

Brant County Health Unit's Performance Management System

Addendum to 2016-2026 Strategic Plan

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**BRANT COUNTY
HEALTH UNIT**

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Table of Contents

- Table of Contents iii
- List of Figures iv
- What is performance management? 1
- Why do performance management? 1
- What performance management is NOT 1
- Goal 2
- BCHU performance management system 2
 - 1. Planning and reviewing performance standards 3
 - 2. Developing and collecting performance measures 3
 - 3. Analyzing and reporting performance measures 3
 - 4. Quality improvement 4
- Benefits of a performance management system 5
- BCHU performance management plan 5
- BCHU strategic plan and performance management system 5
- References 6

List of Figures

Figure 1: Public Health Performance Management System	2
Figure 2: Health Quality Ontario QI framework and Model for Improvement.....	4

What is performance management?

Performance management is the ongoing process of setting performance standards, systematically measuring performance over time, and making improvements based on data.¹ It can help public health organizations to identify the following: which path is the right path; how to follow the path without getting off track; how to stay focused on where you want to go; and how to keep getting better.²

Why do performance management?

The Brant County Health Unit (BCHU) has been generating and collecting data to serve planning, accountability, evaluation, research and knowledge exchange purposes. Although the organization is engaged in program performance measurement (e.g. Ministry' Accountability Agreements, BCHU's Balanced Scorecard by program area, program monitoring & evaluation etc), these individual efforts have not been contained within an overall system of routine measuring, assessing and communicating progress on public health priorities, programs and services. What is also missing is an articulation of the quality improvement processes that would follow an assessment of progress, which may demonstrate not only successes in program and service delivery but also areas for improvement.

To address these gaps and to stay committed to building and fostering a culture of organizational excellence require a sound performance management system. Such a system would allow BCHU to utilize a systematic process for identifying standards of performance, measuring and reporting progress on programs and services, and informing opportunities for improvement. Ultimately, a performance management system will contribute to better outcomes for BCHU and improved health for Brant residents.

What performance management is NOT

Performance management, as discussed in this context, does not refer to the process of managing individual employees or the employee performance review process.² Performance management is also different from program evaluation in that the former occurs more frequently, is broader and less in-depth, attempts to provide scores on performance rather than reasons for observed performance, has its costs distributed across a number of programs and informs quality improvement rather than decisions about whether and how to continue operating a program.³ Performance management is also different from performance measurement. As described below, the latter is a subset of the work required to complete the former. Performance management is an overarching strategy while performance measurement represents the technical side of how to account for performance.

Goal

BCHU will utilize a performance management system (PMS) to further integrate and enhance processes, mechanisms and resources that measure and communicate progress on public health priorities, programs and services on an ongoing basis, and demonstrate areas for improvement and excellence in program delivery.

BCHU performance management system

BCHU will utilize the Performance Management for Public Health framework as its local PMS. The framework was created by the Turning Point Performance Management Collaborative in the 1990s. It comprises four parts or steps (see Figure 1 below)¹:

1. Identification and use of **performance standards**,
2. Identification and collection of **performance measures**,
3. An ongoing process and timeline for **reporting of progress**, and
4. Use of a **quality improvement process** to respond to identified needs.

Figure 1: Public Health Performance Management System

PUBLIC HEALTH PERFORMANCE MANAGEMENT SYSTEM



A PMS is the operationalization of the conceptual Performance Management Framework for Public Health and translates how the components/steps of the framework are put into practice by each program area. The PMS cycle follows four steps, which are described below.

1. Planning and reviewing performance standards

Performance standards are objective statements indicating an optimal output or outcome against which an organization's performance is to be assessed. Standards are developed to reflect the services and programs provided, as well as the daily operations of the organization or a particular program. BCHU will set performance standards using the 2018 Ontario Public Health Standards, associated protocols and guidelines as well as other relevant documents specifying programmatic, financial, good governance and legislative requirements. Where applicable, standards will focus on social determinants of health, health rankings, community engagement, and workforce development.

Performance Standards can be descriptive (qualitative) or numerical (quantitative) and identify the end state. Examples include:

- A system for food premise inventory shall be kept up to date (Descriptive)
- At least 75% of BCHU clients will rate services as "good" (Numerical)

2. Developing and collecting performance measures

This step involves defining measures, developing tools and data systems, and collecting data on a regular and ongoing basis. Performance measures are specific qualitative or quantitative representations of a capacity, process, or outcome deemed relevant to the assessment of a Performance Standard. Typically, performance measures include a date, direction of change (increase, decrease, maintain), and a population associated with it. They should demonstrate what actually happened compared to what was planned or intended, how much we did, how well we did it.

To select specific performance measures, BCHU will consult local, provincial or national tools or datasets containing tested measures, such as MOHLTC Accountability Agreement indicators, Profile electronic medical records system, Hedgehog database for inspections, iPHIS, Panorama, Canadian Community Health Survey and others.

