



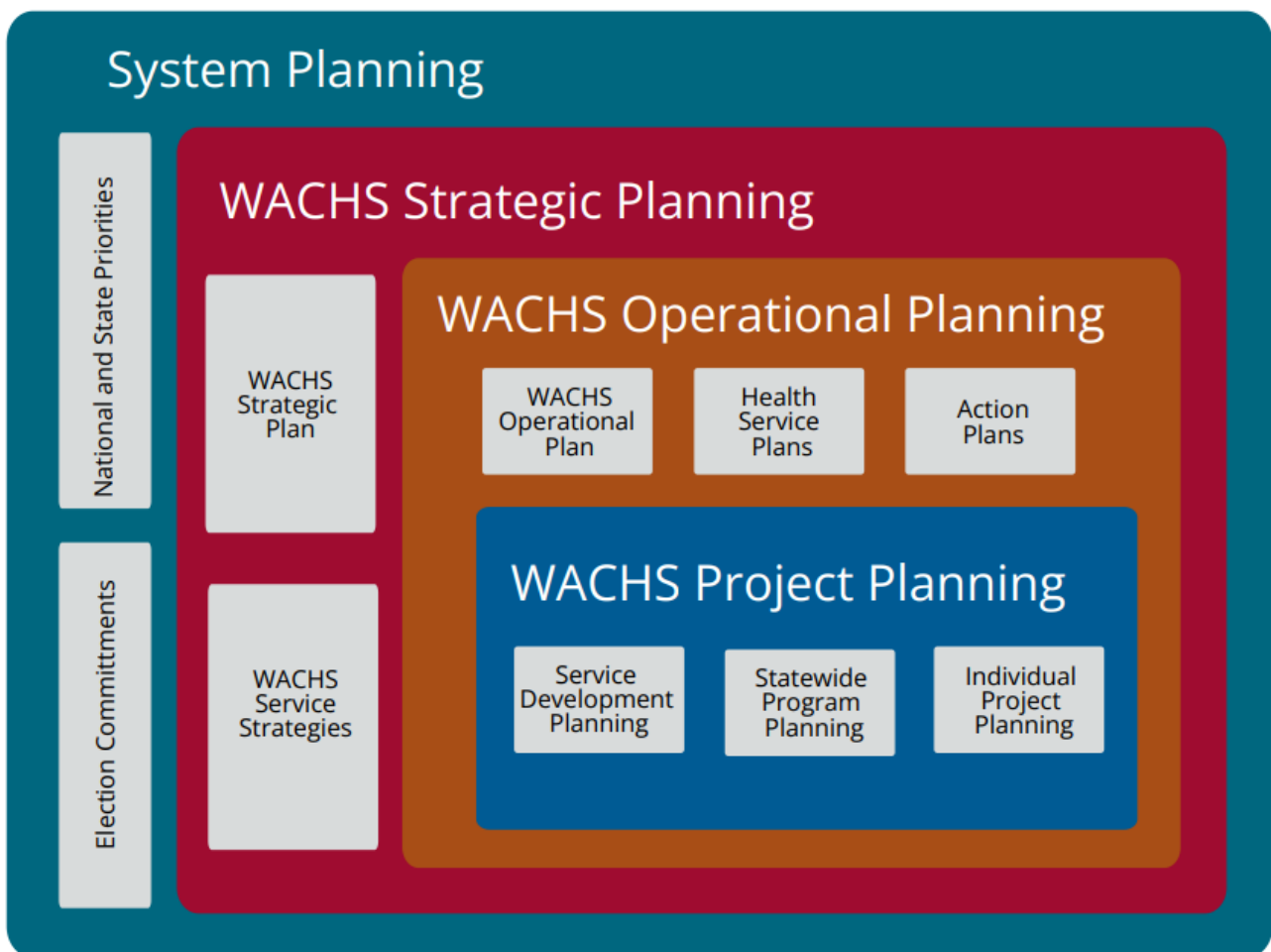
Planning, Service Development and Evaluation Policy

1. Purpose

This policy ensures that planning and evaluation of strategic and service development activities align with WA Country Health Service (WACHS), WA Health and broader government priorities and are approached in accordance with the principles of this policy.

