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GUIDE: Developing a Population Health Project Plan

CHECKUP

Queensland Government

Developed by the Health and Community Services Workforce Council in partnership with CheckUp Australia through the Queensland Government's Strategic Investment Fund initiative.

Contents

Purpose of Resource

The purpose of this resource is to provide learners with step-by-step guidelines and information to support comprehensive planning, development and implementation of population health initiatives and programs.

Trainers may choose to provide this resource as additional supplementary information to support learners understanding and completion of relevant assessments.

Units of Competency

This resource supports learning and completion of assessments for the following units of competency:

- HLTPOP501C Apply a population health framework
- HLTPOP503C Plan a population health project
- HLTPOP504C Evaluate a population health project

Acknowledgement

This resource has been adapted from a range of existing resources of which have been referenced at the end of this guide.

Developing Goals and Objectives

Developing goals and objectives is the first step to developing any project plan. This process often causes angst among people who do health promotion work as it can seem confusing and difficult to develop succinct and straightforward goals and objectives. However without succinct goals and objectives, we are unable to define what we are planning to do.

What is a Goal?

A Goal is the broad or long term change the project is working towards. It is a statement of what you ultimately want to achieve or your destination. When considering health and wellbeing, goals might relate to improving health and wellbeing status through changes in mortality and morbidity, disability, quality of life and equity. Achievement of goal(s) can only be expected once a number of objectives have been met.

Sample goal:
“Employees will have access to healthier food options within the workplace”

What are Objectives?

Objectives on the other hand are statements about more specific and immediate changes you want in order to progress toward your overall goal. As objectives are a statement about change, it often includes words such as: to increase, to improve, to reduce. The changes might be in skill levels, attitudes, knowledge, processes, awareness or behaviour.

Sample objective:
“All vending machines within the workplace will be modified to include at least 50% healthy food options by 1 September 2013. Healthy food options include wholegrain breads and cereals, fruits, vegetables, low fat dairy, lean meats, water and low kilojoule drinks.”

The **SMART** acronym can help us to write realistic objectives:

- Specific - indicates a clear action on a determinant, population group and setting.
    - Example: “to stop teens from smoking” is too general. Instead try, “At least 90 per cent of schools in the community will institute campus wide no-smoking policies by 2015”.
- Measurable - includes feature that will help you tell whether it has succeeded.
    - Example: “To ensure hospital staff eat more fruit” cannot be clearly measured. Instead try, “To increase fruit and vegetable consumption among workers in the Hospital (the target audience) by 50 per cent by June 2013”.
- Achievable - can be realistically achieved on time and within available resources.
    - Example: “To stop youth from drinking alcohol” is not realistically achievable. Instead try, “To reduce alcohol consumption by youth ages 14-16 in Queensland by 5 per cent by 31 December 2013”.
- Relevant - to the health issue, the population group and your organisation.
    - Example: “To improve physical activity levels among people with low literacy by teaching adults to read better” does not directly address the health issue. Instead try, “Developing pictorial instructions that can be understood at low

reading levels to improve physical activity among people with low literacy by 10 per cent in the next six months".

- Time framed – it has a timeframe for action.
  - Example, "To reduce the proportion of adults in Australia who smoke to 12 per cent" does not have a timeframe. Instead try, "To reduce the proportion of adults in Australia who smoke to 12 per cent by 2015.

What are Strategies/Actions?
Strategies are the steps you will need to take to implement the objective. Some plans will require you to break down these strategies further into 'actions' or the tasks that you will need to undertake against each of the strategies.

Below is a very simple project example summarising a goal, objectives and strategies:

Project Goal: To Plant a Vegetable Garden

Objective 1: To research the conditions needed to grow carrots, broccoli and cabbage, in two weeks time

Strategies:

- Test soil
- Research weather conditions
- Research need for these vegies
- Research their water usage/sustainability
- Investigate whether thieves, possums, birds etc will be a problem

Objective 2: Plant vegetables in four weeks time

Strategies:

- Make sure of equipment
- Make sure of family dedication to helping
- Buy seeds/plants
- Prepare the soil
- Set aside time to work in the garden
- Plant

Objective 3: Harvest and sell vegetables in three months time

Strategies:

- Water vegies
- Weed garden
- Protect from possums, birds and thieves
- Pick vegies
- Take vegies to the market

Source: Developing Goals and Objectives Fact Sheet, A Guide to Health Promotion Action, Women's Health West, Victoria,

Developing a Project Timeline

Once project goals, objectives and activities are identified, the next step is to develop a project timeline. This should list all the key activities that need to be done for each objective including who will do them and the date you expect each activity to start and finish.

