

## Managing Health Service Integration Initiative Projects

### Description:

This tool describes the key areas of project management and outlines the steps to follow in managing your health service integration initiative.

### How it can be used:

Project management best practices can be used to effectively manage your health service integration initiative. Activities relate to planning, implementing and controlling to achieve the interim milestones and the final outcomes. Follow the steps below to ensure your health service integration initiative progresses in an organized manner and helps ensure a successful outcome for your clients.

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### Key areas to consider when managing your health service integration initiative

- Project Initiation – Develop a solid understanding of the health service integration initiative goals and how all the elements fit together for a successful outcome.
- Scope management – Avoid the “all-too-common” habit of letting the scope of the health service integration initiative take on a life of its own. Develop a clear vision and regularly articulate the priorities regularly. Develop a process to manage necessary scope changes with guidelines to evaluate the changes.
- Schedule management – Clearly define the sequence of activities, with time allocated for each. Build in sufficient contingency time for any unexpected delays. (“expect the unexpected”). Develop a health service integration initiative schedule to keep the work on track.
- Cost management – Be systematic when estimating, budgeting and controlling the funds. Understand where the cost drivers are and develop a monitoring system.
- Quality management – The purpose of your health service integration initiative is to seek to improve health services for your clients. Ensure quality is front and centre in your planning and implementation.
- People management – The people working with and for your health service integration initiative can make or break the final outcome. Ensure the right mix of interpersonal and technical skills.
- Communication – Ensure the right people get the right messages at the right time in the right way. Your communication plan will guide you here.
- Risk management – Understand which risks are significant and develop a plan for monitoring and managing the risks.
- Procurement – Develop a policy or identify the process that will be used to acquire needed supplies.

### Project Management Steps

1. Create the health service integration initiative specifications.
  - a. Outline the specifications to provide a framework for keeping on track.
  - b. Describe purpose, goals and deliverables.
  - c. State parameters (e.g., timelines, budgets, range, scope, location, authority).
  - d. Outline the people involved and the way the team will work (e.g., frequency of meetings, decision-making process).
2. Plan the health service integration initiative.
  - a. Appoint the team early to maximize their ownership and buy-in to the project. Gain commitment from your team members.

- b. Create a definition statement which will help prevent you from going beyond the scope of the health service integration initiative.
  - c. Identify in detail what will and will not be included in the scope of the health service integration initiative.
  - d. Identify activities and establish relationships and links between various activities. Complex initiatives will have a number of activities running in parallel. Some parts will need other areas of the project to be completed before they can begin or progress. Such 'interdependent' parts of the health service integration initiative need extra consideration and planning.
  - e. Establish a milestone plan which describes what, when and how various elements will be measured.
  - f. Identify key roles and responsibilities for all team members.
  - g. Create a spreadsheet to plan and report on expenditures. The spreadsheet must enable you to plan, administer and report on the detailed finances of your health service integration initiative.
  - h. Identify all stakeholders and consider how to best consult with and involve them.
  - i. Create a risk analysis plan and conduct a high level analysis at this early stage. Avoid going into great detail; instead focus on an overview that identifies the key risks.
  - j. Create a contingency plan to anticipate and respond to unexpected circumstances.
  - k. Consider which tools you'll need. At a minimum, incorporate a Critical Path Analysis to show the order in which tasks must be performed and the relative importance of tasks. Although some tasks appear insignificant, they may actually be influential in enabling much more important activities to proceed.
3. Plan to communicate.
- a. Effective communication serves two purposes; it informs people and obtains essential support, agreement and commitment.
  - b. If your health service integration initiative is complex and involves a team, you should involve the team in the planning process to maximise buy-in, ownership, and accountability.
  - c. Create a communication plan that identifies objectives, timelines, channels, roles and responsibilities.
  - d. Consider how best to communicate your goals and process to those within your organization and other stakeholders. Involvement and communication are vital for cooperation and support. Failing to communicate, to people who might have less valuable input, but whose cooperation is crucial is a common reason for arousing suspicion and objections, defensiveness or resistance.
4. Begin the health service integration initiative activities.
- a. Based on your Critical Path Analysis, create a work breakdown structure or plan for the health service integration initiative. It will list all of the activities you will need to undertake.
  - b. Estimate how long each activity will take.
  - c. Clarify all roles and responsibilities for each activity. Activities need to be very clearly described, including all relevant parameters, timelines, costs, and deliverables.
  - d. Delegation is vital for successful project management involving teams. Distribute the full plan to the team and consider how to delegate medium- and long-term tasks. Long-term complex projects need to be planned in more detail. Only delegate tasks which pass the SMART test (Specific, Measurable, Achievable, Realistic, and Time-based).
  - e. Revise the project Critical Path Analysis, if necessary.
  - f. Update on progress through meetings. Regularly communicate progress and successes to everyone.
  - g. Review your communication plan regularly.

5. Monitor and measure progress.
  - a. Based on the milestone plan, review whether or not activities have been delivered on time. Be clear on what needs to be achieved to deliver the next milestone.
  - b. Check the progress of activities against the project plan.
  - c. Adjust the plan if necessary in light of performance, changing circumstances, and new information; but remain on track and within the original terms of reference.
  - d. Be sure to use transparent, pre-agreed measurements when judging performance.
  - e. Identify and delegate new actions as appropriate.
  - f. Inform team members and those in authority about developments; clearly, concisely and in writing.
  - g. Plan team meetings to review progress.
  - h. Develop an Issues Log to record items that may be causing concern.
  - i. Carry out a full risk analysis. Regularly review each risk to ensure it is being managed. If necessary, assign people to manage the various risks.
  - j. Incorporate a 'Planned vs. Actual form' which allows you to monitor how you are progressing with specific tasks. Link these forms into milestone reviews.
  - k. Appoint someone to be responsible for project quality, especially in larger projects.
  - l. Communicate as per the Communication Plan (e.g., one-page reports highlighting milestones and key issues, weekly update emails, etc.).
  
6. Review the results of the health service integration initiative.
  - a. At the end of your health service integration initiative, hold a final assessment meeting with the team to review your plan. Focus your meeting on learning and identifying what you can use on the next phase of the health service integration initiative. This is especially important for ongoing sustainable activities.
  - b. Reflect on successes gratefully and realistically. Reflect on any failures and mistakes positively, objectively, and without assigning personal blame.
  - c. Explore how well you managed the risks and engaged the stakeholders.
  - d. Write a review report; make observations, provide recommendations and describe next steps regarding follow-up issues and priorities. Circulate to all relevant stakeholders.

