

A Portfolio Management and Benefits approach to improving the Health and Wellbeing of people living in the Mid West of Ireland

‘A Step in the Right Direction for the Health and Wellbeing of the Mid West 2018’¹

Seamus Woods

Chief Projects Officer, Portfolio Management Office
Mid West Community Healthcare, Ireland

PMO Vision: Right projects the Right way by 2020

Introduction

Mid West Community Healthcare

Mid West Community Healthcare is one of nine Community Healthcare Organisations areas across Ireland and provides services to the people of Limerick, Clare and North Tipperary. Community Healthcare is the name we give to the range of health and social care services provided by the Health Service Executive outside of the acute hospital system. The Mid West Community Healthcare area has a population of 384,998 as per the 2016 Census. This is an increase of 5,671 which represents a growth of 1.52% on the 2011 Census.

A Portfolio Management Office (PMO) was set up in April 2017 to provide support to the Senior Management Team in building an effective change portfolio, aligned to the organisations strategic objectives and ensuring appropriate governance is in place to better authorise and manage the on-going initiatives.

A Portfolio Framework ‘Vision to Reality by 2020’ (See Appendix I) was developed and agreed at an early stage to oversee and manage the organisation’s Portfolio going forward and to provide assurance to the Chief Executive Officer that the Portfolio was balanced and being implemented in an appropriate fashion.

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As can be seen from the Portfolio Framework, the initial stage gate was to be underpinned by a clear strategic approach. The development of a Health and Wellbeing Strategy for the Mid West Community Healthcare Organisation provided an early opportunity to consider such an approach.

In meeting our PMO Vision of ‘Right Projects Right Way’, the challenge in developing a Health and Wellbeing Strategic Plan was to:

- Create a Portfolio of projects that the Mid West Community Healthcare Organisation believe would optimise the delivery of its vision for the health and wellbeing of the community,
- Select projects that were more likely to have maximum strategic contribution across all aspects of the strategy and organisation and not just service performance,
- Ensure a Portfolio review process to check progress against the strategy.

In many organisations, even when there is a clear organisation strategy, there is the practical complication of choosing both the right initiatives and choosing amongst competing initiatives in order to determine the right portfolio that will achieve the strategy itself. This dilemma is sometimes further complicated by ensuring not only the right initiatives are chosen but also that there is a balance of projects across the portfolio to ensure that the key stakeholder outcomes are delivered.

To meet these challenges and to progress passed Gate 1 of our PMO Portfolio Framework, two key portfolio approaches were applied:

- A Strategy Mapping Methodology (Kaplan and Norton),
- A Benefit Realisation Management Approach to inform outcomes/measures (Gerald Bradley).

The Approach to developing the Mid West Strategic Plan

The Health and Wellbeing approach, set out in the Healthy Ireland Framework 2013, is to enhance the capacity of people and communities to maximise their health and wellbeing. Given the multifaceted impact of wider social issues on health and wellbeing, health services alone cannot address the complex health related problems in society today, therefore the approach will require involvement and collaboration with other sectors, agencies and communities. The people of the Mid West will be better supported to improve their health and wellbeing by services working together, using a prevention model that focuses on partnership work and the use of local services to build the capacity of people living in the community and therefore improve

their health outcomes. To be truly effective, solutions are needed at a local level that are built upon the foundation of prevention and early intervention.

A Health and Wellbeing Steering Group, chaired by the Head of Health and Wellbeing for Mid West Community Healthcare Service, and supported by the Mid West Portfolio Management Office, provided the oversight in developing ‘**A Step in the Right Direction for the Health and Wellbeing of the Mid West**’, that will set the strategic and operational direction for health and wellbeing in the Mid West over the next 7 years. At the outset the Steering Group were of the view that there was a need to ensure that any critical objectives set out in the Strategic Plan would be translated into actionable behaviours and would build on the values of the Mid West Community Healthcare, as set out earlier in the document itself. In this context the Health and Wellbeing Steering Group agreed to use a Strategy Mapping Planning Framework to develop the plan. This ensured that there was:

- A common understanding of purpose and shared vision for Health and Wellbeing in the Mid West,
- A set of agreed strategic objectives that will deliver on the purpose and realise the Healthy Ireland vision,
- A set of outcomes and success measures developed for each objective that will help us to set out what improvements are required and a way of checking progress,
- A programme of initiatives that, when delivered, will translate the strategy into action,
- A monitoring and feedback system to ensure that progress, when tracked, will indicate whether or not there is a need to take corrective action.