Allow plenty of time to get all the activities done. It's a good idea to allow some extra time in case things don't quite go to plan or need to be rescheduled due to factors beyond your control. It is useful, particularly if you are planning an event, to work backwards from the event date to work out when you need to have each activity completed by.

To help keep track of the project activities and timeframes, it is best to list activities in your project plan in order from the start date of each activity. Include enough detail in the timeline to be able to guide the project team through the project from start to finish and keep the team on track.

A very basic timeline template is provided below:

Project Goal:			
Objective 1:			
Activity	**Responsibility**	**Start date**	**End date**
Objective 2:			
Activity	**Responsibility**	**Start date**	**End date**

Project Scheduling Tool – Gantt Charts

The Gantt Chart is a horizontal bar chart. It shows the project activities and tasks in sequential order with the bars representing the time estimated to complete them. The chart graphically represents the time relationship of activities, tasks, milestones and resources in a project. It is a flexible document and is regularly updated through the life of the project.

It usually includes:

- The major activities and tasks of the project.
- The project milestones.
- The interdependencies between phases/activities/tasks.
- A unique identifier for each phase/activity/task.
- A timeline.
- The person or resource responsible for each item.

The Gantt Chart is generally created at the start of a project and used as a baseline for reporting. The chart can be regularly updated to realign future work or add new work to the project scope with the remaining timeframe.

A Gantt Chart is developed to:

- Assist in determining how long activities will take.
- Assist in determining the relationship between activities.
- Identify the critical path – that is the shortest possible path from the first activity to the last.
- Use as a baseline for reporting.
- Assist with delegation and managing of team workloads.
- Assist in determining how long the project will take.
- Assist with identification and management of project risks.
- Confirm a common understanding of the project timeline among the project team.

A completed Gantt Chart that can be used for day-to-day management, planning and reporting. It is also a useful tool for management and project sponsors to clarify planning estimates, work required and timelines.

Gantt Charts can be created manually, through the use of a spreadsheet (e.g. Microsoft Excel) or a project scheduling software package (e.g. Microsoft Project).

Over the page is an example of a manually created Gantt Chart using Microsoft Excel. This sample and a template Gantt Chart is also available through this package of supporting resources.

It's better to overestimate a project timeframe than to underestimate one.

	Item Name	Resource Name	Timeline 2013								
			January	February	March	April	May	June	July	August	September
1	Needs Assessment	Project Officer									
1.1	Develop brief survey	Project Officer									
1.2	Identify survey respondents and contact details	Administration officer									
1.3	Send survey to respondents and allow completion	Project Officer									
◆	**Milestone: Survey Completed by Respondents**			◆ 15-2-13							
1.4	Collate survey responses	Project Officer									
◆	**Milestone: Needs Assessment Completed**				◆ 28-2-13						
2	Develop Educational Resource Ready for Public Consultation	Project Officer									
2.1	Identify educational resource gaps from needs assessment	Project Officer									
◆	**Milestone: Educational Resource for Development Identified**				◆ 11-3-13						
2.2	Research existing resources that can be adapted	Project Officer									
2.3	Research resource content	Project Officer									
2.4	Develop draft resource	Project Officer									
◆	**Milestone: Draft Resource Developed**					◆ 5-4-13					
2.5	Seek feedback on draft resource from internal staff and management	Project Officer									
2.6	Collate feedback and revise resource accordingly	Project Officer									
◆	**Milestone: Resource Developed and Ready for Public Consultation**						◆ 30-4-13				
3	Undertake Public Consultation (Focus Groups)	Marketing Consultant									
3.1	Develop questions for consultation process	Project Officer									
3.2	Indentify and recruit focus group participants	Marketing Consultant									
◆	**Milestone: Focus Group Participants Recruited**						◆ 17-5-13				
3.3	Undertake Focus Groups	Marketing Consultant									
◆	**Milestone: Focus Groups Conducted**							◆ 7-6-13			
3.4	Develop focus group report and key recommendations	Marketing Consultant									
◆	**Milestone: Focus Group Report Completed and Reccomendations Provided**							◆ 21-6-13			
4	Develop Final Resource	Project Officer									
4.1	Revise resource based on feedback from focus groups to produce final resource	Project Officer									
◆	**Milestone: Final Resource Developed**								◆ 12-7-13		
5	Print Final Resource	Preferred Printer									
5.1	Obtain quote from preferred printing supplier	Preferred Printer									
5.2	Send final version of resource to printer	Project Officer									
5.3	Print resource and post to lead organisation	Preferred Printer									
◆	**Milestone: Final Resource Printed and Ready for Dissemination**									◆ 31-7-13	