The focus of all levels of planning and evaluation is to improve access to culturally responsive, patient-centred integrated care, and improve the patient/carer health journey, experience, and outcomes. This policy recognises the WA Sustainable Health Review 2019 (SHR) and the WA Clinical Services Framework (CSF) as key overarching health service planning documents. It identifies that planning is complex, multi-dimensional and dynamic and takes place within a broader landscape ([Figure 1](#)).

Figure 1: The WACHS Planning and Funding Landscape

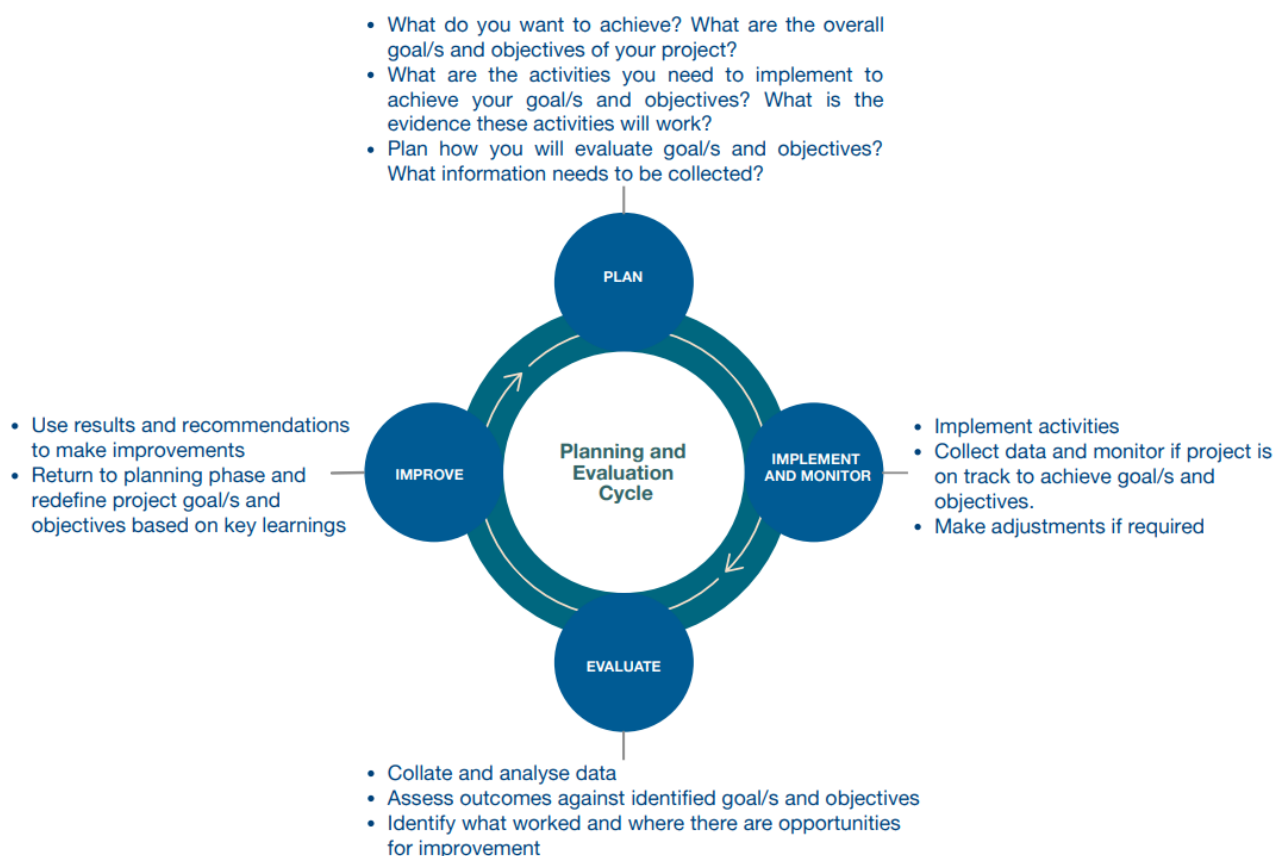


Planning and evaluation within WACHS are to address and reflect the WACHS strategic priorities:

- Delivering focussed and accessible services for those who need it most.
- Supporting country people to be as healthy as they can be and continuing to play our part in the economic and social viability of country communities.
- Supporting staff to deliver great care, empowering them to learn, grow, innovate and lead.
- Partnering to deliver more integrated services that improve patient outcomes and experience, giving consumers more choice and control.
- Aligning services locally to provide safe, patient-centred care, ensuring the needs of our patients are at the core of everything we do.
- Embracing innovation and technology to create a more connected and equitable health system.
- Ensuring that the services we provide are sustainable and we are transparent about our performance.

Planning and evaluation require the identification of clear goals, objectives and evidence-informed activities that when implemented will lead to realisation of intended outcomes and inform future service directions. This informs part of a continuous quality improvement cycle ([Figure 2](#)).

Figure 2. Planning and Evaluation Cycle



2. Policy

This policy outlines an agreed set of planning and evaluation principles, processes and supporting documentation to enable project staff, clinicians, managers and health planners to utilise consistent approaches to health service planning and evaluation at strategic, operational and project level. The different levels of planning, with their outputs and governance, are defined in [Table 1](#).

WACHS planning and evaluation principles include:

- WACHS' strategic vision, mission, directions, values and priority actions cascade through all levels of planning and evaluation.
- WACHS strategic and service development programs and projects (projects) are appropriately planned and evaluated to maximise the likelihood of achieving intended outcomes and to ensure evaluation reporting can provide a transparent account of project achievements and accountability for funding allocation.
- Monitoring and evaluation plans are relative to the scale and scope of projects and developed in the early, pre-implementation stage.
- Monitoring and evaluation are conducted throughout the lifetime of the project.
- Evaluation results are communicated to improve future service design, equity, and outcomes.
- Consumer and carer engagement is embedded in project planning, design, delivery, measurement and evaluation of systems and services (as per National Safety and Quality Health Service Standard 2 and Recommendation 4 of the SHR).
- Aboriginal consumers are involved in the design, delivery, and evaluation of services.
- Aboriginal Impact Statement or Health Equity and Impact Statements are completed to consider the interests of, potential impacts on, and opportunities for Aboriginal people. This consideration contributes to growing and sustaining a culturally responsive organisation.
- Work in partnership with organisations that have necessary expertise to develop culturally appropriate and responsive services.
- Promote Aboriginal cultural authority in shaping and implementing services.
- Develop the ability to measure and understand consumer assessments of cultural safety in service delivery in support of continuous improvement and evaluation.

Table 1: Types of Planning

| | Type | Perspective | Focus | Outputs | Governance | Timeframe | |
|---------------------------|--------------------|----------------------------|---|--|---|--|--------------------------------|
| Levels of Planning | Strategic | System Planning | National and State priorities for health improvement based on disease patterns and health status | National or State-wide Frameworks | Frameworks and plans e.g. The Sustainable Health Review The Clinical Services Framework State Public Health Plan for WA | System Manager – National and State Organisations | 10+ years |
| | | WACHS Strategic Planning | Sets the direction and incorporates system planning initiatives, based on the health needs of the population and priority groups. | WACHS wide priorities | WACHS Strategic Plan Specialty/Service Strategies | WACHS Board and Executive | 5 years |
| | Operational | WACHS Operational Planning | Identifies strategies and programs to implement the priorities and actions from the Strategic Plan | WACHS programs / projects | The WACHS Operational Plan | WACHS Executive | 1-2 years |
| | | Health Service Planning | Aligns existing health service delivery with changing patterns of need to make the most effective use of available resources | Detailed specialty or geographic area service planning | A health service plan that focuses on a specialty or geographic area | WACHS Executive | 5+ years |
| | | Action Planning | Demonstrates how strategic goals have been translated into tangible actions and projects and to track implementation progress | Region / District / Program / Strategy | Action Plan – a high level summary document that outlines short-medium term priorities | Regional Executive/ Chief Operating Officer/, Tier 4 Directors | 1-2 years |
| | Project | Project Planning | Defines the rationale, goals, objectives of projects and the activities required to achieve desired outcomes and how a project, program or service development initiative will be evaluated | WACHS programs/ projects/service development | Project plan that includes an implementation timeline and monitoring and evaluation plan | Dependent on project type, and scale with oversight by Executive | Dependent on length of project |

