

## Creating an Annual Action Plan for a Health Service Integration Initiative

### Description:

This tool supports the implementation of the strategy that has been formulated and approved. It also provides information that will help develop a performance-based annual action plan for the health service integration initiative.

### How it can be used:

This tool outlines the critical elements that have to be considered when developing a performance-based annual action plan. The tool provides directional steps for the development of an annual action plan and outlines who is responsible for implementation and meeting reporting requirements for stakeholders. It also provides the leadership group for the health service integration initiative with performance indicators to monitor progress as they move forward on their journey to achieving their strategies and outcomes.

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### Key Annual Action Plan Steps

The basic steps to follow to develop and implement a successful Annual Action Plan for a health services integration initiative and its strategies are:

1. Develop "how to" or action activities that are to be undertaken to support the strategy being achieved.
2. Identify the individuals responsible for working on action items for each strategy.
3. Indicate the best start and finish date based on information provided by those involved.
4. Determine and show the budget impact to undertake the action items for each strategy.
5. Develop performance indicators to assist in measuring the level of success for the actions supporting the strategies.
6. Consolidate the action activities for each strategy and other relevant information such as assumptions for the health service integration initiative into an Annual Action Plan.
7. Obtain approvals from key stakeholders for the Annual Action Plan.
8. Identify policy changes required to support implementation of the approved Annual Action Plan.
9. If required, undertake organizational structural changes to support implementation of the Annual Action Plan.
10. Assign responsibility to groups or individuals to extract relevant information and prepare a Work Activity Plan. The plan would include the information noted in items 1-5 noted above and also include a column or line for reporting on progress monthly.
11. There should be a standing agenda item to monitor the Work Activity Plans for each meeting of the group responsible for the health service integration initiative.
12. Based on monitoring of the plans, adjust strategy and supportive actions, if necessary.

### Sample Information

The first five of the twelve steps are captured in the following example.

#### Sample Strategy

***Improve discharge planning activities between the Plains Regional Health Authority and the First Nations communities in the Central Region Tribal Council, and reduce the number of unsatisfactory incidents to zero within the next three years.***

1. Identify a group of local champions and obtain related information on discharge planning activities.
  - Responsibility: Health Director with health managers and other relevant staff, volunteers and leaders
  - Start Date: August 01/17
  - Finish Date: October 31/17
  - Budget Impact: Coffee and snacks \$300
  - Performance Indicators: Number of meetings held; required information obtained.
  
2. Hold meetings with key leaders to share the findings on discharge planning activities and discuss how a health service integration initiative in this area could result in improvements to the quality of discharge planning activities. Obtain approval to proceed and arrange for funding, participation and agreements, as required.
  - Responsibility: Health Director, Health Board Chair, Chief and Council and/or Tribal Council
  - Start Date: November 01/17
  - Finish Date: February 27/18
  - Budget Impact: Budgeted staff time
  - Performance Indicators: Meeting held; approval obtained; funding obtained; key stakeholders agreed to participate.
  
3. Advise community members about the initiative to be undertaken.
  - Responsibility: Integration Coordinator with Health Director, Health Board Chair, Health Portfolio Councillor
  - Start Date: April 01/18
  - Finish Date: May 31/18
  - Budget Impact: Budgeted staff time
  - Performance Indicators: Mentioned at a general meeting; story in the community newsletter; press release for the local media.
  
4. Hold meetings with stakeholders involved in discharge planning to understand and discuss culture and policies, and review current practices. Identify the number of unsatisfactory incidents and related opportunities for improvement, and develop a plan to reduce the incidents to zero. Include performance indicators.
  - Responsibility: Integration Coordinator, assigned participants, with Health Directors
  - Start Date: June 01/18
  - Finish Date; October 31/18
  - Budget Impact: Meeting participation costs \$2,000 per community and budgeted staff time
  - Performance Indicators: Number of meetings and recommendations for improvement

#### 5. Other Activities

Add other activities to meet cultural and policy requirements of the applicable organization. Other activities could include: holding meetings with key leaders to inform them of the plan and gather input; keeping the community informed; reporting on monitoring activities to key stakeholders; etc.

### **Performance Indicators**

How do you know if you are achieving the desired results of your strategic and annual action plans? The best approach is to measure what you control or are responsible for, and understand how it is linked to performance and the strategic direction.

Key performance indicators are important measurement tools. They can be established from the point of view of economy, efficiency, effectiveness, service quality, and health outcomes. They can apply to areas such as resources, community engagement, client satisfaction, programs and services activity.

In effect, they assist in making strategic objectives clear; focus on core processes and critical variables; signal where performance is headed; identify what requires attention and improvement; provide accountability; and serve as a basis for reward. Examples of indicators are:

- Number of discharges without incident;
- Number of clients unable to access the necessary care within the specified standards;
- Client satisfaction after accessing services;
- Client wait times.

### **Key Questions to Ask in Developing Performance Indicators and Setting Targets**

1. What are critical indicators of success for the health service integration initiative from a stakeholder point of view?
2. Can the name of the performance indicators adequately describe what is being measured without additional explanation?
3. Who will use the information to measure performance?
4. Is this a reliable way of measuring these activities and would it be recognized as valid by others in a similar situation?
5. Can the measurement occur without the need to establish complex and costly systems?
6. Are there any issues related to performance indicator data collection?
7. Are the components and data sources of the performance indicator in place?
8. Do new sources, processes and technology need to be developed?
9. Who will collect the performance indicator information?
10. How often will the data be collected?
11. Who will analyze the data?
12. Who will report the data and how often?
13. Who will receive the performance indicator reports?
14. Who will act on the performance indicator results?
15. Have individuals affected by the performance indicator targets been able to provide input into determining the targets?
16. Are the indicator targets realistic in terms of the organization's previous performance and capacities?
17. Will the targets be linked to other organizational processes such as employee and team performance evaluations?