Before you start to develop a Gantt Chart you will need the following:

- An agreed Project Business Plan or Project Proposal or Brief.
- Knowledge and understanding of the project.
- Knowledge and understanding of the major activities in the project.

There are four key steps to developing a simple manual Gantt Chart:

1. **List the Project Outputs and Activities**
2. **Identify Resources**
3. **Estimate Timeframes**
4. **Identify Milestones**

1. List the Project Outputs and Activities

- The project outputs should be listed in the left hand column in separate cells.
- Insert new rows under each project output and list all the activities that need to be done in order to produce the output.

2. Identify Resources

- Next to each project output and activity, list the team member(s) or resource that will be responsible for delivery.
- Resources could include internal staff, contractors, consultants, equipment etc.

3. Estimate Timeframes

- Use the remaining columns to create a timeline for the project. In the example provided on page 7, each small column represents a week.
- Estimate the timeframe required for each activity first.
- Using the timeline, colour-fill in the cells in each activity row from estimated start date to estimated completion date for the activity. Remember to take into account staff member workload and committed work hours (e.g. a 2 day task would be completed in 4 days by an officer working at 50%).
- Then, fill in the cells in each output row starting at the earliest start date of the associated activities, and finishing at the latest completion date. This shows that the output will be completed when all associated activities have been completed.

4. Identify Milestones

- Milestones are significant events that act as progress markers for a project.
- It is valuable to include milestones so significant achievements can be monitored and reported.
- Milestones are usually linked to the completion of a key project activity or key task.
- The completion of a project output is always a milestone.
- Milestones can also be linked to funding or payments.
- Show milestones on the chart by adding a marker on the timeline such as a black diamond and the finish date (e.g. ◆ 12-3-13) and add the description of the milestone in the activity column list.
- Milestones are described in the past tense, for example ‘team assembled’, ‘resource developed’ and ‘resource printed’.

Developing a Project Budget

One of the challenges in project management is developing and managing a budget. Without a budget, it is easy to get off track and spend more than you planned or have available.

The first step is to identify and seek assistance from individuals within the organisation who have experience in developing a project budget.

The next step is to determine how much your project is likely to cost. It is worth using a budget from a similar project as a guide.

To work out a realistic budget, costs must be estimated as accurately as possible. This can be done by:

- Getting quotes for products and services
    - Try to get two or three quotes to compare prices.
    - Factor the highest quote into your budget.
    - Check how long the quote is valid for and ask about any likely increases in costs.
    - Get your quote in writing and ensure it details exactly what you want.
- Looking at similar projects you have planned.
- Asking appropriate people such as a finance officer or a colleague who does similar types of projects for advice in deriving costs.

Once the total cost of your project is known, you need to work out how much money you can access. This is also where you might look at other sources of income or support such as grants, sponsorships, cash contributions from your organisation and any in-kind support (for example goods or services that are donated including venue hire, free equipment, in-kind staff time). Drawing on existing partnerships is important to identifying what in-kind support they can offer.

Example Budget Template

Below is a sample budget template that can be used to develop a project budget. The categories and budget line items are only an example and these can be altered, added to or deleted as required.

Administration	**$**	**Inkind $**	**Notes**
Advertising			
Stationery			
Postage			
Phone			
Printing			
Travel			
Software			
Equipment			
Total			

Staff Expenses	**$**	**Inkind $**	**Notes**
Staff Salaries			
Conference Attendance			
Travel			
Staff Development			
Other			
Total			

Resource Development	**$**	**Inkind $**	**Notes**
Marketing Consultancy Fee			
Printing			
Postage and Dissemination			
Other			
Total			

Training	$	Inkind $	Notes
Venue Catering Stationary Presenter fees Other			
Total			

Evaluation	$	Inkind $	Notes
Consultancy Fees Evaluation Report Development Consumer Representation Other			
Total			

Source: Planning and Evaluation Wizard, Flinders University, South Australia Community Health Research Unit, http://www.flinders.edu.au/medicine/sites/sachru/tools/pew.cfm, Accessed: May 2013.

