Guidelines for the Implementation of the VMSG Dashboard Public Health Performance Management System

The effective implementation of a performance management system will involve several processes and factors. Based on years of successful (and a few unsuccessful) implementations of the VMSG Dashboard Public Health Performance Management System, we would like to outline many of these. In this document, we'll cover these topics.

Topics
(click for topic detail)

1. Where to start

a. Training

Before you begin the process of developing and entering your plans into the VMSG Dashboard, please review the online training curriculums outlined in section 5 of this document. Upon completion of these video-based training modules, we will schedule several live, web-based training sessions with your team. These hour-long sessions generally consist of:

1) **VMSG Dashboard Overview** (all users): This 45 minute session will introduce all Dashboard users to the VMSG Dashboard features and functions. This pre-requisite course provides the context for the following training sessions. In addition, this session will introduce the users to the procedures to get their login credentials, update their passwords and navigate the Quick-Update system for "Occasional Users".

2) **Managers and Supervisors** (Planners): These people generally develop and enter plans into the Dashboard system. During these training sessions, we generally review your plans, which have already been partially entered into the system. We will often complete more of the existing plan in the system. Please participate in the **VMSG Dashboard Overview** before this training course.

3) **System Administrators** (Org Admin Users): These people generally become part of the "train-the-trainer" team who will work with the other users as needed. These live training sessions focus on the background administrative functions of the Dashboard.

4) **Occasional Users**: These are the people who generally respond to the Real-Time Planning email notifications using the Quick-Update feature. This training generally focuses on managing account credentials and the use of the Quick-Update screens. This material is first covered in the **VMSG Dashboard Overview** pre-requisite course and need not be repeated.

Once you have completed most of the online and live training sessions, you are ready to develop and enter your plans.

b. Step by Step Plan Development

The VMSG Dashboard is a planning and execution system. It brings your existing and future plans to life. Creating and entering operational plans is a simple, step-by-step process. Let's walk through the development and entry of a small example plan.

In Appendix 1, we have included an Operational Plan Template to be used in developing operational plans in the VMSG Dashboard. Please see the completed template at the end of this section.

For this example, we'll create a plan for "**Tobacco Cessation**" in the **Community Health Division** (CHD). Here are the steps:

1) Navigate to the **Groups** tab and select "Community Health Division" (or wherever the Tobacco Cessation program would reside in your department)

2) Select the **Services/Initiatives** tab
3) Click the blue ➕ button to add a new Service/Initiative
4) In the **Service/Initiative** field, enter "*Tobacco Cessation Program*"
   a. Since this is usually an ongoing program, we'll **not** check the **Initiative** checkbox
5) Click the **Save** (💾) button to save your information

6) Select the **Goals** tab
7) Click the blue ➕ button to add a new **Goal**
8) As the first Goal, enter "*Reduce smoking in high schools*"
   a. NOTE: There could be several other similar Goals like:
      i. "Reduce smoking in public places"
      ii. "Reduce smoking while driving"
9) Set the **Traffic Light** status flag for the Goal
   a. **Green** – Everything is proceeding as planned (most common)
   b. **Yellow** – Something may be out of tolerance and needs to be adjusted
   c. **Red** – Something has stopped the planning element from proceeding
   d. **Gold** – the planning element and all sub-elements have been successfully completed
10) Click the **Save** (💾) button to save your information

11) Select the **Objectives** tab
12) Click the blue ➕ button to add a new Objective
13) Enter the **SMART** (**S**pecific-**M**easurable-**A**ttainable-**R**ealistic-**T**ime-Based) Objective *"Reduce smoking by 25% at **Desert Vista High School** by the **end of this school year**"* in the Objective field
    a. This SMART Objective establishes the target to be reached/accomplished within a given time frame
14) Click the **Save** (💾) button to save your information
15) Select the drop-down arrow next to the **Objective Lead** field
16) If the User for the desired Objective Lead is not visible, click the **Show All Users** button to see everyone in the department in alphabetical order.
17) Click on the name of the desired Objective Lead person
18) Click the **Save** (💾) button on the pop-up window to save your information
19) Set the **Traffic Light** status flag for the Objective
    a. **Green** – Everything is proceeding as planned
    b. **Yellow** – Something may be off track and needs to be adjusted
    c. **Red** – Something has stopped the planning element from proceeding
    d. **Gold** – the planning element and all sub-elements have been successfully completed

20) Click the **Save** (🖫) button to save your information

21)   Select the **Activities** tab
      a. The Activities are the finite steps to be taken to achieve the Objective

22) Click the blue ✚ button to add a new Project-Based Activity (1)

23) Enter "*Survey Desert Vista students on smoking to determine the baseline*"

24) Select "**Project-Based Activity**" from the **Activity Type** dropdown list

25) Enter "*Survey completed, analyzed and baseline established*" in the **Performance Metric/Target** field.
      a. This entry answers the question "How do we know when the Activity has been successfully completed?"

