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In-Depth Assessment – Exploratory Assessment Recipient Interview Guide – Clinical Quality Measure – WISEWOMAN

Exploratory Assessment
Recipient Interview Guide

Date of Interview			
Interviewer			
Notetaker			
Organization Name			
Organization Type			
State			
Organization City		**Zip Code**	
Cooperative Agreement	☐ WISEWOMAN		
Strategy	Strategy 1: Track and Monitor Clinical Measures		
Interviewee Name(s)			
Interviewee Role(s) or Title(s)			

Introduction

Thank you for taking the time to participate in this interview. My name is <Insert name> and I am with the Deloitte evaluation team. Our team is working with the CDC Division for Heart Disease and Stroke Prevention to evaluate the <Insert Cooperative Agreement>. As part of the larger evaluation, we are seeking to learn more about the effectiveness of Strategy 1: Track and Monitor Clinical Measures at the site level and gain insights on sustainability and program replicability. The information you share will provide valuable insights on approaches for promoting use of electronic health records and health information technology, and standardized processes or tools for Clinical Quality Measurement and help us understand which approaches seem to work well in specific contexts.

This interview is expected to take no longer than 90 minutes. Your participation in this interview is completely voluntary. You may choose not to respond to questions at any time and it will not in any way impact the funding or technical assistance to your organizations receive from CDC. All information will be kept secure and any personally identifiable information will be removed when results are aggregated for analysis.

During this interview we will be referencing back to information gathered during the Evaluability Assessment interviews to further understand how things may have changed or remained the same since <September 2024 through September 2025>. If you did not participate in the Evaluability Assessment or were not yet with <recipient organization> we understand that you may not be able to speak to everything that is referenced. We still value your input and are interested in learning about what is currently happening at your organization.

If at any time during the interview you are not clear about what we are asking, be sure to let me know. Please answer questions based on your own knowledge and experience. We appreciate your candid answers and hope that today's interview can be a conversation among participants. Please let us know when things your colleagues are saying resonate with your experience or when your experience has been different.

Do you consent to this interview?

☐ Yes
☐ No

With your permission, we would like to record this interview for transcription purposes.
Do we have your permission to record?
☐ Yes
☐ No

Do you have any questions or concerns before we start the interview?

Background

Thank you again for agreeing to participate in this interview. For reference, for today's interview we will be talking about Strategy 1, which is focused on tracking and monitoring clinical measures.

I'd like to start with some questions to understand the work <name of recipient organization> is doing to support patients at risk of or with CVD, and also understand your role within the organization.

1. During the Evaluability Assessment it was shared that you <personal role in relation to supporting strategy approaches>. Is this still true or has this changed since we last spoke?
   Probes:
   - How long have you been working with <organization name>?
   - How long have you been in this role?
   - Can you tell me about your role in relation to supporting the implementation of EHRs and/or CQM-related efforts?
   - How many years have you been working on CQM-related work within your organization?

Support for CQM Strategies

We'd like to learn more about how recipients are supporting CQM strategies. We are particularly interested in learning how things have changed since our last round of discussions in <insert time e.g., Fall 2025> during the Evaluability Assessment. We will summarize what we heard about implementation during the key informant interviews and ask you to confirm if the activities are the same or have changed.

2. In the Evaluability Assessment interview, <you, key personnel from your organization> shared that <recipient organization> supports the implementation of <CQM activities> by <actions described in the last interview>. Is this still true or has it changed since we last spoke?
   Probes:
   - What has changed in the past two years? Why did you make these changes?
     - How has your role and the support you provide changed?
     - How have you expanded <activities>? What progress has been made? Tell us more about key achievements and major milestones.
     - Are there any unique or novel approaches that you would like to highlight?
   - [If no longer implementing the program activity] Why are you no longer implementing? What are you doing in place of the <activity>?

For the next topic of discussion, we would like to explore the partnerships between <recipient organization> and partner organizations. Please think about the process of working together to implement <activities related to CQM strategies>.

3. Does your organization still have a partnership with <names of partners reported in the Evaluability Assessment>?
   Probes:
   - Have there been any changes (i.e., added or removed partnerships) to your organization's partnerships since we last spoke?
     - [If partner added] Why was this partner added?
       - Was this partnership planned?
       - Was there an unexpected gap identified?
     - [If partner removed] Why was this partner removed?
       - Was this removal planned?
       - Were there challenges that existed with this partnership?

