

Identifying and Making Adjustments to your Health Service Integration Initiative

Description:

This tool provides an overview of the need to make adjustments and the steps to assess your own health service integration initiative.

How it can be used:

Just as you go for regular check-ups for your health, you need to regularly assess the health of your health service integration initiative. This will help you determine if all is going according to plan or if any adjustments are needed. Use this tool to guide you through a “healthcheck” of your health service integration initiative.

Your health service integration initiative won't always go as planned. That is a fact. What you need to know is how to identify where the issues are and how to make adjustments to the plans and processes as needed.

Consider running an initiative “healthcheck”. This process can help you identify when and if you need to make changes to your health service integration initiative. Some reasons for making adjustments may be:

- Activities might not be achieving success;
- Changes in governance;
- Political and/or policy changes;
- Lack of engagement or buy-in;
- New stakeholders that weren't included in the original plan;
- Goals and objectives weren't clear enough;
- Cultural considerations need to be more important, etc.;

A healthcheck can help you:

- Develop plans to bring the health service integration initiative back on track;
- Decide to work on an issue in a smaller forum;
- Bring energy and commitment back to a group that may be complacent or disheartened;
- Direct the health service integration initiative coordinator to revised goals;
- Orient new people to the working group or guiding group;
- Take the “pulse” of the group to ensure everyone is still on the same page.

The steps below describe how to conduct a healthcheck of your health service integration initiative and determine whether adjustments need to be made.

1. Determine the healthcheck's objectives.
 - a. What is our healthcheck meant to be assessing?
 - b. Who should be involved (Working group and/or guiding group)?
 - c. Do we need to involve any other stakeholders? If so, who?
 - d. How will we report on the results of our healthcheck (Report, Presentation)?
 - e. Who will make decisions on the results of our healthcheck?
2. Decide who will conduct the healthcheck. This depends on why the healthcheck is needed. What is the healthcheck's focus? Determine who has the appropriate understanding of the initiative, and the authority, experience and mindset to conduct the assessment.

- a. Understanding – If there is confidence in the health service integration initiative coordinator, then that person should conduct the healthcheck as he/she has the project knowledge. If not, consider an external person.
 - b. Authority – An external auditor is often used when routine audits are required. This ensures that all processes are being followed and alerts if changes need to be made.
 - c. Experience – Sometimes the health service integration initiative coordinator lacks expertise. In that case, find someone with more experience in project management. Sometimes an external consultant is used here.
 - d. Mindset – Because a healthcheck often results in adjustments to the health service integration initiative, the person conducting the assessment must have an open mind and be able to make recommendations without prejudice.
3. Determine how to proceed. How will you gather the information? Consider the following approaches.
 - a. Health service integration initiative deliverable reviews – Preview the deliverables received so far and assess the quality of the work. Other reports that could be reviewed include strategies, plans, mid-term reports, etc.
 - b. Interviews – Set up key informant interviews with group members from all partners and stakeholders. This will provide insight into the process and the deliverables. It can also help you gauge the level of awareness of the initiative and/or the outcomes to date.
 - c. Questionnaires – Create a short survey that will help gather information from a larger group of people. This could be an effective way to assess awareness or satisfaction from a large group of stakeholders, such as clients.
 - d. Workshops or focus groups – This is effective when you want to share information and gather perspectives.
 4. Conduct your healthcheck plan following a schedule of activities (as per #3 above).
 - a. Conduct the plan over a short period of time so that information is fresh and you can start to make necessary adjustments sooner.
 - b. Minimize disruption for the working group and health service integration initiative coordinator where possible.
 5. Present the results of your healthcheck. Agree on the next steps for making necessary adjustments.
 - a. Do the adjustments need to be made by the health service integration initiative coordinator, the working group, or the guiding group?
 - b. Confirm if any policy changes are required.
 - c. Redo any specific documents (e.g., annual plan) if they are affected by changes.
 - d. Are there any specific training requirements to bring people in line with health service integration initiative requirements?
 - e. Capture your results in the format already agreed upon, and distribute.