26) In the **Start Date** field, enter today's date

27) In the **End Date** field, enter a date about 60 days from today

28) In the **% Done** field, enter 0 since we haven't started the Activity yet.

29) Click the **Save** (🖫) button to save your information

30) Select the **Pencil/Paper** (✐) button to the right of the **Activity Leader & Team Members** table at the bottom left

31) On the **Select Activity Leader & Team** window, select the **Team Lead** and all **Team Members** by checking (✔) the appropriate column in front of the User's name. Select the user or users who will receive the scheduled status **emails** from the Dashboard.
      a. NOTE: if the desired Team Lead or Team Members are not displayed, click the red ❌ next to the **Group** drop down. If you know which Group the Users are in, you can choose the Group from the dropdown list.
      b. NOTE: If you would like to have multiple **Team Leads**, please contact your system administrator to adjust the Organization-wide setting allowing multiple team leads.

32) When all Team Members are selected, click the **Save/Exit** (🖫)button in the bottom right corner of the screen to save your selections and return to the **Activities** screen.

33) Set the **Traffic Light** status flag for the Activity by clicking through the 4 lights or selecting from the drop-down list.
      a. **Green** – Everything is proceeding as planned
      b. **Yellow** – Something may be off track and needs to be adjusted
      c. **Red** – Something has stopped the planning element from proceeding
      d. **Gold** – the planning element and all sub-elements have been successfully completed

34) Click the **Save** (🖫) button to save your information

35) Click the blue ✚ button to add a new Project-Based Activity (2)

36) Enter "*Create training for students and faculty on the dangers of smoking*"

37) Select "**Project-Based Activity**" from the **Activity Type** dropdown list

38) Enter "*Training content and materials created*" in the **Performance Metric/Target** field.

39) In the **Start Date** field, enter today's date

40) In the **End Date** field, enter a date about 60 days from today

41) In the **% Done** field, enter 0 since we haven't started the Activity yet.

42) Click the **Save** (🖫) button to save your information

43) Click the blue **+** button to add a new Quality Assurance Activity (3)

44) Enter "*Provide 9 monthly training sessions on the dangers of smoking to students and faculty*"

45) Select "**Quality Assurance Activity**" from the **Activity Type** dropdown list

46) In the **Quality Assurance Activity Wizard**, select **Monthly** in the **Frequency** dropdown

47) Enter **a Start Date** for the monthly cycle of the beginning date of next month

48) In the **Green** value box, enter 9 (if 9 or more sessions per month, the lights turns green)

49) In the **Red** value box, enter 6 (if 6 or fewer sessions/month = red light)

50) In the **Metric Type** box type "*training sessions completed*"

51) Click the **Save** (🖫) button on the wizard to save your information

52) Notice the **Performance Metric/Target** field is completed for you.

53) Enter **8** in the **Actual #** field. The light should turn yellow when you leave the field

54) Click the **Save** (🖫) button to save your information

55) Select the **Team Lead** and all **Team Members** as in the first Activity above

56) Click the blue **+** button to add a new Quantitative Measurement Activity (4)

57) Enter "*Contact all 20 tobacco vendors within 1 mile of Desert Vista High School to assure they are not selling to minors*"

58) Select "**Quantitative Measurement Activity**" from the **Activity Type** dropdown list

59) In the **Start Date** field, enter today's date

60) In the **End Date** field, enter a date about 60 days from today

61) In the Target box, enter 20

62) In the Metric Type box type "*Tobacco vendors contacted*"

63) In the **Data Entry Type** selection, select "**Enter a value to add to total**"

   a.   This will add to the total monthly number each time the Activity is updated

64) Click the **Save** (🖫) button on the wizard to save your information

65) Notice the **Performance Metric/Target** field is completed for you.

66) Enter 10 in the **Add to** field. The calculation of the **Actual #** should show a total to 10

67) Click the **Save** (🖫) button to save your information

68) Select the **Team Lead** and all **Team Members** as in the first Activity above

69) **Congratulations**. You have now created an Operational Plan for Tobacco Cessation in high schools.

Please review the **Operational Plan Template** below to see how this can help you to structure your plans before entering them into the VMSG Dashboard. The full template is in Appendix 1 at the end of this document.

