description of task	Base Points	Base Point if Process Indicator	Additional Applicable Rule
A-2	Establish a new Baseline /Target for existing Principal KPI - change SPC method	any	Medium	Medium	indicator has very low numbers in critical areas where the method of calculating B/T does not work for setting goals and monitoring progress	Complete KPI Change Request Form for approval by PL(Program Liaison)	Re-Calculate B/T using a different Statistical Process Control method	20	10	R-1 would not apply to new re-calculated values

In some instances, a different method of measuring Standard Deviation (SD) may be necessary to increase the reliability of the data.

If, for example, a value is calculated with a low N (typically less than 12) , a high SD may result, indicating there may be a lot of variation in the data. High variation in data makes it less reliable, resulting in a misleading baseline and ineffective target.

If you feel this may apply, discuss further with your CMHF Program Liaison.

Change Request Forms



Value-Based Training – KPI Change Request Forms

Change Request Forms and the complete list of Tasks are located in your SharePoint "Submit Data Here" folder.

The screenshot displays a SharePoint interface. On the left, a folder named "Submit data here" is circled in green. An arrow points from this folder to a detailed view of its contents on the right. The contents include:

- Archived Submissions (Folder)
- BLANK Quarterly Submission Forms.xlsx (Excel file)
- New Goal and KPI Change Forms.xlsx (Excel file)

Below the folder view, a navigation bar contains three items: "KPI Change Request Form" (circled in green), "New Goal Request Form", and "2024 Revised List of Tasks".

Value-Based Training – KPI Change Request Form

KPI Change Request Form													
Date of Request	Existing KPI ID #	Short Name of Existing KPI	Principal KPI? Yes/no	Associated Goal #	Domain	Justification for Change (Enter Task ID)*	New KPI Definition	New KPI Short Name	Formula	% or #	Increase or Decrease	existing values to report?	Date Approved



Information on the KPI that is being changed



Information describing how the KPI is changing.

Value-Based Training – KPI Change Request Form

Enter information on the KPI that is being changed.

Date of Request	Existing KPI ID #	Short Name of Existing KPI	Principal KPI? Yes/no	Associated Goal #	Domain
10/1/2024	5	PHQ Improvement	yes	2	Outcome

Value-Based Training – KPI Change Request Form

Task ID	Short Task Name -
CH-1	Change goal statement
CH-2	Change Principal or Supporting KPI statement
CH-3	Change Principal KPI formula
CH-4	Change Supporting KPI Formula

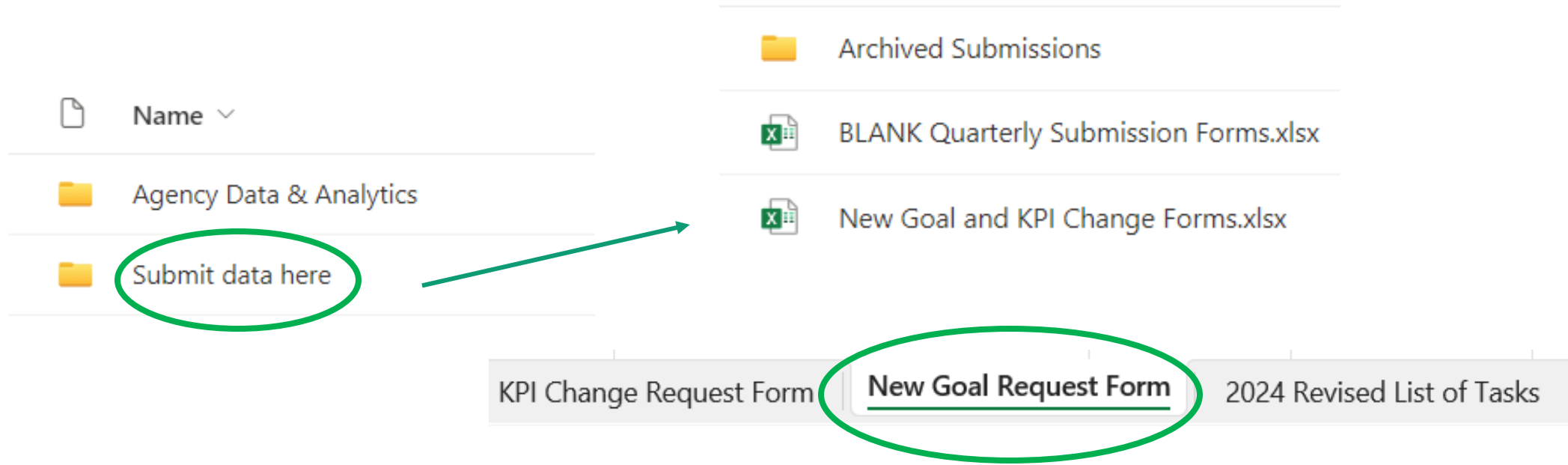
Enter information describing how the KPI is changing

Justification for Change (Enter Task ID)*	New KPI Definition	New KPI Short Name	Formula	% or #	Increase or Decrease	existing values to report?	Date Approved
CH-3	% of Adult Outpatient Therapy clients with initial PHQ score > 10, decreased at least 5 points by 8th session.	PHQ Improvement 8th session	# Adult OP Therapy Clients with > 5 point reduction by 8th session / # Adult OP Therapy Clients with initial PHQ score \geq 10	%	Increase	yes	completed by CMHF staff

For the Justification, enter the Task ID from the List of Tasks

Value-Based Training – New Goal Request Form

Change Request Forms and the complete list of Tasks are located in your SharePoint "Submit Data Here" folder.



Value-Based Training – Adding a New Goal

An agency can have a maximum of four goals and up to a maximum total of 12 KPI's.

- A new goal can be added if an agency does not have the maximum of four goals.
- When adding a goal, the Principal KPI must be defined, and two current values reported.
- Up to to 3 additional supporting KPI's can be defined, so long as the total number of KPI's in the agency dashboard does not exceed 12.

New Goal Request Form						
Date of Request		Date Approved				
New Goal #						
Goal Statement						
Domain						
	Definition	Domain	Short Name	# or %	Increase or decrease	Formula
Principal KPI						
Supporting KPI						
Supporting KPI						
Supporting KPI						

required →

optional →

Value-Based Training – New Goal and KPI Change Instruction

Steps to Request Changes

1. Complete the Change Request Forms
2. Schedule time with your Program Liaison to review
3. If applicable, report values associated with the changed KPI's in your October Values Report
 - 2 current values required (current and prior report period)
 - 4 consecutive quarters (if you have hem) to establish baseline / target
4. A change can be requested at any reporting period, beginning 10/31/24.
We strongly encourage you to focus on Principal KPI's.
5. **Once a single KPI has been changed, it cannot be changed again for 4 quarters.**