

Monitoring a Health Service Integration Initiative

Description:

This tool provides information on how to effectively monitor a health service integration initiative currently underway.

How it can be used:

Monitoring and evaluation of progress will help you assess if your initiative is achieving its goals and strategies, improving health services and making best use of resources, providing effective reports and communications, meeting funding obligations, and determine if any adjustments are necessary.

Understanding how things are progressing is important to determine success, understand current challenges and recent opportunities, consider risks and quality, ensure accountability, provide feedback to participants, and fine-tune as required.

The health services integration coordinator and the health services integration initiative group can review these questions on a regular basis (quarterly at a minimum) to monitor progress. When a no response is provided for each question, then the question “Why not?” needs to be asked, and the reasons determined. Once a clear understanding on the “Why not?” is determined, the question, “What corrective action is required?” is asked. The who, what, etc. to support the action should be identified.

Documents

The Strategic Plan for the health service integration initiative led to the development of the Annual Action Plan. Groups and/or individuals then used information from the Annual Action Plan to develop their personalized Work Activity Plans.

A combination of the content from Work Activity Plans will provide the status of what is going on with each strategy and supportive actions by individuals and/or groups, along with who is involved, how things are going with timing, and whether or not the performance indicators have been achieved. If necessary, an overall executive summary can be prepared by the Health Services Integration Coordinator or the Health Director. This information can be used when preparing formal reports on the health services integration initiatives.

The Work Activity Plans can be laid out in a table with columns, or the applicable information can be listed in the following order.

Headers

Individual and/or Work Group Work Activity Plan – List the names

Date – Indicate the reporting date

Strategy – Indicates the applicable strategy

Columns

Actions – List the key actions and the following information for each action item:

- Responsibility – Who is the lead and who will be involved
- Start Date – Indicates the date agreed to at the implementation stage
- Finish Date – Indicates the date agreed to at the implementation stage
- Budget Impact – Indicates the budget for the action
- Performance Indicator – Lists the progress status towards the applicable indicators
- Comments – Provides information on the status for each action (e.g., completed, in-progress, delay in funding, etc.).

Provide this information to participants involved in the implementation of the initiative as well as to those who approved the plans, and other relevant stakeholders.

Key Monitoring Questions

The following questions can be asked by those responsible for the health service integration initiative implementation at the approval of the plan, or as stakeholders, as part of an accountability requirement.

Strategic

1. Have major changes (opportunities, threats) occurred in the external environment that would cause the strategies for the initiative to be abandoned or revised? If so, what are they, what strategies are affected, and what should be changed?
2. Have major changes (strengths, weaknesses) occurred in the organization that would cause the strategies for the initiative to be abandoned or revised? If so, what are they, what strategies are affected, and what should be changed?
3. Are all partners still ready, willing and able to continue with the initiative?

Implementation

1. Are the implementation plans still consistent with the current internal and external environment? If the answer is “no”, what major changes need to be considered? What corrective action is required?
2. Is the implementation of the strategy appropriate in view of available resources? If the answer is “no”, why? What corrective action is required?
3. Does the implementation have an appropriate time framework? If the answer is “no”, why? What corrective action is required?
4. Have we progressed satisfactorily toward achieving our stated strategies and performance indicators? If the answer is “no”, why? What corrective action is required?