Operational Plan Template

Service/Initiative:	(What bucket of work/priority does this relate to?) **Tobacco Cessation Program**
Goal 1:	(What is your" pie in the sky" goal?) **Reduce smoking in high schools**

	Implementation Steps				
SMART Objective *(Specifically, what & when do you hope to accomplish)*	**Objective Lead** *(Who will lead the charge?)*	**Activities** *(What are the steps you will do to accomplish the objective?)*	**Performance Metrics** *(How will I know that we've successfully completed the activity)*	**Activity Leads** *(Who is primarily responsible to do/update this Activity?)*	**Target Dates for completion**
1. **Reduce smoking by 25% at Desert Vista High School by the end of the school year**	John Doe	1. **Survey Desert Vista students on smoking to determine the baseline**	**Survey completed, analyzed and baseline established**	Jane Doe	8/30/ 2020
		2. **Create training for students and faculty on the dangers of smoking**	**Training content and materials created**	Bill Smith	9/30/2020
		3. **Provide 9 monthly training sessions on the dangers of smoking to students and faculty**	**Monthly training provided** >=9 = Green >6 <9 = Yellow <=6 = Red	Bill Smith	10/1/2020
		4. **Contact all 20 tobacco vendors within 1 mile of Wayne High School to assure they are not selling to minors**	**20 vendors contacted**	John Doe	5/30/20
		5.			
2.		1.			
		2.			
		3.			

Existing/Initial Plan Entry

If you are seeking PHAB Accreditation or Re-Accreditation, the easiest place to start is by entering and implementing your PHAB "6-pack" of plans. If you are not seeking Accreditation or Re-Accreditation but have similar plans, enter them. Please refer to the Step-by-Step section above for details on entering plan elements.

NOTE: KCA would be happy to help you structure your plans into the system to get you started. Please remember that there are online training modules for all the steps we'll describe here.

PHAB "6-pack"

- Strategic Plan
- Community Health Assessment Plan
- Community Health Improvement Plan
- Quality Improvement Plan
- Workforce Development Plan
- Emergency Operations Plan

Enter these plans by:

a. Create a "Group" for each plan. Typically, under the Department level. Something like:
    a. 1-Strategic Plan
    b. 2-CHA
    c. 3-CHIP
    d. 4-QI
    e. 5-WFD
    f. 6-PHEP

To enter a Group, select the parent group then click the blue **+** button to add a new Group (sub-Group) under the selected parent Group.

The numbers preceding the plan name serve to alphabetize the Group List under the parent Group (Dept).

When asked to select permissions, you may want to select "View." This allows everyone to see the Group, but only Org Admin users can edit anything in the Group. This can easily be updated for each selected User from the User Management screen from the Main Menu.

NOTE: Only Users with Org Admin permissions can create new Groups.

b. The next step will be to enter the Services/Initiatives. In the Strategic Plan, these are typically called Strategic Priorities or something similar. In the Strategic Plan, these are typically marked as Initiatives because they generally refer to a future state.

Under each Service/Initiative, enter the hierarchical planning elements:

- Services/Initiatives
  - Goals
    - Objectives (SMART format)
      - Activities (often called Action Steps)

Most plans are already structured this way. Often the Strategic Plan only goes down to the Objective level. If this is the case, it may be a good exercise to develop specific Activities which will yield the successful completion of the Objective when completed. This is sometimes done in a future team exercise.

NOTE: Many plans can easily be copied/pasted into the Dashboard. To do this, select the text from the source plan (usually a .DOC or .PDF file), then push Ctrl-C (Copy) on the keyboard. Next, select the appropriate field in the Dashboard and push Ctrl-V (Paste) on the keyboard. When copying from .PDF files, you may have to manually remove hard carriage returns by deleting them and replacing them with a "space."

c. Once you have entered a plan (or while you are entering the plan), set the following fields:
- **Objective Lead** on the Objectives screen
- **Activity Lead, Team Members** and **eMail Recipients** on the Activities screen
- Activity **Start** and **End Dates** on the Activities screen
- **% Done** or Status field signifying the current status of the Activity
- The **Traffic Light** status flags at Goal, Objective and Activity levels
  - **Green** – Everything is proceeding as planned
  - **Yellow** – Something may be out of tolerance and needs to be adjusted
  - **Red** – Something has stopped the planning element from proceeding
  - **Gold** – the planning element and all sub-elements have been successfully completed

d. Your Dashboard is now LIVE. Time to setup the **Real-Time Planning eMail Notifications**. One of your system administrators can do this by:
  a. Navigate to the MAIN MENU
  b. Select the SETTINGS button
  c. Select the NOTIFICATIONS tab
  d. Turn the notifications on by selecting YES in the first drop-down
  e. Set the notifications frequency as desired
     i. Monthly is typical
  f. Set the triggers (most leave all three active)
     i. Has the user updated their information in the last 30 days?
     ii. Does the user have any Activities behind schedule?
     iii. Does the user have any Activities overdue?
  g. eMails will go out on the selected day(s) if any of the three criteria are met to all users designated as Objective or Activity Leads