Project Evaluation

What is evaluation?

Evaluation is the process of assessing whether your project has met its objectives. Evaluation involves observing, documenting and measuring.

It is important to evaluate your project to:

- Assess how your project is going.
- Determine whether objectives and strategies are being met.
- See whether the project is making a difference.
- Identify areas to improve by assessing what worked well and what didn't.
- Support advocacy for the continuation or extension of the project.
- Be accountable to funders and community members involved.
- Provide a tool for other people to learn from when developing their own projects.

Evaluation should be built into your project during the planning phase. When it comes to developing your evaluation plan, you will first need to look at your **activities (process evaluation)** and the **effect (process/outcome evaluation)** these activities have had.

Process Evaluation

Process evaluation involves reviewing the activities (or strategies) of your project such as looking at what has been done, who has been reached, and the quality of the activities.

Process evaluation seeks answers to questions such as:

- Has the project reached the appropriate people?
- Are all the projects activities going to plan? If not, why not?
- Were any changes made to the intended activities? If so, why?
- Are materials, information, presentations of good quality?
- Are the participants and other key people satisfied?

Impact/Outcome Evaluation

Impact/Outcome evaluation involves assessing the extent to which your project has met its goal and objectives. Impact evaluation measures how well the objectives were achieved and outcome evaluation measures how well the goal has been achieved.

Impact/Outcome Evaluation seeks answers to questions such as:

- What progress has been made toward achieving the goal?
- To what extent has the project met its objectives?
- How effective has the project been at producing changes?
- Are there any factors outside of the project that have contributed to (or prevented) the desired change?
- Has the project resulted in any unintended change/s?

Collecting Data

The first step in **evaluation** is to gather data and record what has happened. Depending on your project, you might:

- Record the number of people who attend the event or activity.
- Record the number of people who turn up for health checks.
- Prepare a short survey or questionnaire to get people's feedback on the activity (perhaps measuring people's awareness of the factors contributing to chronic disease and whether they felt they had enough information to make healthy lifestyle choices).
- Organise a community meeting to discuss the project or activity after it has taken place.

Overall, there are two main types of data that can be collected as part of the evaluation process — quantitative and qualitative.

Quantitative

Quantitative evaluation is based on numbers and things that can be measured. It usually requires a base measure to start from. For example the number of people who attend an event or the number of people who change their behaviour. For example, if your objective was to halve the number of people who smoked in the workplace by the end of the project, you would need to know how many people smoked in the workplace at the beginning of the project.

Qualitative

Qualitative evaluation is more about how well an activity was delivered and received. It relies on people expressing their thoughts and opinion, how people engaged with the project, how they felt about doing the activity and what they think could have been done better.

There are many different ways in which you can collect/gather data and information for your evaluation. Some examples are as follows:

- Analysis of records – attendance, admission, demographic details.
- Surveys – email, mail.
- Individual interviews – face to face, telephone.
- Group interviews – focus groups.
- Documentation – journal, log, reports.
- Triangulation – combination of the above.

Developing an Evaluation Plan

An evaluation plan is a summary of what needs to be evaluated, what data needs to be collected, and how you are intending to collect this information. In some cases evaluation plans can be a requirement from funders.

The table below demonstrates how an evaluation plan requires clearly defined goals, objectives and strategies as they act as the foundation for the evaluation.

	Measure	**Type of Evaluation**
Goal	Long term outcomes e.g. health gain or improvement	Outcome Evaluation
Objectives	Medium term impact e.g. behaviour change	Impact Evaluation
Strategies	Short term results e.g. completed actions/outputs	Process Evaluation

In addition to having clearly defined goals, objectives and strategies, you will also need to consider the following:

- How will the evaluation be used?
- Who is the evaluation for?
- What evaluation questions should be addressed?
- What resources (e.g. funding) and time do you have for the evaluation?

