

Family Health Teams

Advancing Primary Health Care

BUSINESS AND OPERATIONAL PLAN EVALUATION MATRIX

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Evaluation Matrix

Family Health Team Identification

This is a list of the questions derived from information requested in the Guide to Business and Operational Plans.

Item	Criteria
1	<p>Strategy</p> <ul style="list-style-type: none"> • What type of submission is this e.g. new FHT, conversion from PCN, Academic sciences, University, Rural, First Nations. • Does the plan address principles on page 6 Section 3.2 of the Guide to Business and Operational Plan Development? • Is there a vision/ mission statement? • Does the submission clearly demonstrate FHT collaboration and integration with community partners to avoid duplication with other similar services in the area e.g. mental health • Does the submission clearly demonstrate an increase in service and benefits to the population? • Is the target population identified and how their needs are being addressed? • Is there a critical path identified for FHT implementation? • Is there flexibility to make adjustments to implementation as a result of feedback and experience?
2	<p>Governance and Accountability</p> <ul style="list-style-type: none"> • Is there a governance framework defined including such entities as Executive or Steering Group, and Advisory Group? • Are Management Responsibilities defined for: <ul style="list-style-type: none"> • Planning • Financial • Budget process • Controls • HR Management • Risk Management • Accountability • Dispute Resolution • IT
3	<p>Business and Operational Plan Model</p> <ul style="list-style-type: none"> • Population <ul style="list-style-type: none"> - How does the current patient numbers and the proposed additional patients compare against expectations? • Are all Core programs and services proposed? <ul style="list-style-type: none"> - Identify any Core programs or services that require further scrutiny. • Are there 'other' proposed programs and services? • Is FHT proposing to supply 'optional' services and if so, how? • As per Section 5.1.3 on page 10 of the guide, are key milestones and timelines described? • As per Section 5.1.3 on page 10 of the guide, are linkages with other service delivery organizations described?

Item	Criteria
4	<p>Human Resources</p> <ul style="list-style-type: none"> • Identify any issues in recruitment plan including lack of substantiation for resources, treatment of legacy resources (pre-existing positions), ratio of NP to physicians etc. • Does the FHT contain practitioners whose roles map to the Guide to Interdisciplinary Team Roles and Responsibilities as follows: <ul style="list-style-type: none"> • Physician • Nurse Practitioners • Nurses • Midwife • Dietician • Pharmacist • Chiropodist / Podiatrist • Mental Health Addiction Professionals • Physiotherapist • Occupational Therapist • Chiropractor • Does submission contain other roles? Are they defined clearly? • Are expected dates for recruitment supplied? • Does the compensation for physicians conform with the models in guide to Physician Compensation? • How does proposed compensation for non-physician benchmark against proposed type of resource and compensation? • Are existing providers differentiated from new staff? • Has a letter of commitment been attached for committed FHT providers? • Collaborative Team Practice <ul style="list-style-type: none"> - Is contribution of interdisciplinary team identified? - Is timeframe identified for fully functional team? • Are training requirements identified and justified in submission?
5	<p>Locations</p> <ul style="list-style-type: none"> • Are there any issues regarding site selections and justifications? • Are timelines provided for locations? • Is there a need for licensing of special services such as IHF license?
6	<p>Support Systems</p> <p>Information Technology</p> <ul style="list-style-type: none"> • Have funding sources been identified? • Has funding already been received? • For any IT hardware resources that are requested from the ministry, have the FHT team members they will support been identified? • Is IT administration system detailed? • Is electronic patient information system (Electronic Medical Records) system identified? • Is the proposed EMR system conformance tested?

Item	Criteria
7	<p>Other</p> <ul style="list-style-type: none"> • Are plans and anticipated timelines identified for implementing extended hours of service? • Are plans and anticipated timelines identified for implementing on-call THAS service? • Are key milestones and estimated timelines for implementation plans for any Other (research, teaching or other programs) discussed? • Evaluation Process for measuring effectiveness of how well the Family Health Team is achieving its intended goals and objectives according to the strategic plan. • Transition Funding <ul style="list-style-type: none"> - Is the funding requested eligible and consistent with guidelines given in guide to Transitional Funding? • Is there a justification of location costs? • Are practice moving costs involved? • Are lease buy out or termination penalties involved? • Is there an itemized list of expenditures? • Is there a formal assessment and floor plans for facility renovations? • Is transition plan justified in the submission in terms of scope, effort and timeframe?
8	<p>Financial Forecast</p> <ul style="list-style-type: none"> • Does the overall budget align with spending per capita of patient population taking into account target roster population and target patient population? • Has the reasonableness of costs such as compensation, space, IT been demonstrated in submission? • Is there a commitment of long term funding by local contributions to support the FHT? • Has a letter been provided indicating the above commitment?
9	<p>Annual Operational Plans</p> <ul style="list-style-type: none"> • Are major activities identified? • Are timelines substantiated? • Is resource requirement defined by year? • Is funding by ministry identified? • Is funding from community partners identified? • Is funding from other sources identified?