NOTE: If your department's Strategic Plan (or other primary plan) is already developed, KCA will be happy to work with you to enter this plan in the system. If your plan is under development, KCA will work with you to structure the plan to best fit into the Dashboard planning methodology. Once the plan is in the Dashboard, we can work together to "operationalize" the plan. This typically involves creating very specific Activities to be performed in a specific timeframe by a specific team of internal and external people. The Activity teams should be distributed and assigned to folks throughout the department (and, potentially, some external partners). The assigned team leaders will receive regular email notifications from the Dashboard (typically, monthly) to update their assigned Objectives and Activities. This update process will take no more than five minutes per month. This is a great way to introduce the department to the VMSG Dashboard. This process immediately brings your Strategic Plan to life with the involvement of people across the entire organization.

d. New Plan Development

Once your existing plans are entered and "operationalized," you're ready to develop new plans. Typically, the next plans for the Dashboard are operational plans for each bureau, division, office and program. These plans outline the ongoing Services provided by each operational unit of the health department as well as the future Initiatives the unit will be performing.

Each Group will typically have one or more operational plans. The operational plan is the "project plan" for the Group including the Services the group provides to the department, community and partners as well as the Initiatives the Group plans to provide in the future. The Services and Initiatives are the "**What** we do or plan to do." The Goals, Objectives and Activities define "**How** we do or will do" the Services or Initiatives.

Plan Development: If these plans are not yet developed or are due for an update, the Dashboard can guide you through the entire planning process. The typical steps for developing operational plans are:

1) **Services/Initiatives**: For each Group (bureau, division, office, program, etc.), first determine the Services provided or the Initiatives to be provided to the constituents, partners or the department. Services and Initiatives are merely a short description of the Service to be provided or Initiative to be developed. Some examples might be:
   a. Services for WIC
      i. Provide nutrition consultations to WIC clients
      ii. Issue WIC checks to WIC clients
   b. Initiative for WIC
      i. Transition from WIC paper checks to Electronic Benefits Transfer/Electronic payments
   c. Services for Public Health Emergency Preparedness (PHEP)
      i. Perform table-top exercises
      ii. Perform full-scale exercises
      iii. Perform bio-hazard training

        d.   Initiatives for PHEP
             i.   Work with Epidemiology to determine upcoming threats

2) **Goals, Objectives and Activities**: For each Service and Initiative, determine the Goals, the Objectives and the Activities that will define how the department will execute the Service or Initiative. Objectives are typically developed in the SMART format (Specific, Measurable, Attainable, Realistic, Time-based). An example of a Goal, a SMART Objective and some Activities for the above WIC Initiative might be:

        a.   INITIATIVE: Transition from WIC paper checks to Electronic Benefits Transfer/Electronic payments
             i.   GOAL: Develop a project plan to transition to WIC EBT
                    1.   OBJECTIVE: By June 30, 2017, contact three health departments who have implemented WIC EBT for advice on best practices.
                            a.   ACTIVITY: Contact abc health department
                            b.   ACTIVITY: Contact xyz health department

At the Objective and Activity levels, you will assign timeframes, leaders and team members, and external partners for the execution of the plans.

2. Lessons learned implementing performance management systems

Here are some of the lessons learned in past implementations:

- You will get **push back** from some people in the department:
    a. I don't have time to update anything
    b. I'm not technical
    c. We've always done it another way
    d. I'm retiring soon and don't want to learn anything new
    e. I'm just a zzzzzzzzzzzz, this doesn't apply to me

  80% - 90% of the people in the department will only be "occasional users." They will only need to update their assigned Objectives or Activities in response to the system-generated email notification. On average, their entire update process will take less than **five minutes per month**. Very few people can say that they can't spare five minutes a month for the benefit of the department. KCA will be happy to provide live training to these folks as needed.

- **Senior management sponsors** need to be involved from day one. Their continuous support of the process will show everyone that this is not just a new fad, but a tool to help the department get better at the jobs of public health.

- Start from the **top down**. Directors & Managers usually understand the need for planning and performance management. Once they buy in, they can promote the positive aspects to their team.