4. Can you describe any key actions or characteristics you feel mattered most in facilitating an effective and beneficial partnership with your partner organizations?

5. Is there anything you would want to change in your collaboration to improve your partnerships?
   Probes:
   - What are the gaps in your current partnerships?
     - [If there are gaps] How does your organization plan to overcome these gaps?

Next, we'd like to discuss any new or ongoing challenges that <Recipient Organization> is encountering when implementing or supporting the implementation of <activities related to CQM> and ways that the organization has overcome these challenges or any additional support the organization may need to overcome them.

[*Interviewer Note:* Reference challenges and barriers mentioned in the Evaluability Assessment key informant interviews by participants, probe for new or ongoing challenges.]

6. During the key informant interviews for the Evaluability Assessment, we heard that <challenges and barriers referenced> were some of the challenges for implementing or supporting the implementation of CQM strategies. Have these challenges persisted?
   [*Interviewer Note:* For the next question, only describe relevant sub-strategies for which the recipient organization has self-nominated.]
   Probes:
   - Have challenges persisted with:
     - 1A: providing CVD risk assessments?
     - 1B: integrating/aligning EHRs and HIT within provider workflows?
     - 1C: using standardized procedures?
     - 1D: using metrics from program data to guide quality improvement activities?
     - 1E: identifying differences in health outcomes through the use of EHR, HIT, or program data?
   - How did your organization resolve these challenges?

7. Have any new challenges emerged?

Probes:

- How is your organization addressing these challenges?
- What support, TA, or resources does your organization need to overcome these challenges?

8. What factors have helped to support <activities related to tracking and monitoring clinical measures>?
   Probe:
   - How did these factors provide support for <CQM activities>?

We're interested in learning about changes since we last spoke related to the external or contextual factors that may support or hinder <CQM activities> such as state or organizational policies or guidelines, other initiatives, or cooperative agreements.

9. During the Evaluability Assessment it was shared that <contextual factors that support or hinder activities related to tracking and monitoring clinical measures>. Have there been any changes in these contextual factors?
   Probe:
   - Have there been any recent policy level or other external changes within your jurisdiction that impact your <CQM efforts>? What about changes within your organization or partner organizations?

[*Interviewer Note*: Only ask the next set of questions if the recipient organization participates in more than one NOFO. Otherwise, move on to the Effectiveness of CQM Activities section.]

In addition to receiving funding from <insert cooperative agreement being interviewed for> you also receive funding from <The National CVH Program, The Innovative CVH Program, WISEWOMAN program>. [If applicable to recipient: We are also aware that <recipient in same state or jurisdiction> received funding from < name of cooperative agreement> and are interested in how your organization is coordinating with <other recipient organization>. These next questions will focus on any changes since we last spoke related to participating in and coordinating with multiple cooperative agreements.

10. During the Evaluability Assessment we learned that your organization was <coordination across NOFO name(s)>. Is this still an accurate reflection of how your organization is coordinating across <NOFO name(s)>? Have there been any changes since we last spoke?
    Probes:
    - How is your organization coordinating across <NOFO name(s)> to maximize resources and avoid duplication of effort?
      - How does your organization leverage funding across NOFOs?
      - How does your organization leverage partnerships across NOFOs?
      - How has your organization coordinated resources for shared impact across NOFOs?
      - [If implementing both the National and Innovative CVH Programs] How are you coordinating learning collaboratives for The National and Innovative CVH Programs?

11. During our last interview we heard that <advantages of participating in or coordinating with multiple NOFOs referenced in previous interview>, have these advantages persisted?
    Probes:

- Have any new advantages of participating in and/or coordinating with multiple NOFOs emerged?
- How has participating in and/or coordinating with multiple NOFOs helped to maximize the impact of hypertension control and other CVD outcomes?

12. In the previous interview <you/your colleague> referenced that challenges to participating in more than one NOFO or coordinating with other NOFOs included <challenges referenced in previous interview>. Have these challenges persisted?
    Probes:
    - Have any new challenges emerged with participating in and/or coordinating with more than one NOFO?
    - How has your organization addressed these challenges?