In essence the approach ensured that:

- The selected key strategic objectives will support the vision that the Mid West have for health and wellbeing,
- Outline our service commitments and actions that will be taken forward to deliver the outcomes that are expected over the next 7 years,
- Have a way of checking progress on a regular basis.

The following diagram sets out this approach and is broadly based on the principles and approaches used in the Kaplan and Norton (find).



Key issues and challenges



Consultation and stakeholder engagement with key services and staff was seen as critical to inform and enrich the proposed actions within the Strategic Plan. Staff across the services embraced the opportunities to tell us what was important in supporting their health and wellbeing and that of our service users.

The Project Team consulted with staff through various consultative fora to provide assurance so that the Strategic Plan would be well informed by those who are at the front line and who are also working with communities. The knowledge gained from consulting with those who work across the Mid West Community Healthcare system has been vital in determining the nature and emphasis of our health and wellbeing approach and shaping future directions.

The consultative process will continue throughout the implementation phase. The objectives and targets set out in the document, while practical and balanced, are ambitious and challenging. The PMO will develop a monitoring/tracking process to provide regular assessment against plans and the effectiveness of our actions.

Following an analysis of the data received during the consultative process, the following key strategic issues were highlighted and a plan to address them was considered within the overall strategy mapping approach.

- *Better partnership with communities and service users*
- *Need better data/information to inform decision making*
- *Maximise use of social media*
- *Be seen as employer of choice from a Health and Wellbeing perspective*
- *Improved outcomes for socially excluded groups*
- *Build on existing collaboration amongst agencies in the Mid West to ensure joined up thinking*
- *More focus on self-management by service users*
- *Maximise the use of our staff as health ambassadors for Health and Wellbeing*

These issues/challenges were dealt with in a considered way in the development of the following Strategy Map.

Strategy Map, including key strategic objectives



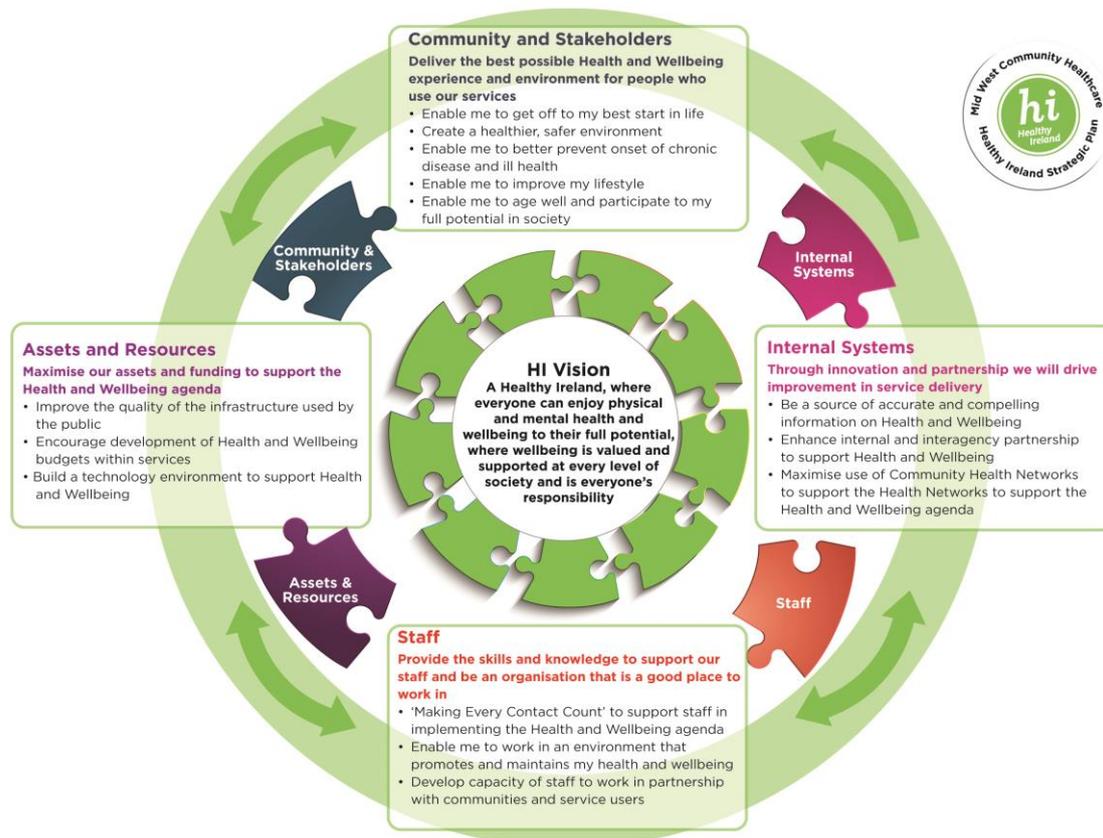
The Strategy Map highlights the strategic objectives that will deliver on the Healthy Ireland Vision and will address the strategic issues identified in the previous section. They are a comprehensive set of enabling factors which will support Health and Wellbeing and its funded partners to deliver on the intent of the vision. The strategic objectives are the building blocks for the Mid West's Strategic Plan to deliver on the vision and define the intent of the plan, with clear outcomes, measures of success and actions that can be taken forward. The objectives are