- Promote a little "**team spirit**" about becoming the next health department in your state to become accredited or reaccredited. Use the performance management system to monitor progress toward accreditation or reaccreditation. Assign Activities and Objectives to all staff to get them completely involved in the process and success.

- **Critical**: Promote the Green, Yellow, Red & Gold flags as status and, potentially, a request for help from management. As soon as staff believes that they are punitive, every flag will be green.

- Promote the fact that you want to **involve everyone** in the department and external partners in the success of Public Health in your community. Let them see how their activities contribute to the bigger picture by showing how everything flows up the "pyramid" and are directly related to the department strategic priorities.

- Show them how an operational plan can help them to plan and execute their daily functions at the department. "If you don't know where you're going, how do you know when you've arrived?"

- Initially, work with those who love using technology and tools like the Dashboard. They will become advocates to their peers.

- There will be some who don't like change for any reason. Sometimes until they retire 😊.

- Everyone in the department will, eventually, be assigned to Objectives or Activities. If not, why are they there?

- It is a process. It won't happen overnight.

- Progress over Perfection. Slow, steady progress will get you to the end goal.

3. Technical issues for implementation

The VMSG Dashboard is a completely cloud/web-based system that requires no program installation on your systems or in your network. By carefully following the following guidelines and suggestions, you can assure the best user experience with the Dashboard.

Web Browsers: To implement the VMSG Dashboard, you need only to use one of the preferred web browsers to access the system:

a. Google Chrome – latest version
b. Firefox – latest version
   We have found the Chrome and Firefox browsers to be the best and fastest browsers for the implementation of the Dashboard. Both of these browsers are free and available for most computer platforms.
c. Microsoft Edge Chromium for Windows 10
   The newest version of Microsoft Edge browser is based on the Google Chrome browser and seems to work as well as Chrome. You can download the browser here:
   https://www.microsoft.com/en-us/edge
d. Apple Safari – latest version
   Safari works well with the Dashboard. There are a few noted minor issues with font size on some screens.
e. Microsoft Internet Explorer (IE) and Edge (legacy version) browsers are **NOT RECOMMENDED** for use with the Dashboard. We have found many issues with speed and the rendering of screens. Therefore, unfortunately, we cannot support older Microsoft browsers with the Dashboard.
f. **NOTE**: If a pop-up blocker is active on your browser, please add https://LA.VMSGDashboard.com (primary servers) and https://n442.fmphost.com (training server) as an exception to allow pop-ups for dialog boxes from the Dashboard.
   a. Chrome: Settings – Advanced – Site Settings – Pop-ups and redirects – Allow – Add
   b. Firefox: Settings – Options – Privacy & Security – Block pop-up windows – Exceptions
   c. Edge Chromium: Settings –Site Permissions – Allow - Add
g. Set the browser to ask where to save downloaded files (for reports and document management).
   a. Chrome: Settings – Advanced – Downloads – "Ask where to save each file before downloading"
   b. Firefox: Settings – Options – Files and Applications – Downloads – "Always ask you where to save files"
   c. Edge Chromium: Settings – Downloads – "Ask where to save each file before downloading"
h. **NOTE**: Ideally, this web browser will be set as the default browser on the system. The Dashboard uses email notifications with a link back to the system for regular updates. It is best (but not required) if the link launches the Dashboard in the selected browser.

i.   There are free add-ons available for most browsers to do spell/grammar checking. We've used Grammarly for Chrome. It is also available for Firefox and Edge Chromium.

Email and SPAM Filters: The VMSG Dashboard communicates with users, primarily, through email. It is important to the successful implementation and operation of the Dashboard to have access to these emails. To facilitate this, please have your IT or mail server folks add the following email domains to your "whitelist":

- @KCA-Inc.com
- @VMSGDashboard.com

Network and Firewalls: It is highly recommended that you work with your IT team to assure that there is a robust network connection through the firewall to our servers at https://LA.VMSGDashboard.com (primary servers) and https://n442.fmphost.com (training server)

Shared Internet Connections: The VMSG Dashboard requires nearly constant communication between the server and the browser. Time-sliced Internet connections don't work well with the system. If your Internet connection is shared with a heavy bandwidth application like a Voice Over IP phone system or lots of video streaming, please work with your IT department to assure that the connection from your users to our servers is not affected.

Security: The VMSG Dashboard is accessed via Secure Socket Layer (SSL/HTTPS) protocol between the client's web browser and our servers. All traffic to and from the servers is encrypted to "bank-level" security. In addition, all plans and documents stored on the servers are compressed and encrypted to the same level. We **do not**, however, recommend that any personally identifiable healthcare information be stored on the VMSG Dashboard system.

4. User Types

The VMSG Dashboard was created with a variety of user classes in mind.