3. Roles and Responsibilities

The **Executive Director Strategy, Service Development and Innovation and relevant executive sub-committee** are responsible for:

- this policy, its implementation and review
- overseeing the delivery of strategic initiatives and service planning, development and evaluation
- providing oversight and governance to ensure accountability for project progress, completion, and endorsement.

The Executive Director of Strategy, Service Development and Innovation is the chair of the executive sub-committee.

Directors of Strategy, Service Development and Change are the facilitators of the policy within their region. They are responsible for ensuring program or project staff are aware of and adhere to the policy for all planning and evaluation activity. They may also link project staff with the P and E team and/or direct them to relevant planning and evaluation templates.

The **WACHS Planning and Evaluation team** (P and E) are responsible for providing support and consultancy for WACHS-wide service strategy development, service planning, infrastructure planning, project planning and evaluation. The team also supports WACHS-wide operational planning. WACHS staff can access advice and data from the central team and, subject to capacity, the team can support planning and evaluation processes. External consultants can be used to facilitate planning and evaluation processes supported by data, templates and review by WACHS P and E team.

The team can support WACHS staff to develop plans that align with the CSF, WACHS strategic directions, contemporary workforce models and new and emerging innovations.

Specifically, the P and E team should be consulted to:

- coordinate WACHS operational planning to operationalise the WACHS Strategic Plan
- support and build WACHS capacity in operational and/or action planning and/or project planning and/or evaluation planning
- support WACHS' clinical and program areas to shape and articulate WACHS clinical/service strategies (e.g., cancer, maternity, mental health)
- inform WACHS strategy by providing analysis of the needs and health service demand of the population in the development of options, briefings, concept, discussion and position papers
- develop or assist with health service plans relating to a particular specialty or geographic area (subject to capacity)
- review or evaluate population health needs, demography, epidemiology, burden of disease and resident hospital demand (historical and forecast)
- advise and support the development of project/program/service development plans, including implementation and evaluation planning
- advise on and/or conduct program/project evaluation and preparation of evaluation reports (subject to capacity).

4. Monitoring and Evaluation

4.1 Monitoring

The policy will be monitored by the Manager, Planning and Evaluation to ensure it aligns with contemporary practice and is being implemented as intended. Any concerns regarding policy compliance or implementation will be raised through the Executive Sub-Committee.

4.2 Evaluation

This policy will be reviewed every three years to determine effectiveness, relevance and currency of information. The Manager, Planning and Evaluation will review the implementation of the policy through the Executive Sub-Committee and through the same, address any improvements.

5. Compliance

This policy is in alignment with the *Health Services Act 2016*.

Failure to comply with this policy may constitute a breach of the WA Health Code of Conduct (Code). The Code is part of the [Integrity Policy Framework](#) issued pursuant to Section 26 of the *Health Services Act 2016* and is binding on all WACHS staff which for this purpose includes trainees, students, volunteers, researchers, contractors for service (including all visiting health professionals and agency staff) and persons delivering training or education within WACHS.

WACHS staff are reminded that compliance with all policies and procedures is mandatory.