Examples of Performance Measures include:

- % of clients who rate BCHU services as "good"
- % of tobacco vendors in compliance with youth access legislation at the time of last inspection
- % of pregnant women who report smoking at time of newborn's birth

3. Analyzing and reporting performance measures

At this stage, the performance data is analyzed and shared with internal (management, staff) and external stakeholders (MOHLTC, community agencies, general public). Reported results should help understand if we are on track for meeting standards and targets, and inform a plan for action.

BCHU will utilize the existing reporting tools, such as the Balance Score Card and summary reports, to communicate performance data to stakeholders. Program and

organization-wide dashboards will be explored and piloted in 2019. Data is to be shared via staff and management meetings, HUB, flow boards and other formats.

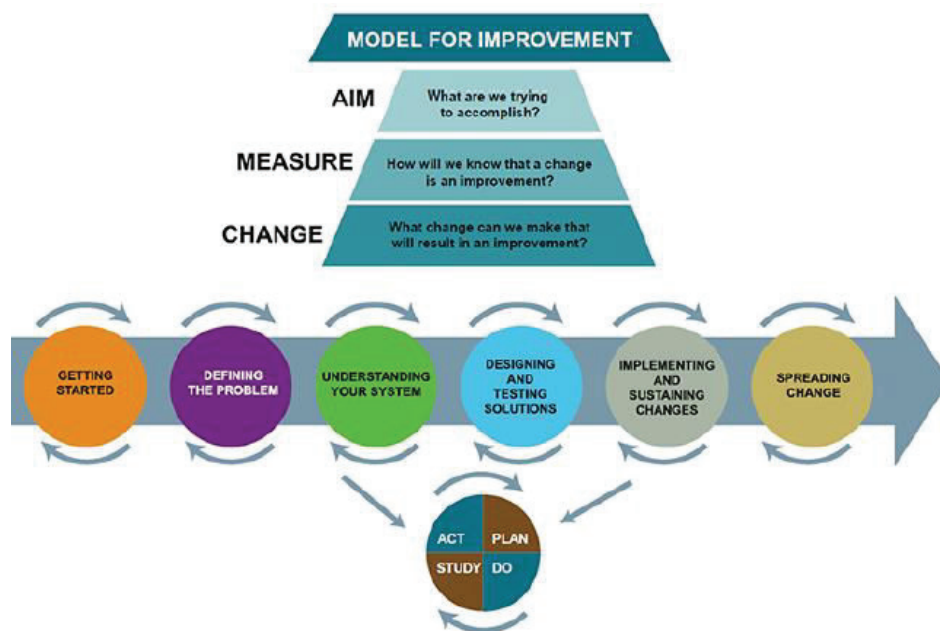
In most cases, data will be monitored and reported quarterly throughout the year. Year-end data will be gathered and the final year-end results will be reviewed by management and staff within the first quarter of the following year to determine if standards were met. Should review of reports and data reveal that a particular performance standard is not met, a Quality Improvement (QI) project can be considered.

4. Quality improvement

This is the final step in the cycle that involves managing change and achieving quality improvement in public health policies, programs, or infrastructure based on performance standards, measures, and reports. At this stage, the collected data is used to inform actions/projects to make changes in processes, address identified problems, and improve efficiency and effectiveness.

BCHU will adopt the Health Quality Ontario QI framework and model for improvement⁴ (see Figure 2) to develop and implement QI initiatives on an ongoing basis. This model identifies what the organization is trying to accomplish, how we will know if the change is an improvement and what changes the organization will implement to result in an improvement. The BCHU will use the Plan-Do-Study-Act (PDSA), Rapid Cycle Improvement or other QI tools to design, test and implement changes for improvement.

Figure 2: Health Quality Ontario QI framework and Model for Improvement



Benefits of a performance management system

There are a number of potential benefits of integrating a comprehensive PMS into daily operations of BCHU. As outlined by the Public Health Foundation, ways that performance management can positively influence a public health organization include¹:

- better return on dollars invested in health
- greater accountability for funding and increases in the public's trust
- reduced duplication of efforts
- better understanding of public health accomplishments and priorities among employees, partners, and the public
- increased sense of cooperation and teamwork
- increased emphasis on quality, rather than quantity
- improved problem-solving

BCHU performance management plan

All departments, program and services areas should have a PMS. There may be internal and external factors that make it necessary to develop or revise an existing PMS, such as:

- new or reorganized programs
- underperforming or unusually performing programs or activities
- new municipal or provincial initiatives
- changes in organizational priorities
- requirements by funders or external partners

BCHU's operational plan will incorporate a performance management plan to support establishing and maintaining a comprehensive PMS across the organization. The plan will include details about activities, resources and timelines to:

- Set or review performance standards, indicators, measures for each program area
- Measure and report on progress of performance standards to stakeholders
- Support continuous quality improvement efforts across the organization

BCHU strategic plan and performance management system

The BCHU's 2016-2026 Strategic Plan states the agency's mission, vision, strategic priorities and objectives to address them. A comprehensive PMS will help ensure the strategic priorities and objectives are met, as it will enable stakeholders (first of all, management and staff) to track the progress of action items outlined in the strategic plan and identify areas for improvement, if necessary. All performance indicators will be aligned with BCHU's Strategic Plan objectives and this alignment will be always reflected in the performance management plan and reporting tools.

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