- **Normal Users** (planning updates and management)
  - Access to all planning functions
  - Cannot delete higher level planning elements (above Objectives)
  - Cannot add Groups
  - Can limit read/write and read-only access by Group
  - Cannot see hidden services
  - Access to most reports

- **Managers** (planning updates and management)
  - Access to all planning functions
  - Can delete higher level planning elements (Services and Goals)
  - Cannot delete Groups
  - Can see hidden services
  - Can activate Partners
  - Access to most reports

- **Partner Users** (planning element status updates and reporting)
  - Access to selected Groups
  - Cannot edit planning elements
  - Can only update Goal/Objective/Activity status

- **System Administrators (Org Admin)** (manage all background functions in the Dashboard)
  - Access to all system functions
  - Can add/edit/delete Groups
  - Manage Users
  - Manage Categories & Sub-Categories
  - Can see hidden services
  - Can activate Partners
  - Access to all reports
  - Access to **VMSG Public** for creating public interface web pages

- **Read-Only Users** (reporting, status monitoring)
  - Can see selected Groups but not edit anything
  - Can run some reports

5. Training

The different classes of users require different training courses. For that reason, the Dashboard has 4 built-in, video-based training curriculums for all types of users.

The first training task is to classify users. We have found that Dashboard users fall into the following classes with the following percentages (approximate):

1) **System Administrators/SuperUsers – 5%** - These users have full access to all features of the system. There is typically an admin user at each division/bureau in the department. These users also become the in-house trainers and support by default. They can manage users, categories, groups, etc. All admin users should communicate with each other regularly, since they have the authority to edit/change/delete anything in the system. These users should take:
   a. **User training**
   b. **Administrator training**
   c. **Operational Planning Process training**

2) **Management and "Normal" Users – 10%** - These users typically create, edit, assign leaders and categorize plans for their divisions, bureaus, offices or programs. Anyone who will be developing, editing or managing plans in the system should be classified as a Management or Normal user. Once the initial plans are created/entered, they are typically updated quarterly or as needed based on the current public health environment (flu, Zika, etc.). These users should take:
   a. **User training**
   b. **Operational Planning Process training**

3) **Occasional Users – 85%** - These users typically have been assigned as Objective and/or Activity leaders. Most often, these users merely respond to the regularly scheduled system status emails by clicking on the link in the message, logging into the Quick Update function and updating the status of their assigned Objectives and Activities. These users should take:
   a. **Occasional User training**

The following training curriculums are available via these links or from the Help/Info system in the Dashboard.

User Training

> https://www.youtube.com/playlist?list=PLtakD9sONPaokUIxxe2P1KVELqZ4p3Q4B
>
> 1 Hour, 32 minutes total
>
> 27 modules
>
> > Average 3 minutes

Administrator Training

> https://www.youtube.com/playlist?list=PLtakD9sONPar-Vxk24EeApPvimo72tfQS
>
> 23 Minutes total
>
> 8 Modules
>
> > Average < 3 minutes

Occasional User Training

> https://www.youtube.com/playlist?list=PLtakD9sONParie50U3PiElGfBhCuxc8ZF
>
> 27 minutes total
>
> 8 modules
>
> > Average ~3 minutes

Operational Planning Process

> https://www.youtube.com/playlist?list=PLtakD9sONParVmx1MYRLV7oYxLSFYn0Pq
>
> 45 minutes total
>
> 4 Modules
>
> > Average ~ 11 minutes

Video-based training curriculums are broken down into short modules. These may be taken all at once or over the course of time, depending on the specific user. Users are typically assigned to complete their required training modules in a specified time frame before scheduling the live, web-conference based training session(s). Training can be completed individually or in groups.

Some departments bring the user classes together into a training or conference room to review the video-based training modules together. This can be done in 3 sessions:

1) **Administrator Training** for the designated system admins

2) **User Training and Operational Planning Process Training** for admins, management and normal users.

3) **Occasional User Training** for the occasional users

NOTE: If you plan on doing interactive training on computers in a training environment, please contact KCA to setup a training group and sub-groups for each user to avoid all users writing into the same Group and overwriting each other.

Upon completion of these online, video-based training modules, we will schedule several live, web-based training sessions with your team. These sessions generally consist of:

5) **VMSG Dashboard Overview** (all users): This 45 minute session will introduce all Dashboard users to the VMSG Dashboard features and functions. This pre-requisite course provides the context for the following training sessions. In addition, this session will introduce the users to the procedures to get their login credentials, update their passwords and navigate the Quick-Update system for "Occasional Users".

