



HQIP

Healthcare Quality
Improvement Partnership

Guide on How to Present Clinical Audit to the Public

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Clinical audit tool to promote quality for better health services

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1 Introduction to the guide

1.1 Who the guide is for

This guide is for healthcare professionals or managers who are responsible for carrying out clinical audits. It is also for:

- clinical audit and clinical governance managers and staff
- clinical audit or clinical governance leads
- others who are responsible for supporting staff in carrying out clinical audits, such as educational or clinical supervisors.

In accordance with *Criteria and Indicators of Best Practice in Clinical Audit*,¹ clinical audit data have to be analysed and the results reported in a way that maximises the impact of the clinical audit. The indicators related to this criterion are in the box.

Indicators for analysis and reporting of clinical audit data

Results of the clinical audit are presented in the most appropriate manner for each potential audience to ensure the audit results stimulate and support action planning.

The results are communicated effectively to all key stakeholders, including to patients. Communication can be done through presentations at meetings, in written reports, posters, etc, in such a form as to be easily understood.

This guide is about improving the quality of clinical audit presentations and reports. It is also about producing presentations and reports that can be easily read and interpreted by patients and others who are interested in the clinical audits that healthcare organisations are doing.

1.2 How the guide is intended to help

There are several ways to present a clinical audit, for example, as a written report, an oral presentation, a poster, a summary or an article. This guide is intended to help you to:

- inform patients and the public about the quality of care provided by clinical services in the organisation and actions that have been taken to improve patient care
- develop your own specifications for presentations or reports on clinical audits, particularly for the range of people who will need or want to learn about clinical audits
- be clear about what to include in any type of presentation on clinical audit.

2 How to decide what clinical audit information to present

To develop a presentation or report on a clinical audit, include the following:

- **who** the audience will be or is likely to be
- what you would like the audience to **do with** the information you provide
- the **knowledge and skills** among the audience in relation to clinical audit
- how much **time** the audience has to read the report
- the **audience's expectations** about clinical audit reports.

2.1 Intended audience

You may be preparing a clinical audit presentation or report for any or all of the following groups:

- patients
- other people who use healthcare services
- patients' and service users' families
- members of the public
- members of Local Involvement Networks (LINks) or Oversight Scrutiny Committees
- others who are interested in being able to understand the findings of clinical audits.

Make notes about what you know about the intended audience using the questions in the box as a guide. Also, consider what you have learned from audiences of previously prepared clinical audit reports.

Questions you should consider when presenting a clinical audit

What is the **background** of the audience in relation **to the subject** of the clinical audit? For example, are they people who have used the clinical service(s) involved in the audit?

How **familiar** is the audience **with clinical audit**? For example, is this the first time the audience has had a document on a clinical audit to read?

What **experience** has the audience already had **with clinical audit**, if any? If the people in the audience have been involved in clinical audit previously, was it a positive experience?

What is the audience's **expectations** about clinical audit and reading and understanding reports? For example, will people's attitudes be that it will be hard if not impossible to interpret the data and understand what is being said?

How have people **reacted to clinical audit presentations or reports in the past**? Have they got the key messages from previous presentations or reports?

What **feedback**, if any, have you received on **previously prepared** clinical audit presentations or reports? Have **people** reading clinical audit reports in the past commented **on the way the findings were presented**? For example, did people understand data presented in a bar chart rather than in a table?

2.2 What the intended audience should gain from the information

Choose the **key messages you want to get across** about a clinical audit, and how you would know if the audience understands your key messages. Your overall message should be that the clinical service or the organisation recognises its commitment to ensure that patients receive the right care. The clinical audit you are presenting may have other key messages to be delivered as well such as what is being done well, what was being done not-so-well, and the improvements that have been achieved as a result of the audit.

In addition to learning about a clinical audit, you might want your audience to:

- be assured that patients are getting the right care now
- be assured that the organisation recognises the need for improvement and is taking or has taken action to achieve improvements in patient care
- understand the problems that can affect the quality of patient care that can happen in a healthcare organisation.

You may also want your audience to actively participate in the clinical audit and quality improvement process through:

- offering ideas on possible causes of the problems identified, particularly if the audit is about how patients are involved in their care
- sharing what they have learned about clinical audit with others, including other patients or families
- suggesting ways in which the clinical audit can contribute to improved care for other groups of patients, for example, by implementing improvements made in one clinic to another clinic
- actively participating in future clinical audits.