Effectiveness of CQM Activities

The following questions are going to ask you about effective practices for implementing program strategies. We are interested in learning more about the resources and support provided to partner organizations for implementing <CQM activities>.

[*Interviewer Note:* Only ask questions aligned to the sub-strategy for which the recipient has self-nominated.]

[*Interviewer Note:* For Questions 13 through 17, be familiar with the previous logic model/measures so that we can probe if there is no mention about outcomes that were going to be tracked or were previously reported, as indicated in the Evaluability Assessment/Performance Measure Monitoring/Evaluation Reports.]

13. [1A] How has the use of CVD risk assessments among the population of focus (i.e., under- and uninsured participants between the ages of 35-64 years) affected the identification of patients at risk or with CVD?
    Probes:
    - What types of resources or support were most helpful to partners?
    - What activities were most helpful for supporting partners in providing CVD risk assessments?
    - What activities were most helpful to strengthen or create new processes or workflows to provide CVD risk assessments?
    - What specific changes have you observed that have resulted from <above activities>?
    - How has the use of <above activities> contributed to achieving <short-term outcomes identified in Evaluability Assessment and other program materials>? How have these activities contributed to achieving <intermediate outcomes>?
    - How has the use of <above activities> contributed to addressing differences in health outcomes?

14. [1B] How has the use of EHR/HIT affected identification, monitoring, and tracking of clinical and social services and support needs?
    Probes:
    - What types of resources or support were most helpful to partners?
    - What activities were most helpful for:
        - Identifying patient's needs?

    - Assessing and tracking patient's needs?
    - Tracking referrals and utilization of services?
- What activities were most helpful to strengthen or create new processes or workflows to use EHR/HIT to identify patients in need of clinical and social support services?
- What specific changes have you observed that have resulted from <above activities>?
- How has the use of <above activities> contributed to achieving <short-term outcomes identified in Evaluability Assessment and other program materials>? How have these activities contributed to achieving <intermediate outcomes>?
- How has the use of <above activities> contributed to addressing differences in health outcomes?

15. [1C] How has the use of new processes or tools affected the identification of social services and support needs of patients at highest risk of CVD?

Probes:

- What types of resources or support were most helpful to partners?
- What activities were helpful for:
    - Identifying social services and support needs?
    - Monitoring and assessing referrals?
    - Monitoring and assessing utilization of services?
- What activities were most helpful to strengthen or create new processes or workflows to use standardized procedures to identify patients in need of clinical and social support services?
- What specific changes have you observed that have resulted from <above activities>?
- How has the use of <above activities> contributed to achieving <short-term outcomes identified in Evaluability Assessment and other program materials>? How have these activities contributed to achieving <intermediate outcomes>?
- How has the use of <above activities> contributed to addressing differences in health outcomes?

16. [1D] How has the use of metrics from program data affected quality improvement activities?

Probes:

- What types of resources or support were most helpful to partners?
- What activities were helpful for increasing:
    - Program enrollment?
    - Patient retention?
    - Referrals to additional services?
- What activities were most helpful to strengthen or create new processes or workflows to use program metric data to guide quality improvement activities?
- What specific changes have you observed that have resulted from <above activities>?
- How has the use of <above activities> contributed to achieving <short-term outcomes identified in Evaluability Assessment and other program materials>? How have these activities contributed to achieving <intermediate outcomes>?
- How has the use of <above activities> contributed to addressing differences in health outcomes?

17. [1E] How has the use of EHR, HIT, or program data affected the identification of differences in health outcomes?

Probes:

- What types of resources or support were most helpful to partners?
- What activities were helpful for:
    - Identifying differences in health outcomes?

    - Addressing health outcomes?
- What activities were most helpful to strengthen or create new processes or workflows to use EHR/HIT to identify differences in health outcomes?
- What specific changes have you observed that have resulted from <above activities>?
- How has the use of <above activities> contributed to achieving <short-term outcomes identified in Evaluability Assessment and other program materials>? How have these activities contributed to achieving <intermediate outcomes>?

Now we will ask you questions about reaching your population of focus and health outcomes.

