Implementation Plan for a Performance Management System

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Developing and implementing a performance management system in any public health agency can seem like a daunting task. The implementation plan tool details the important aspects to consider during development and implementation. The plan is not meant to be an exhaustive list of activities, but a tool to assist and guide an organization through the stages of implementation.

The Implementation Plan Tool has the following sections to help develop and implement a Performance Management System in a health department:

- Create a PM & QI Council
- Council Activities
- Performance Measure Development for PM System
- PM System Reporting
- Review of Performance Management System
- Standard Operating Procedure
- Performance Management Communication Plan
- Customer Feedback Focus

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[1] Authors profiles are at the end of this article

Activity	Start Date	Target End Date	Responsible Party	Comments
Draft PM/QI Plan (separate checklist available in toolkit)				
Create PM & QI Council				
Council Activities				
− Establish list of confirmed team members				
− Develop SharePoint or Shared Folder access for team materials				
− Add all team members with edit access to shared site				
− Identify Team Leader and communicate to Council				
− Council members to review and acknowledge team charter (electronic acknowledgement on SharePoint site)				
− Draft meeting schedule for remainder of year, send to Council Members. Send invites.				
− Draft agenda for first meeting, send to Council members and load to shared folder				
− Conduct first Council meeting and review components of the phased performance management system implementation, obtain feedback				
− Make edits and finalize PM implementation plan (this document)				
Performance Measure Development for PM System				
− Meet individually with Branches/Divisions/Programs to draft				

meaningful measures to be used in PM System rollout				
– All Branches/Divisions/Programs to finalize measures (and reporting period for each) for submission to PM System				
– Determine draft performance measures for agency level reporting (if applicable)				
– Identify measures for Workforce Development Plan as part of phased roll-out				
– Each Branch/Office/Division to appoint PM System employee responsible for updating measures on a quarterly basis				
– Each Branch/Office/Division to submit final measures for PM System				
– First PM System reporting of measures to be loaded to SharePoint or Shared Folder by each Branch/Office/Division				
PM System Reporting				
Determine standardized reporting format for PM System				
– Council to review draft Excel format for use, feedback and suggest edits				
– Designate individual responsible for technical support related to reporting				
– Designate individual to own reporting format and be responsible for completing suggested edits moving forward				
– Designate "PM System Manager" that will ensure all Branches/Divisions/Programs/Offices have submitted finalized measures for PM System				

phased rollout – and will ensure quarterly uploads are complete				
− Finalize reporting template for PM System reporting				
− Distribute final reporting template to designated PM System employee throughout HD				
− Designated PM System employees by Branch/Office/Division/Program to fill out reporting template with finalized measures, targets, and reporting frequency				
− Designated PM System employees to share final reporting template to PM System Manager				
− PM System Manager to ensure all final measure submissions are loaded to shared site				
− PM System Manager to ensure reporting of measures loaded to shared site by each participating Branch/Office/Division/Program				
− Council to review reporting process and determine if revised method for reporting is needed				
Review of Performance Management System				
− Council to determine criteria for evaluating performance measures				
− Council to review reporting of measures and identify opportunities for improvement with reporting process				
− Council to define process for reviewing measures at a high level to ensure they are identifying improvement opportunities as needed				

– Directors to review measures against established targets to identify improvement opportunities				
– Leadership Team to include PM System review as a standing agenda item – focus on one Branch/Office/Division/Program review each month				
– Council to develop process for Branches/Divisions/Programs to annually review measures for reliability and meaningfulness				
Standard Operating Procedure				
– Council to finalize PM System process after phased rollout for standard operating procedure				
– Draft standard operating procedure (SOP) for performance management and reporting				
– Finalization of SOP and implementation throughout HD prior to full PM System rollout (non-phased implementation)				
Performance Management Communication Plan				
– Council to determine communication plan to share PM System phased rollout and launch with HD				
– Communication plan drafted				
– Provide regular updates to staff highlighting PM related efforts				
Customer Feedback Focus				
– Designate individual within HD to lead Customer Focus efforts (PHAB requires HD to demonstrate a regular cycle of collecting and using customer feedback data to make improvements) – "Customer Focus Lead"				

− Customer Focus Lead to work with all programs to ensure that customer base has been identified (internal & external)				
− Customer Focus Lead to identify best practice for collecting and using customer feedback to improve processes				
− Provide training to Leadership (and employees as applicable) on Customer Satisfaction and the relationship with programmatic goals and performance management				
− Customer Focus Lead to create standardized process for collecting customer feedback among customer facing programs				
− Customer Focus Lead to implement customer satisfaction surveys among Branches/Divisions/Programs as applicable				
− Customer Focus Lead to ensure HD is consistently collecting customer satisfaction data				
− Customer Focus Lead will meet with Branches/Divisions/Programs collecting customer satisfaction data to evaluate feedback				
− Collaborate with Council to review feedback and identify QI efforts and projects				

Authors profiles:

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