2.3 The audience's knowledge and skills in relation to clinical audit

After you have identified your key messages and what you want the audience to learn, consider the knowledge and skills people need about clinical audit in general such as what clinical audit is about or how the clinical audit process works, as well as about the clinical audit you are presenting.

When reviewing the audience's knowledge and skills, think about:

- the subject of the audit—is it straightforward or will the importance of the subject have to be explained?
- the complexity of the design of the audit and the findings, that is, the number of aspects of care included in the audit and if the findings are related to different groups of patients
- if there are any special terms or concepts you will need to explain.

Consider the knowledge and skills needed to understand the content of your report and your audience's likely knowledge and skills and decide how your content or presentation will fill in the gaps.

If there are special terms, explain clearly the meaning of the terms and concepts in the presentation or report or in a separate section, for example, in a glossary of terms. Guidance for presenting and explaining terminology is in the box.

How to use terminology in a clinical audit report

Use **terms** or ideas that are familiar to the audience as much as possible. **Don't use special terms unless you really have to.**

Limit the number of **new terms** you use.

Always **define** or explain **new terms by using words** or ideas that are **already familiar** to the people in the audience and give one or more examples.

If new terms you are using **are similar** or are very closely related in meaning, **be** very clear **about the differences** in meanings of the terms.

Include a **glossary** of terms, if needed.

2.4 How much time the audience has

Think about a realistic time your audience might be willing to devote to reading a clinical audit report. Then make the decisions about the length and style of the presentation or report, using the decisions in the box as a guide.

Key features of your clinical audit presentation or report

The absolute **priority messages** the people in the audience have to get

The main parts of the presentation or report for the audience

If you are preparing a report, the number of words or pages to allocate in total and for each part

If you will use **tables, figures, or other illustrations** to illustrate your priority messages, and if so, how many and which ones

If you do not already know what audiences of your clinical audit presentation or reports will need to know or if you want to verify your decisions, you could informally ask patients individually or in a focus group about their knowledge of clinical audit and what they would want to learn about a clinical audit and their preferred format.

You may have to tailor a clinical audit presentation for different groups within your audience.

3 How to present clinical audit information

A clinical audit presentation or report should provide patients and others with an account of the design of the audit and how the quality of care was measured, the results of data collection and analysis, and what the audit has achieved. A presentation or report should help an audience learn about, understand and, perhaps, question a clinical audit.

3.1 What a clinical audit presentation or report should show

Include the following information in a clinical audit presentation or report for patients and others:

- **what** the clinical audit is about
- **why** the audit was done
- the **standards** that were used
- **how** it was done
- **what was learned** about the quality of patient care
- **what was done** about the findings
- **how successful actions** taken on the findings have been in achieving improvements.

If it is important for patients to know about the audit at an interim stage, for example, in order to participate in the analysis of problems revealed by audit findings and their causes, you could prepare a presentation of the initial findings or an interim report. Otherwise, a clinical audit report should cover the entire audit process so that patients and the public can be assured that the organisation is serious about taking action to achieve real improvements in patient care.

For a more detailed description of contents of a clinical audit report, see the HQIP publication *Template for Clinical Audit Report* at www.hqip.org.uk.

3.2 How to present analysis of problems and causes

A key summary of results should highlight any problems and their causes clearly and concisely for the following reasons:

- Everyone involved can have a shared understanding of exactly what the shortcomings in patient care are.
- The problem statement is the basis for analysing root causes and for planning actions to achieve improvements.
- You can inform others about the problems found through the clinical audit and their causes.

The report may end at this point if its purpose is to engage patients to co-develop an action plan. If not, then clear recommendations and the actions that were implemented should be presented.

4 How to disseminate clinical audit information

4.1 Deciding who should receive clinical audit information

Individual clinical audits can have a large number of stakeholders including patients and the public. There are likely to be several clinical audits being undertaken at any one time in a healthcare organisation. Therefore, there needs to be a balance between providing people with information that they should have about the findings and outcomes of clinical audits and inundating people with information.