18. As indicated from <Evaluability Assessment, document review, etc.>, the population of focus for your organization are <population of focus identified>. How effective is your organization in reaching your population of focus?
    Probes:
    - How are <CQM activities> designed to address specific needs of the <population of focus>?
    - How does your organization ensure that <CQM activities> are adaptable to meet the needs of <population of focus>?
    - What are examples of how program feedback (e.g., from quality improvement efforts, program data, evaluation data) has been incorporated to improve program implementation?
    - How does your organization define reach?
        - What metrics did your organization use to measure reach?
        - What are the findings?
    - How has reach amongst the <population of focus> changed?
    - What are barriers that your organization encountered in reaching the population of focus?
        - What has helped your organization reach your population?

[*Interviewer Note:* For Question 19, be familiar with the previous logic model/measures so that we can probe if there is no mention about outcomes that were going to be tracked or were previously reported, as indicated in the Evaluability Assessment/Performance Measure Monitoring/Evaluation Reports.]

19. How do <CQM activities being implemented by the Recipient and partner organizations> contribute to patient level health outcomes?
    Probes:
    - What changes in health outcomes has your organization observed or measured?
    - How do <CQM activities being implemented by the Recipient and partner organizations> support patients at risk of and with CVD?
    - What factors support or hinder your organization's ability to meet patient needs?

[*Interviewer Note:* For Question 21, be familiar with the previous logic model/measures so that we can probe if there is no mention about outcomes that were going to be tracked or were previously reported, as indicated in the Evaluability Assessment/Performance Measure Monitoring/Evaluation Reports.]

20. Have there been any measurable changes in differences in health outcomesas a result of <CQM activities being implemented by the Recipient and partner organizations>?
    Probes:
    - If yes:
        - What are specific examples of how differences in health outcomes were addressed through the implementation of <CQM strategy>?

    - How does <Recipient and partner activities related to CQM strategy implementation> address gaps in care for your population of focus?
- If no:
    - Are there any barriers that affect your ability to address differences in health outcomes? Please describe.
    - Are there any barriers to measuring differences in health outcomes?
- What additional resources are needed to address patient's unmet needs?

21. What other outcomes, intended or unintended, have come out because of these implemented strategies?
    Probe:
    - [If recipient reports an unintended outcome] Can you elaborate on the unintended outcome and why this may have resulted?

22. Can you tell us about any processes or outcomes that your organization has achieved as a result of these implemented strategies that you are especially proud of?

Sustainability

For the following questions, we are interested in learning more about your plans and preparation for sustaining the activities related to CQM after the completion of the cooperative agreement.

[*Interviewer Note:* Some WISEWOMAN recipients may perceive sustainability differently than other cooperative agreement recipients since it is a direct services program.]

23. [1A] What steps has your organization taken to ensure that partners can sustain providing CVD risk assessments for their patients?
    Probe:
    - Can you share any challenges faced in supporting partners providing CVD risk assessments and how they were addressed?

24. [1B] What steps has your organization taken to ensure that partners can sustain tracking and monitoring clinical and social services and support needs measures for their patients?
    Probe:
    - Can you share any challenges faced in supporting partners in tracking and measuring clinical and social services and support needs and how they were addressed?

25. [1C] What steps has your organization taken to ensure that partners can sustain new processes or tools to identify patient social services and support needs and monitor patient's utilization of these services?
    Probe:
    - Can you share any challenges faced in supporting partners in using new processes or tools and how they were addressed?

26. [1D] What steps has your organization taken to ensure that partners can sustain use of program metric data to guide quality improvement activities to increase program enrollment, retention, and referrals to services?
    Probe:

- Can you share any challenges faced in supporting partners in using program metric data and how they were addressed?

27. [1E] What steps has your organization taken to ensure that partners can sustain use of EHR, HIT, and program data to identify and address differences in health outcomes?
    Probe:
    - Can you share any challenges faced in supporting partners in using EHR, HIT, or program data and how they were addressed?

28. Are any modifications needed to ensure sustainability? If so, what modifications are needed?
    Probe:
    - What additional support, TA, or resources are needed to improve sustainability?

[*Interviewer Note:* Only ask the questions that align with the sub-strategy for which the recipient organization self-nominated]

29. [1A] How do you plan to proceed with activities related to supporting the use of CVD risk assessments after completing the cooperative agreement?