set out under the 4 organisational perspectives, as devised by Kaplan and Norton: Community and stakeholders, Internal systems, Staff and Assets and Resources.



This methodology focuses its efforts on helping organisations to develop a strategy across 4 perspectives, as outlined above and force an organisation to ensure it has a measurable balanced strategy to implement. The notion of balance is both critical from the strategic perspective as well as the Portfolio perspective. Any strategy and supporting Portfolio must address all 4 perspectives.

The following Strategy Map, developed, following the steps outlined in the aforementioned Framework, represent the Strategic intent for Health and Wellbeing reform across all 4 perspectives within the Mid West Community Healthcare Organisation.



Outcomes and measures for each Strategic Objective



Scorecard

In developing the appropriate outcomes and measures, we wanted to ensure that there was a clear cause and effect relationship with each strategic objective that is evidenced based and would facilitate an on-going assessment of how the Health and Wellbeing Strategic Plan is working and how successful it will have been over its 7 year horizon.

A Health and Wellbeing scorecard was used to bring the strategic objectives on the Strategy Map to ‘life’ and allow us to identify the targets to be achieved by 2025, including the ‘gap’ from where we are currently.

Objective	Outcome	Success Measures 2018	Success Measures 2025	Projects/ Initiation
Objectives <i>What are our key focus areas</i>	Outcome <i>What impact are we trying to achieve for each focus area</i>	Success Measures <i>How much do we plan to improve over the 7 year period?</i>		Initiatives <i>What action will we take to deliver the improvements sought?</i>

The following was considered in the completion of the above scorecards.

- For each objective a number of outcomes/benefits were selected that would clarify the impact that we are trying to achieve (see below for the approach taken in this regard),
- For each outcome/benefit, a ‘measures of success’ was selected that would help identify how much we wanted to improve over the next 7 years,

- For each measure a target indicator for 2018 (starting point) and 2025 (end point for plan) was identified,
- Initiatives that may be an appropriate response to closing the ‘gap’ between the 2018 and the 2025 indicator measures were suggested,
- The measures of success selected were checked to see if they were both necessary (without the measure would the objective still be met) and sufficient (if all the measures were achieved would the objectives still be met),
- For each such initiative the lead Mid West service and /or services were identified.

In developing the appropriate outcomes/benefits for each strategic objective, we wanted to ensure there is a clear cause and effect relationship between each objective and the impact it was intended to have.