6. References

Nil

7. Definitions

| Term | Definition |
|---------------------|--|
| Action Plans | An action plan highlights the strategic priorities and key projects to be actioned by a [Region/District/Program/Strategy] within a short to medium timeframe. Its purpose is to demonstrate how strategic goals have been translated into tangible actions and projects and to track implementation progress. Action Plans do not replace the need for detailed project planning. |
| Evaluation | Evaluation involves the appraisal of data and information as systematically and objectively as possible. It assesses what was done and how it was done to better understand what changed because of the program or service. A key outcome of the evaluation process is in identifying and recommending improvements for the future. |

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| Evaluation Plan | This should be a section within the project plan. Evaluation planning establishes up front how a project, program or service development initiative will be evaluated. Monitoring and evaluation plans define how to implement project evaluation: what information needs to be collected, when, how and by whom. |
| Health Service Plan | Health service specific document that addresses strategic directions and priorities for a specialty or geographic area. They provide detail about the service delivery, workforce models and technology required to implement services. They are future oriented (5-10 years) and informed by and aligned with the WA CSF, relevant state-based policies, strategies and frameworks and the international evidence base. |
| Monitoring | Monitoring, also known as process evaluation, is conducted throughout the project to ensure the project is being implemented as intended. It aligns with the project activities and uses specific data metrics to indicate if the project is progressing as expected. Monitoring can identify areas for improvement and help you achieve goals more efficiently by periodically assessing and adapting program activities to ensure they are as effective as they can be. |
| Operational Plan | Creates a detailed roadmap for the achievement of the strategic plan, by translating it into short term activities and/or milestones over a defined period (usually 1-2 years). |
| Project Plan | A project plan clearly articulates why the project is being undertaken, what the project aims to achieve and how the project will be implemented to realise intended outcomes. Project planning must occur at the beginning of a project and include a detailed implementation timeline and evaluation and monitoring plan. Project plans can apply to service development planning, state-wide program planning and/or individual project planning. |
| Service Development | Service development (sometimes referred to as service design) is the process of designing or improving specific services to meet the needs and expectations of a defined population or health need. |
| WACHS Strategic Plan | A system wide plan that describes the long-term focus of the organisation with key strategic priorities identified for a three to five-year period. |
| WACHS Strategies | WACHS strategies (e.g., WACHS Cancer Strategy or WACHS Aboriginal Health Strategy) document the strategic directions and priorities/actions for a particular specialty, service or population. These documents guide planning for the specialty area, usually for a 5-year time-period. |

8. Document Summary

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|---|---|
| Coverage | WACHS-wide |
| Audience | All staff |
| Records Management | Corporate Recordkeeping Compliance Policy |
| Related Legislation | Public Health Act 2016 (WA) Health Services Act 2016 (WA) |
| Related Mandatory Policies / Frameworks | <ul style="list-style-type: none"> • Clinical Services Planning and Programs Framework |
| Related WACHS Policy Documents | Nil |
| Other Related Documents | <ul style="list-style-type: none"> • WA Clinical Services Framework 2020 Addendum • WA Health Clinical Services Framework 2014-2024 • WA Sustainable Health Review 2019 • WACHS Aboriginal Health Strategy 2019-14 • WACHS Cultural Governance Framework |
| Related Forms | Nil |
| Related Training Packages | WACHS LMS Evaluation Essentials |
| Aboriginal Health Impact Statement Declaration (ISD) | ISD Record ID: 2893 |
| National Safety and Quality Health Service (NSQHS) Standards | 1.1(c), 2.11(a), 2.11(b) |
| Aged Care Quality Standards | Nil |
| Chief Psychiatrist's Standards for Clinical Care | Nil |

9. Document Control

| Version | Published date | Current from | Summary of changes |
|---------|----------------|---------------|---|
| 4.00 | 16 April 2024 | 16 April 2024 | <ul style="list-style-type: none"> change of title, previously Strategy, Planning and Service Development Policy Clinical Service Planning Policy and Strategy, Planning and Service Development Guideline rescinded as this information is now incorporated into this policy policy content updated in line with contemporary practice and current climate. evaluation content included in policy. |

10. Approval

| | |
|--|---|
| Policy Owner | Executive Director Strategy, Service Development and Innovation |
| Co-approver | Chief Operating Officer |
| Contact | Manager, Planning and Evaluation |
| Business Unit | Planning and Evaluation |
| EDRMS # | ED-CO-24-24374 |
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