30. [1B] How do you plan to proceed with activities related to supporting the use of EHRs/HIT and CQMs to identify social services and support needs of patients after completing the cooperative agreement?

31. [1C] How do you plan to proceed with activities related to supporting the use of standardized processes or tools to identify social services and support needs of patients after completing the cooperative agreement?

32. [1D] How do you plan to proceed with activities related to supporting the use of quality improvement activities to increasing program enrollment, retention, and referrals to services after completing the cooperative agreement?

33. [1E] How do you plan to proceed with activities related to supporting the use of EHRs, HIT, and program data to identify differences in health outcomes after completing the cooperative agreement?

34. Once the cooperative agreement ends, are there any aspects of <CQM related activities> you will not continue? Are there aspects that you would like to continue but do not feel like you could sustain?

35. Aside from funding, is there any resource, tool, or any type of additional support that would be beneficial to continuing <CQM activities being implemented by the Recipient and partner organizations> after the cooperative agreement?

Scalability and Replicability

36. What insights can other organizations gain from your organization's successes or challenges with <strategy implementation>?
    Probes:
    - Can you share any lessons learned that could be beneficial for similar programs?
    - How can successful activities be replicated elsewhere? How could other organizations implement similar activities?

Special Topics

[*Interviewer Note:* Only ask these questions if the recipient organization is working on cardiac rehabilitation, hypertension in women, and/or hypertension in pregnant or postpartum women. If not, then skip to end and close out the interview]

[*Interviewer Note*: Ask questions 38-42 if recipient share that they implement cardiac rehab during the Evaluability Assessments]

37. In the Evaluability Assessment interview, <you, key personnel from your organization> shared that <recipient organization> implements cardiac rehabilitation. Is this still true or has it changed since we last spoke?
    Probes:
    - What has changed in the past two years? Why did you make these changes?
        - How have you expanded <activities>? What progress has been made?
        - Tell us more about key achievements and major milestones.
        - Are there any unique or novel approaches that you would like to highlight?
    - [If no longer implementing the program activity] Why are you no longer implementing?

38. What factors have helped to support <cardiac rehabilitation activities>?

39. What challenges have you experienced with < cardiac rehabilitation activities >?
    Probes:
    - How are these challenges addressed? What solutions helped to minimize barriers?
    - What support, resources, or TA do you need to overcome these barriers?

40. Have there been any measurable improvements in patient level outcomes as a result of <cardiac rehabilitation activities >?
    Probes:
    - What changes in health outcomes has your organization observed or measured?

41. How do < cardiac rehabilitation activities > contribute to addressing differences in health outcomes?

[*Interviewer Note*: Ask questions 43-47 if recipient stated that they implement activities related to pregnant or postpartum women during the Evaluability Assessments]

42. In the Evaluability Assessment interview, <you, key personnel from your organization> shared that <recipient organization> focuses on hypertension control in pregnancy and postpartum. Is this still true or has it changed since we last spoke?
    Probes:
    - What has changed in the past two years? Why did you make these changes?
        - How have you expanded <activities>? What progress has been made?
        - Tell us more about key achievements and major milestones.
        - Are there any unique or novel approaches that you would like to highlight?
    - [If no longer implementing the program activity] Why are you no longer implementing?

43. What factors have helped to support < activities related to hypertension control in pregnancy or postpartum>?

44. What challenges have you experienced with < activities related to hypertension control in pregnancy or postpartum >?

Probes:

- How are these challenges addressed? What solutions helped to minimize barriers?
- What support, resources, or TA do you need to overcome these barriers?

45. Have there been any measurable improvements in patient level outcomes as a result of < activities related to hypertension control in pregnancy or postpartum >?
    Probes:
    - What changes in health outcomes has your organization observed or measured?

46. How do < activities related to hypertension control in pregnancy or postpartum > contribute to addressing differences in health outcomes?

Close

Lastly, what questions do you have for me? Is there anything else you'd like to share?

Thank you for your time. This concludes our interview about the implementing clinical quality measures strategy for the <Insert cooperative agreement>. If you have any additional questions, please feel free to contact the Comprehensive Evaluation Team, hdsp_nofo_eval@cdc.gov.