A benefit realisation management approach to developing the scorecard was used as a way of clarifying and working through the outcomes/measures to be associated with each objective. To support the above we used a definition of ‘benefits’ as set out by Gerald Bradley (Bradley 2010)

- *‘a Benefit is an outcome of change that is perceived as positive by a stakeholder’*

Given that ‘outcomes’ is a language familiar to our professionals we decided to use that rather than trying to introduce something different. In selecting the appropriate measures the following *Logic Measures table* was developed to guide the Project Team.

The *Logic Measures table* sets out the approach taken to developing measures for each of the Strategy Map objectives/outcomes, with the ultimate measure of success being to achieve progress towards the Healthy Ireland Vision and associated Goals. The *Logic Measures table* is based on a number of principles:

- Measures should reflect the purpose and vision of Healthy Ireland,
- If initiatives are conducted well and are evidence based then the desired outcomes can be reasonably expected to occur, if the action is an appropriate response to the original need,
- Measurement means the magnitude of improvement associated with each objective, Start ‘with the end in mind’,
- It is service/business changes and behavioural changes that will deliver results,
- Measures, where possible, should use the hypothesis of the evidence based practices/services that have been sourced through research analysis.

The *Logic Measures table* sets out how the vision of Healthy Ireland and the strategic objectives of the Strategy map (themselves long term outcomes) can be expected to occur if we use measures associated with the intermediate/immediate outcomes.

Logic Measures table

Hierarchy of Outcomes	Definition	Example
Ultimate outcomes	Impact on overall problem and impact on overall policy goal i.e. Healthy Ireland Vision	A healthy Ireland where everyone can enjoy physical and mental health and wellbeing to their full potential
Long term outcomes	Significant impact on target population, evidence of embedded proactive and cultural changes i.e. objectives from Strategy Map	E.g. 'Enable me to have my best start in life'
Intermediate outcomes	<ul style="list-style-type: none"> Changes in individual practice, knowledge, attitude and skills Impact on systems and inter service/agency practice 	e.g. <ul style="list-style-type: none"> Use of evidence based self management approaches Change in attitude, behaviours and skill sets of staff Increase access to services and supports that are responsive and appropriate
Immediate outcomes	Initial indication of success e.g. levels and nature of participation in appropriate services, awareness of services on offer, reactions to services etc.	<ul style="list-style-type: none"> Increased awareness of and availability of services Increased participation in evidence based cessation programmes
Inputs	New and improved services, policies, processes etc.	Health and Wellbeing projects

The ultimate outcome i.e. Healthy Ireland vision is an aspiration given the many contributory factors, both internal and external to the CHO. The long term outcomes from the Strategy Map may not be totally demonstrable within the time span of the strategic plan, as also there are a range of other factors which can influence their achievement which are external to Mid-West Community Health Care.

The use of the *Logic Measures table* enables the measurement of progress towards the ultimate and long term outcomes through actions taken at the intermediate and immediate outcome levels and which are demonstrated through research in the Health and Wellbeing arena and in other evidence based work. Whilst changes in the immediate level would expect to happen within the 12/18 month range, changes in the intermediate level would take 2/4 years to manifest themselves.

In this way the Health and Wellbeing Strategy Map is a balanced picture of the result of our intended strategy and is expressed through a series of measures and associated initiatives that ensures each project has a conceptualisation to facilitate tying its work and deliverables to the

overall Health and Wellbeing Strategy. This approach provides a solid foundation for the measurement of the strategy at operational level across the 4 perspectives of the Strategy Map.

