

Focus group and Interview Guide (Healthcare Professionals)

Welcome and introduction (15 minutes)

Thank you for agreeing to take part in this research project. My name is **XX** and I will be the facilitator for today's group discussion. I am a **XX** in this project which is entitled: Development of a patient-centered *balanced scorecard for rheumatoid arthritis*. For short, it is called the Balanced Scorecard project. We have **XX** present to take notes and we also have **XX** here to provide a brief presentation to describe what a balanced scorecard is to set the stage for our discussion. As well, we have **XX** here to observe the process.

[Project Overview]

Research tells us that RA care in Canada varies considerably between providers and provinces and that people living with RA may or may not be receiving the best possible care. This is a challenge we are tackling and the goal of this research is to design and test a tool called a balanced scorecard for supporting improvements in rheumatoid arthritis, which we will abbreviate as RA, care. A balanced scorecard is similar to a report card and it is used to report on healthcare performance.

We invited you to take part in this group discussion today because *[allied health providers/physicians/managers]* are important stakeholders when it comes to assessing care for inflammatory arthritis as it is currently delivered. Through a series of focus groups like this one we will be able to engage with a variety of key stakeholder groups and gather enough information, from the right mix of people, to ensure that the vision is one that represents all involved in RA care.

[Setting the ground rules]

Before we begin, I would like to review a few ground rules for the discussion:

- I am going to ask you several questions. We do not have to go in any particular order but we do want everyone to take part in the discussion as your ideas are all important to our research. We ask that only one person speak at a time.
- Feel free to treat this as a discussion and respond to what others are saying, whether you agree or disagree. We're interested in your opinions based on your own personal experiences, so there is no right or wrong answer. We are here to learn from you.
- Don't worry about having a different opinion than someone else, but please do respect each other's answers or opinions.

- We will treat your answers as confidential. We are not going to ask for anything that could identify you and we are only going to use first names during the discussion. We also ask that each of you respect the privacy of everyone in the room. Please do not share or repeat what is said here in any way that could identify anyone in the room.
- We are recording the discussion today and also taking notes because we don't want to miss any of your comments. Once we start the digital recorder, we will not use anyone's full name and we ask that you do the same.
- We will not include your names or any other information that could identify you in any reports we write.
- Finally, this discussion is going to take about 1-2 hours. You are free to leave at any time, though we would prefer you to stay for the whole time if you can. We will take a break after 1 hour.
- Does anyone have any questions before we start?

[Start digital recorder. Ask participants to introduce themselves using their first name.]

[Introduce the concept of a balanced scorecard]

Before diving in to a discussion of RA care, we would like to touch briefly on the concept of the balanced scorecard itself. The balanced scorecard was developed at Harvard Business School by Dr. Robert Kaplan and Dr. David Norton in the early 1990's.

Essentially, it is a management tool developed for the business world to enable companies to monitor their success in achieving strategic goals by reporting on measures that are specifically linked to those strategies. In other words:

“measuring if you're doing what you know you need to do to get to where you want to go”

A defining feature of the balanced scorecard is that it is comprised of 4 domains which are shown in the following figure. Each measure included in the traditional balanced scorecard must fit into one of these 4 categories. These categories are:



<http://www.balancedscorecard.org/BSC-Basics/About-the-Balanced-Scorecard> (Accessed January 2, 2018)

The purpose of focus groups and interviews is to determine:

- i. The applicability of the traditional domains of the balanced scorecard to arthritis care and any adaptations needed in this context;
- ii. Thoughts on the implementation of the quality framework

Questions for discussion:

We recognize that some of these topics are broad so we'll spend the first 30 minutes or so focusing on care...

1. What role does measurement play in your healthcare experience?
 - **Probing:** Are there any health status or outcome measures that are currently captured that could be useful in reporting efforts?
 - **Probing:** What isn't captured that could be useful in reporting efforts?
 - **Probing:** Thinking about your experiences so far, does measurement healthcare quality come up in (receiving/providing) care?
 - **Probing:** What role do you envision a healthcare report card could ("balanced scorecard") play in your healthcare experience.
2. Considering the 4 domains of the traditional balanced scorecard which are learning and growth, internal processes, customer/stakeholder relations, and financial or stewardship perspective, what adjustments, if any, would be needed for it to apply to IA care?
3. What are the barriers/facilitators to implementing the balanced scorecard in a clinic?
4. Are there regional/local differences that may impact the choice of measures and/or the implementation of the scorecard
 - **Probing:** what would these distinctions (i.e., urban vs. rural; university associated clinics vs. community based)
 - o **Probing:** Are these distinctions relevant from the point of view of measuring quality of care via a scorecard.

5. Are there any final comments or ideas that you would like to bring up before we conclude the focus group?

[Conclusion and Final Thanks]

Again, thank you so much to everyone for making the time to be here and for all of your thoughtful contributions. It has been a fabulous discussion and generated a lot of rich information to be incorporated into this first phase of the project, setting the vision.

So far we have conducted X focus groups and X interviews and we expect to have another X in the following weeks.

If you have any questions please be in touch with XX at contact information provided