6) **Managers and Supervisors** (Planners): These people generally develop and enter plans into the Dashboard system. During these training sessions, we generally review your plans, which have already been partially entered into the system. We will often complete more of the existing plan in the system. Please participate in the **VMSG Dashboard Overview** before this training course.

7) **System Administrators** (Org Admin Users): These people generally become part of the "train-the-trainer" team who will work with the other users as needed. These live training sessions focus on the background administrative functions of the Dashboard.

8) **Occasional Users**: These are the people who generally respond to the Real-Time Planning email notifications using the Quick-Update feature. This training generally focuses on managing account credentials and the use of the Quick-Update screens. This material is first covered in the **VMSG Dashboard Overview** pre-requisite course and need not be repeated.

6. Other Operational Plan Implementation Tools

Real-Time Planning: Once your plan is in the Dashboard, you can establish automated eMail reminders to each person assigned as an Objective or Activity leader. If the Objectives or Activities are lagging or overdue, the leader will get an email reminding them to update their information through the "Quick Update" feature in the Dashboard. This process only takes 3 – 5 minutes to complete for the assigned leader. Please refer to the training modules for Real-Time Planning.

One of your system administrators can do this by:
   a. Navigate to the MAIN MENU
   b. Select the SETTINGS button
   c. Select the NOTIFICATIONS tab
   d. Turn the notifications on by selecting YES in the first drop-down
   e. Set the notifications frequency as desired
       i. Monthly is typical
   f. Set the triggers (most leave all three active)
       i. Has the user updated their information in the last 30 days?
       ii. Does the user have any Activities behind schedule?
       iii. Does the user have any Activities overdue?
   g. eMails will go out on the selected day(s) if any of the three criteria are met to all users designated as Objective or Activity Leads

3-Dimensional Planning allows you to categorize specific elements of any or all of the plans against a set of standards. Standard categories in the system are Essentials of Public Health, PHAB Accreditation Domains, Standards and Measures, Strategic Priorities, etc. The Categories and Sub-Categories can be added and edited as desired by the department. Once the planning elements are categorized, you can look across all of the plans in the system to see commonalities, gaps and overlaps in the plans. Please see the training modules for 3-Dimensional Planning.

Automated Transparency: It seems like there is a big push within public health to be very transparent with the status of public health programs. The **VMSG Public** interface allows your department to share any or all your performance indicators with the public, partners, constituents and your community. Simply choose the performance indicators you'd like to share, then publish them to a web page(s) for your department website. Couldn't be easier. Please see the Help/Information system and the VMSG Public User Guide for more information.

7. **Rolling out the Dashboard to the Department**

The implementation of a performance management system is generally done in an incremental approach. There are many factors which will determine the timeframe of the rollout. Some of these are:

a. **Plan Status** - Are most of your plans already developed?
    a. Are they in a similar format to the Dashboard (Services/Initiatives, Goals, Objectives and Activities)?
b. **Technophiles** – These people generally like to use technology to make their job easier and/or better for their constituents. These are often the best people to start with.
c. **Technophobes** – Some people just don't like technology or even afraid of technology. We have found that these folks are a much more difficult "sell."
d. **Change-phobes** – Some people like things to remain the same. "Doing it the way it's always been done." They don't like or are concerned about any changes.
e. **Not my job** – Even if it only takes 5 minutes a month to update plans in the Dashboard, some people don't want to participate.
f. **Too busy** – Everyone in public health is busy. A performance management system can help everyone organize their positions and make them less busy. With a finite plan of execution, it's more difficult to get off track.
g. **Senior Management support** – It is critical to have the support of the senior management staff in the implementation of a performance management system. When the Health Director/Chief Health Officer/Health Commissioner and their senior staff are "bought-in" to performance management, most of their subordinates will quickly fall in line.
h. **Accreditation/Reaccreditation** – Health departments in this process are required to implement a performance management system of some type (PHAB Standard 9.1). The VMSG Dashboard has been proven to be "Fully Demonstrated" by PHAB for 9.1.
i. **Quality Improvement/Performance Improvement** – These folks usually have a good understanding of the value of a performance management system in the planning and execution process.
j. **Information Technology (IT)** – You will need the support of your IT staff to assist with issues related to browser installation, network bandwidth, firewall related issues, security, etc.
k. **Getting Started** – Choose a small team including Senior Management representatives, Quality Improvement/Performance Improvement folks, IT, and Technophiles.
    a. **Self-Paced Training** – Each team member should go through the video-based training modules for their assigned user type:
        i. **Admin Users** – User Training, Admin Training and Operational Plan Development training (approximately 2 hours 20 minutes)
        ii. **Normal, Management, Read-Only or Partner User** – User Training and Operational Plan Development training (approximately 2 hours)
    b. **Live Training** – Once the video-based training is completed, schedule live/Go2Meeting training sessions with KCA to answer questions and review some live examples.