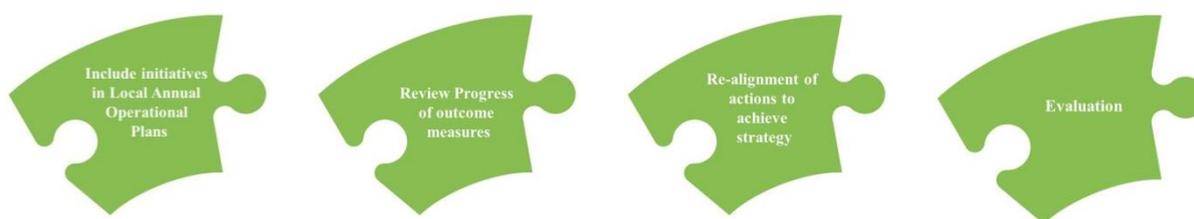
Example of scorecard

A scorecard was developed for each of the 14 Strategic Objectives from the Strategy Map and the following sets out an example of one such scorecard

Create a Healthier, Safer Environment

Outcome	Measures of Success 2018	Measures of Success 2025	Overall Initiatives	Responsible
All Community Health Care service users will receive health services in a tobacco free environment	Ensure compliance with the HSE Tobacco Free Campus Policy at 100% for Primary Care and Social Care facilities.		Develop action plan to progress implementation and on-going monitoring of Tobacco free Policies including identification of a Lead	Health and Wellbeing Services
	75% of Mental Health facilities go tobacco free by Q4 2018	100% HSE and HSE Funded Sites tobacco free	Commence qualitative survey to evaluate the impact on service users, staff and visitors of the HSE Tobacco Free Campus policy in Mental Health units	Mental Health
	Attain ENSH (Global Network for Tobacco Free Health Care Silver certificate for Mid West CHO	Mid West CHO to attain Gold certification for ENSH (Global Network of Tobacco Free Health care services quality standards)	Project to attain certification under Global Network of Tobacco Free Health care services quality standards.	Health and Wellbeing
All Community Health Care service users and staff will have healthier food choices	3 HSE Older Persons Residential Units to have healthy food plan options on site	Implement Healthy Food Plan options in 100% of HSE sites.	Mid West Healthy Food Provision Project <ul style="list-style-type: none"> Residential centres Day centres Section 38 and 39 (Including examination of contracts) 	Social Care catering Department and Health and Wellbeing
	Implement Healthier Vending policies in 25% of sites within the Mid West	Implement Healthier Vending policies in 100% of sites within the region	Healthy Vending Project	Health and Wellbeing
	Develop baseline for HSE and funded sites for calorie posting, with the aim of year on year increase.	Implement calorie posting 100% to all HSE sites, 100% of Funded Agencies.	Calorie Posting Project	Social Care catering