A way to decide on who should receive information about clinical audits is to create a matrix of potential recipients of the information and what should be shared by:

- making a list of the groups in the audience, for example, patients, carers or families
- adding any other stakeholders who should be informed about clinical audits, for example, managers, staff and other organisations
- creating a grid with the groups listed down the left-hand side and information to be shared listed across the top
- for each group, indicating the type of information to be shared by placing a tick in the relevant space
- if a group could receive more than one type of information, subdividing the group and specifying for each sub-group the information to be shared.

A sample of a dissemination planning matrix is in the box.

Group/ stakeholder	Information to be shared					
	Detailed description of the entire audit	Overview of the entire audit	Key audit findings, actions taken and impact of actions on quality	Only title and status, for example, completed, awaiting repeat measurement	How to get more information	Who to contact to get involved
Patients who attend a clinic		✓			✓	✓
Patients who attend a primary care centre		✓			✓	✓
Members of the public			✓		✓	✓
Carers and families of patients		✓			✓	✓
Managers of services involved	✓				✓	
Managers of other services			✓	✓	✓	
.....						

4.2 Deciding on methods for dissemination of clinical audit information

There are a number of ways that clinical audit information can be shared. Media for sharing clinical audit information include reports, presentations, publications, articles, posters and flyers. Ways these can be disseminated can include mailings, meetings, LINKs groups, notice boards in clinical areas, websites, newsletters or local media.²

Suggestions for ways to disseminate information are in the box.

Options for disseminating clinical audit information	
Local or regional options	National or international options
Reports of clinical audits available via the organisation's website	Poster for presentation at national or international conferences
Poster display in: <ul style="list-style-type: none"> • a public area in the organisation such as entrance foyers, food service areas or major corridors • a patient care area such as a clinic or ward 	Presentation of a paper at national or international conferences Article on the work submitted to a professional journal
Handout staff members can give to patients and/or carers	Article on the work submitted to patient organisation publications, newsletters or websites
Regular printed organisation newsletter on quality improvement, clinical audit and related work	
Electronic newsletter to interested individuals	
Annual conference held within the organisation or within local organisations with active patient participation	
Annual competition for the best quality improvement/clinical audit projects that actively involved patients	
Flyers or leaflets distributed by post or available in wards, primary care centres, clinics, etc	
Press releases for local newspapers or newsletters	
Briefing for local committees and groups	
Regular summary reports available through mechanisms used to communicate with LINKs or with the public	

You could add codes in each cell in your dissemination matrix, such as P for poster, F for flyer or W for web page, to indicate how you plan to disseminate information.

4.3 Use of posters and flyers

Suggestions and advice for the content and preparation of posters and flyers are in the box.³⁻⁷

Advice on preparation of posters and flyers

Posters

- Information in a poster should be self-explanatory. You won't be there to describe the clinical audit.
- Keep the information simple.
- Don't overcrowd the poster and risk overwhelming the audience.
- Build the presentation around a few key overall points and then select two or three key points within each section that relate to the overall points.
- Use technical words only when needed.
- Use a font size that can be read from across the room, or at least a few feet away, 24 to 36 points.
- Use pictures or graphics that are easily understood, big and colourful.
- Divide the poster into boxes or sections with the title at the top, the most important information at the top and centre and the least important information at the bottom.
- If possible or desirable, supplement a poster with a handout so people can take a summary with them.

Flyers

- Follow the principles for posters.
- Make sure that all the content is clear and accurate.
- Make the layout easy to read.
- Use a clear font.
- Write in simple everyday language.
- Limit the flyer to both sides of an A4 sheet of paper.

5 How to test a clinical audit presentation or report

When you have developed a clinical audit presentation or report, test the appropriateness and acceptability of the material for the intended audience. You could do any of the following to test your presentation or report:

- Before distribution, give the presentation to a few individuals who are representative of your intended audience. You could start by asking non-clinical staff to look at your presentation and give you feedback and then move on to asking a few patients to read the document.
- Before distribution, ask someone in your organisation who is considered expert in developing materials for the intended audience to review your presentation and give you feedback.
- Send an evaluation form with your presentation or shortly after, asking for feedback.

The feedback you get either formally or informally will help you to continue to prepare clinical audit presentations or reports that your audiences will understand.

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Further reading

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