8. "Selling" the usefulness and engaging employees in performance management

The implementation of a performance management system is easier if the team believes that the system is of value to the department and not just additional "busy work" for them. Some of the selling points are:

a. 80-90 percent of the users of the system will only spend 3 - 5 minutes a month updating their assigned Activities and Objectives. When they are assigned as an Objective or Activity leader, the system will email them on a regular basis to update their specific planning elements. The "Quick Update" feature of the Dashboard makes regular updates to the planning element status quick and easy.

b. When staff are assigned to Objectives and Activities, they can immediately see how their assigned activities contribute to the overall health department.

   a. Their Activities support one or more Objectives

   b. These Objectives support specific Goals which support specific Services or Initiatives

c. Performance Management is a requirement for PHAB accreditation and reaccreditation (Standard 9.1).

   a. There are many cited benefits to accreditation. See the section "Accreditation and reaccreditation implications"

d. Operational plans provide guidance of specific Activities for the team members

   a. It's easy to see your progress against the plan in real-time at any time.

e. Operational plans help form and manage teams to implement the plans

9. Accreditation and reaccreditation implications

Accreditation: PHAB accreditation Standard 9.1 *"Use a Performance Management System to Monitor Achievement of Organizational Objectives"* and its related measures 9.1.1 A through 9.1.5 A provide specific guidance for the implementation and complete integration of a performance management system across the entire department.

In each case, the VMSG Dashboard has been designated as "**Fully Demonstrated**" by PHAB for Standard 9.1.

Reaccreditation: PHAB reaccreditation Measure 9.1 "*The achievement of goals and objectives is monitored by the health department using a performance management system*" drives the performance management system implementation deeper into the department and all of the PHAB required plans.

PHAB accreditation has many cited benefits:
Health departments have reported the following benefits of accreditation:
- Stimulated quality and performance improvement opportunities,
- Allowed the health department to better identify strengths and weaknesses,
- Improved management processes, and
- Stimulated greater accountability and transparency within the health department
- Identifies strengths and areas for improvement
- Strengthens internal and external partnerships
- Encourages health departments to prioritize and address long-standing concerns
- Acts as a "stimulus…for continuous quality improvement and performance management in our daily practice."
- Accountability to external stakeholders,
- Competitiveness for funding opportunities, and
- Communication with the governing entity.

10. Accreditation and reaccreditation project plans

The VMSG Dashboard has PHAB Accreditation/Reaccreditation automated project plans built into the system. There are specific plans for State, Local and Tribal departments. KCA is happy to work with you to implement these plans and can help you to assign Domain/Standard/Measure leaders and Activity dates across the entire plan to get you up and running quickly.

Through the implementation of these plans, you can easily manage and track your progress toward Accreditation and Reaccreditation. You will have a separate Dashboard screen to show you the overall status and progress of the Accreditation/Reaccreditation process and all of the staff and partners involved.

Appendix 1: Operational Plan Template

Service/Initiative:	*(What bucket of work/priority does this relate to?)*				
Goal 1:	*(What is your" pie in the sky" goal?)*				
	Implementation Steps				
SMART Objectives *(Specifically, what & when do you hope to accomplish)*	**Objective Lead** *(Who will lead the charge?)*	**Activities** *(What are the steps you will do to accomplish the objective?)*	**Performance Metrics** *(How will I know that we've successfully completed the activity)*	**Activity Leads** *(Who is primarily responsible to do/update this Activity?)*	**Target Dates for completion**
1.		1.			
		2.			
		3.			
2.		1.			
		2.			
		3.			
3.		1.			
		2.			
		3.			
4.		1.			
		2.			
		3.			

Service/Initiative:					
Goal 2:					
	Implementation Steps				
SMART Objectives	**Objective Lead**	**Activities**	**Performance Metrics**	**Activity Leads**	**Target Dates for completion**
1.		1.			
		2.			
		3.			
2.		1.			
		2.			
		3.			
3.		1.			
		2.			
		3.			
4.		1.			
		2.			
		3.			

Service/Initiative:					
Goal 3:					
	Implementation Steps				
SMART Objectives	**Objective Lead**	**Activities**	**Performance Metrics**	**Activity Leads**	**Target Dates for completion**
1.		1.			
		2.			
		3.			
2.		1.			
		2.			
		3.			
3.		1.			
		2.			
		3.			
4.		1.			
		2.			
		3.			