Implementation Journey



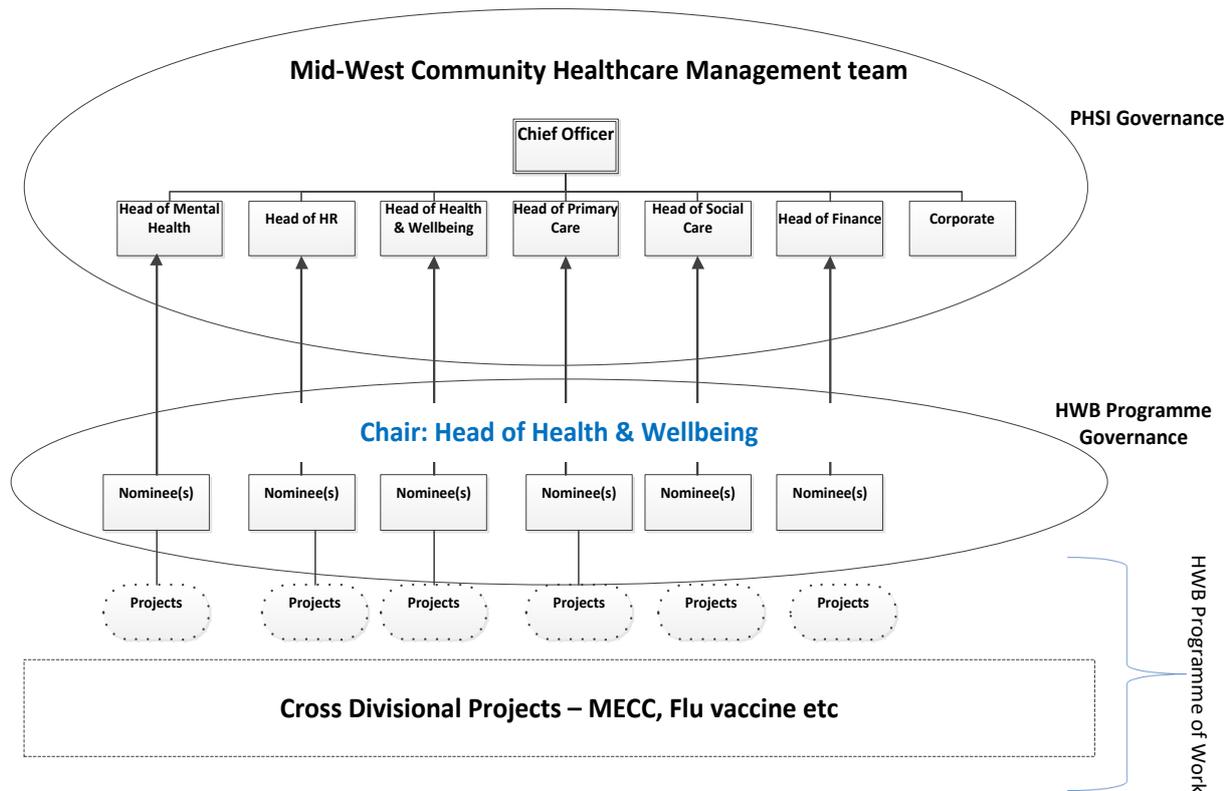
The previous section sets of the key initiatives and a supporting framework of success measures that will be used by the Health and Wellbeing Steering Group to facilitate oversight of the Health and Wellbeing Strategic Plan. Each of the initiatives listed will only produce positive change if effectively implemented, both collectively and individually by our care group services and partners. This will require discipline, planning and execution over the next 7 years.

This document has set out the commitment to change but much work is needed to develop, design and deliver on the initiatives outlined. In order to achieve the level of change required in a logical and pragmatic way, the Health and Wellbeing Steering Group will carry out an annual assessment of the status of the Strategic Plan, using the measures of success set out as an indicator and recommend to the Head of Health and Wellbeing the initiatives that should progress into the annual operation plan as set out in the figure below.



The Strategic Plan has been developed with the above challenges in mind and a robust portfolio/project management approach, will be maintained during the implementation phase.

The key actions identified for inclusion in the annual operation plan will in turn be mapped out using appropriate project management methodology and progress will be monitored ultimately through the Mid West Community Healthcare Management Team (see figure below) in line with agreed governance/tracking arrangements for its overall Change Programme and as set out in the Gateway Model developed by the PMO (See Appendix I).



A benefit mapping approach will also apply to key projects throughout the implementation phase and the benefits approach will build on the work undertaken to identify the key objectives and measures as outlined throughout this document. This can be seen in the figure below where the strategy map will align with the initial key elements of the benefits approach.