Identifying key questions that will be answered by the evaluation is a key step in the evaluation process. The intended use of evaluation results often dictates the type of key evaluation questions selected. Examples of some evaluation questions to consider in the development of your evaluation plan are provided below:

- What seems to be working?
- What needs to be changed?
- How do we know that we've been successful?
- What have we accomplished?
- Are we making a difference?
- What's the evidence that things are working?
- How should we do it differently next time?

Developing Evaluation Indicators

Developing an evaluation plan involves identifying a range of indicators that will measure the success of your goals, objectives and strategies. Indicators are measures of progress and change that result from your project. They provide guidance about what type of information needs to be collected to measure success.

Some indicators will involve collecting data along the way to measure how things are going and enable you to make improvements if required. Others will require you to collect data at the end of the project.

Indicators are usually expressed in numbers. For example:

- Number of resources disseminated.
- Number of participants in the program.
- The proportion of 20 to 30 year olds.
- % of participants highly satisfied with the program.
- % of participants who have reduced their overall body weight by 10% or more.
- % of people who have stopped smoking.
- Number of phone enquiries.

Indicators can also be expressed without numbers. For example:

- Training materials produced.
- Documents, policies or other resources developed.
- Contract signed.
- Networks established.

There are two main types of indicators - 'process' and 'impact/outcome'.

Process Indicators

Process indicators measure how well your activities/strategies are going and often fall into 3 main groups:

Implementation **–** What has been done?

- Resources developed.
- Workshops undertaken.
- Policies developed.
- Media coverage received.

Reach and Scope – Who and how many have been involved or accessed resources?

- Number and types of resources developed.
- Number of resources disseminated.
- Number of workshops undertaken.
- Number of participants at workshops.
- Proportion of ethnic groups, age groups etc.

Quality **–** How well things have been done

- % of participants satisfied with resources developed.
- % of participants satisfied with workshop content and delivery.

Impact and Outcome Indicators

Impact and outcome indicators measure how well you achieved the changes that your project was aiming for. Therefore how well your project achieved its objectives and long term goals. Impact indicators related to your objectives and outcome indicators relate to your goal.

Impact indicators are much easier to determine as they relate to more immediate changes, for example, the percentage of people who have quit smoking. Measuring health outcomes are more difficult as it often relates to a much longer term goal such as reducing the incidence of smoking related disease.

For this reason, measuring health outcomes generally occurs in very large scale, long term projects with significant funding and often undertaken by large organisations.

Smaller projects often focus only on evaluating the impact of their objectives.

Examples of impact and outcome indicators:

- Changes in awareness, knowledge, skills.
- Increases in the number of people reached.
- Policy changes.
- Changes in behaviour.
- Changes in community capacity…
- Changes in organisational capacity (skills, structures, resources)
- Increases in service usage
- Improved continuity of care.

Evaluation Planning Template

Below is a sample evaluation plan that could be easily adapted for other programs/projects.

Objectives	Strategies	Process Indicators	Data Collection Methods	Impact/Outcome Indicators	Data Collection Methods
To increase knowledge among the target group about the risks of smoking during pregnancy and quit smoking support.	Disseminate quit smoking resources and information to expectant mothers through local antenatal clinics.	Number and type of resources disseminated. Number of antenatal clinics reached with resource dissemination.	Resource count. Number of clinics engaged count.	Level of increased awareness of the risks of smoking during pregnancy.	Survey of expectant mothers who attended antenatal clinics.
	Conduct short workshops on healthy lifestyle during pregnancy in conjunction with local antenatal clinics.	Number of workshops conducted. Number of participants in each workshop.	Workshop count. Attendance list count.		
To increase local business and retailers involvement in raising awareness of the risks of	Encourage relevant businesses and retailers (e.g. baby stores) to provide quit smoking	Number of businesses and retailers engaged.	Businesses and retailers engaged count.	Increase community involvement in raising awareness of the risks of smoking during	Survey of employees engaged in project: • Satisfaction of project implementation

smoking during pregnancy.	advice to clients (expecting mums)			pregnancy.	overall. • Satisfaction of training conducted. • Level of increased understanding of the risks of smoking during pregnancy.
	Undertake brief training sessions for staff of local businesses and retailers.	Number of training sessions conducted. Number of staff who participated in the training.	Training sessions conducted count. Attendance list count.		
	Disseminate resources to businesses and retailers to provide to clients in conjunction with quit smoking advice.	Number of resources handed out to clients.	Count - Number of resources disseminated to business/retailer minus the number of resources left over at the end of the project.		

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