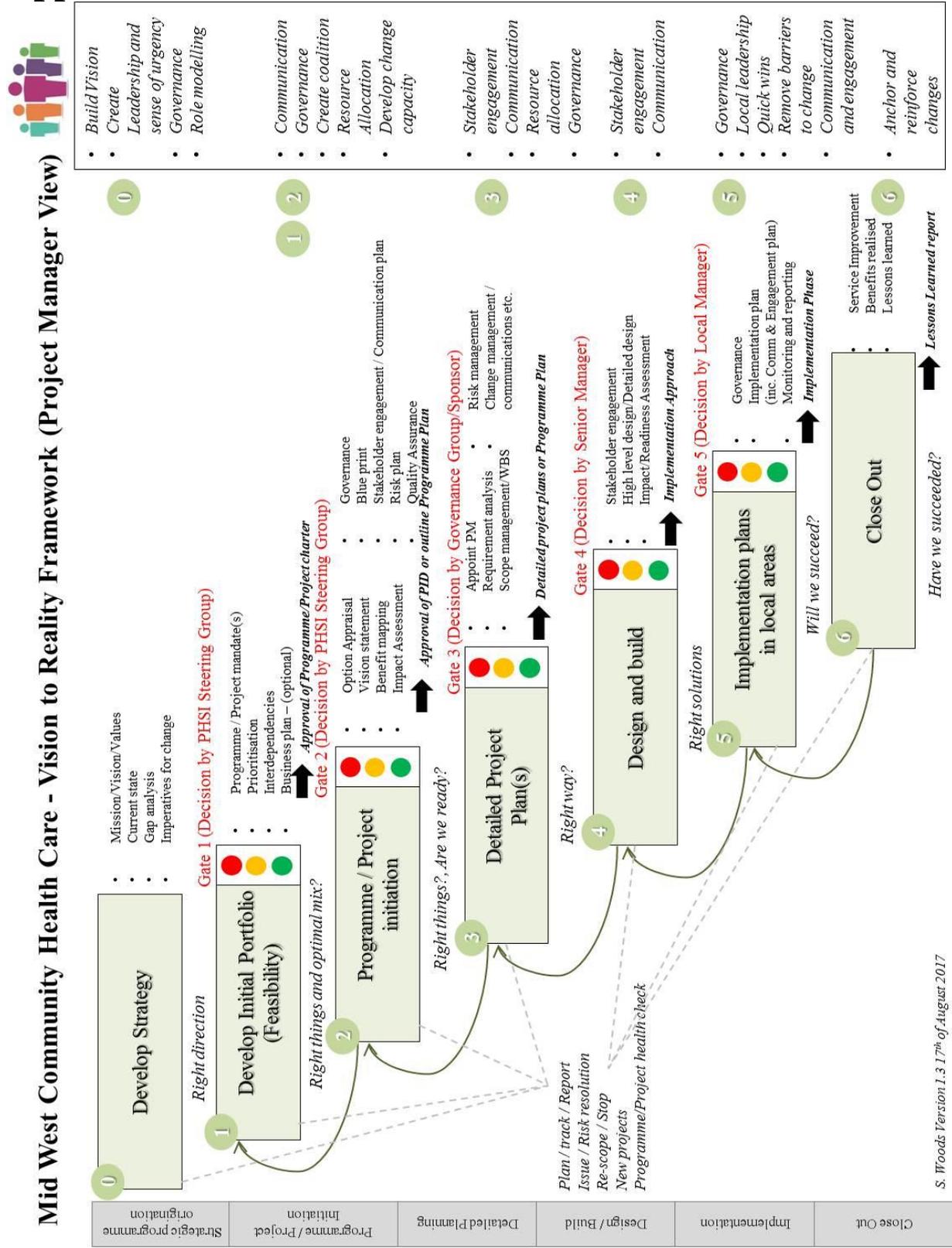
Benefit Maps and aligned Strategy Map



To learn more about health services in Ireland, visit <https://www.hse.ie/eng/>

To read the Mid West Health Strategic Plan, go to <https://www.hse.ie/eng/about/who/healthwellbeing/healthy-ireland/community-healthcare-organisations/mid-west-community-healthcare-hi-plan.pdf>

Appendix I



About the Author



Seamus Woods

Dublin, Ireland



Seamus Woods, IPMA-A, PMP is Chief Projects Officer, Portfolio Management Office, Mid West Community Healthcare, Ireland. He was previously an Assistant National Director (Senior Portfolio Manager) in the Irish Health Service Executive and a faculty member of the Irish Institute of Project Management. He has over 30 years of experience at Senior Management level within the Health Services and more than 25 years' experience of project management and change management as a practitioner, instructor and leader.

Working initially in the former Mid-Western Health Board he held senior roles at Board, Strategic and operational levels across a range of services. With the advent of the new health Service Executive in 2004 Seamus set up and led a national projects office for the community services sector. In 2010 he was seconded to Children services to programme manage the setting up of a new national Children's Agency (TUSLA) and its associated Reform programme. He returned to the Health Service Executive in 2013 as Head of Portfolio Management for the Health Reform Programme.

Seamus can be contacted at Seamusa.woods@hse.ie