

C.03 Operational Planning

1.0 INTRODUCTION/BACKGROUND

It is generally accepted that *“If you fail to plan: you plan to fail”*. Mercy Services sees an annual Operational Plan as an organised and comprehensive way of assessing competing needs/interests and determining which ones will be adopted.

In keeping with best organisational practice Mercy Services will regularly assess how best to apply it's vision and mission in response to current community needs. The resulting Strategic Plan will provide the overall vision and major objectives that are discerned as the most appropriate way of striving to meet the organisation's mission in the medium term.

2.0 SCOPE

This policy describes how Mercy Services plans the adoption and implementation of long and short term objectives. It applies to all parts of Mercy Services.

3.0 POLICY STATEMENT

Mercy Services will develop an annual Operational Plan as an organised and comprehensive way of assessing competing needs/interests and determining which actions will be adopted in the following year.

The Operational Plan is an internal document that is designed to support the implementation of the longer term Strategic Plan objectives and more immediate objectives of established Mercy Services programs and of Mercy Services support functions (administration, finance, quality improvement, learning & development, OHS and HR).

In the interests of streamlining planning and reporting systems the contents of the Operational Plan will be integrated into the Planned Improvements of the Mercy Services Quality Improvement/Accreditation work plan.

The General Manager is responsible for ensuring the development, implementation and monitoring of an annual Operational Plan.

4.0 PROCEDURES

The planning and evaluation of the operations of Mercy Services is the responsibility of the General Manager as delegated by the Board of Directors. In fulfilling this role the General Manager consults appropriately with staff/volunteers and the Board.

- 4.0.1** The General Manager will ensure that all Service Coordinators and key organisational support personnel are provided with a list of Strategic Plan objectives relevant to their position.

Service Coordinators and key organisational support personnel are to identify activities that they need to complete in the coming financial year to progress their section of the Strategic Plan.

- 4.0.2** Service Coordinators are to invite relevant staff/volunteers (and a session for clients) to an annual program review meeting. The duration of the service planning sessions depend on the nature, size, staffing, client need and complexity of the particular Service.

This meeting will also involve the Manager overseeing this section of the organisation. The meeting will include:

1. Review of applicable objectives from the Mercy Services Strategic Plan;
2. Review the service description (aims) and evidence based practice;
3. Key performance indicators, client, volunteer and staff satisfaction results, information from the Appreciations and Complaints Register;
4. Review OHS issues, incidents and injuries over past year;
5. Review environmental responsibility outcomes;
6. Review participation and unmet needs of potential and actual clients especially those from target groups;
7. Review interaction with other relevant agencies including Aboriginal, ethnic and cultural organisations;
8. Personnel issues - succession planning for all positions in this program; any relevant issues that were raised in staff Review & Development sessions
9. Discuss what is working well;
10. Are there ways we could:
 - help individual clients with preventable/recoverable issues make lasting changes in their life,
 - Improve the way we think and talk about clients with a persistent/degenerative condition e.g., a strengths based/empowering approach;
11. Discuss how can we better address Mercy Values and the National Health Priorities (see Appendix 1); and
12. Recommend improvements what we do and how we do it – over next 12 months and next 3 years? (see Appendix 2)

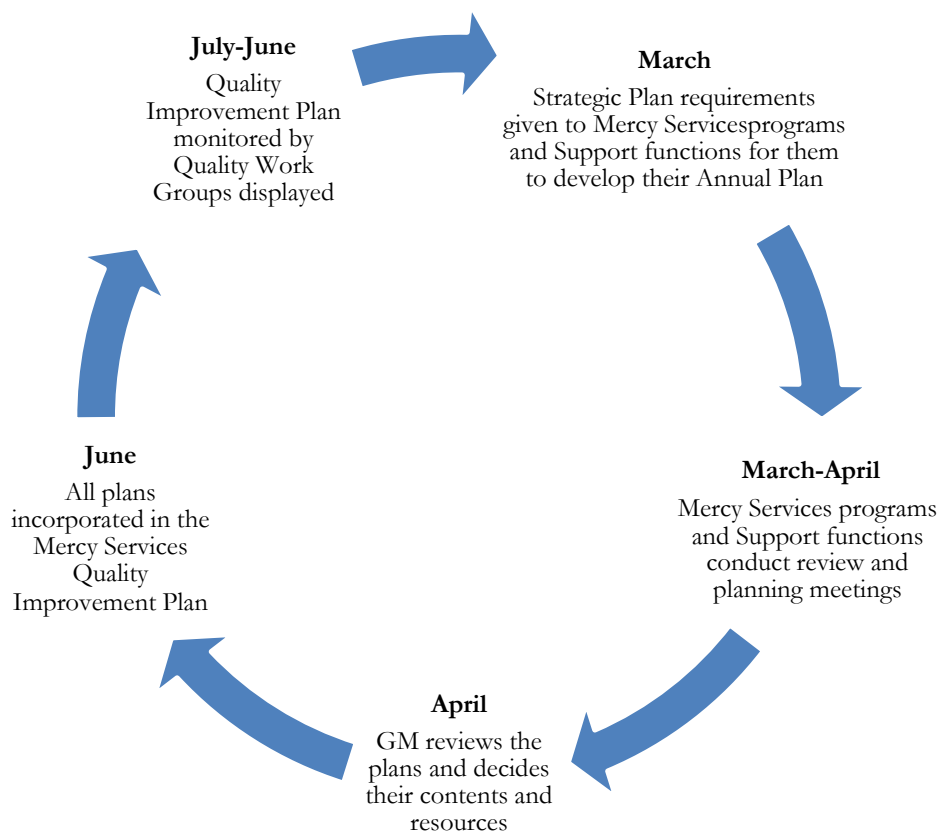
- 4.0.3** Organisational Support Functions (administration, finance, quality improvement, learning & development, OHS and HR) will have an Operational Plan. The Operational Plans for these functions will be prepared by the relevant key organisational support personnel using the process set out in 4.0.2.

- 4.0.4** The General Manager will approve, reject or modify Operational Plans.

- 4.0.5** The General Manager will allocate resources for the implementation of Operational Plans during the annual Budget preparation process.

- 4.0.6 The General Manager will ensure that all Operational Plans are integrated into the Planned Improvements of the Mercy Services Quality Improvement/Accreditation work plan.
- 4.0.7 The implementation of Operational Plans/ Mercy Services Quality Improvement/Accreditation work plan will be monitored by the General Manager and the Mercy Services Quality Improvement/Accreditation work group.

Chart 1 Mercy Services Annual Planning Cycle



5.0 REFERENCES

1. Australian Standards	a) AS/NZS 4360: <i>Risk Management</i>
2. Legislation	a) Corporations Act 2001 (Cth) b) Occupational Health & Safety Act, 2000 (NSW)
3. Professional guidelines	a) nil
4. Codes of Practice	a) nil
5. Codes of Ethics	a) nil
6. Evidence	a) nil
7. Mercy Services Values	a) Justice, Respect, Care, Unity, Service

6.0 OTHER RELATED POLICIES AND PROCEDURES

Policy sections

- A. Values Policies
- B. Board Policies
- C. Organisation Management
- D. Financial Management / Administration Policies
- E. Service Delivery
- F. Staff / Volunteers Policies
- G. Occupational Health & Safety Policies

7.0 RELATIONSHIP WITH STANDARDS

Community Care Common Standards	Disability Standards	EQulP Standards
1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 1.7, 1.8, 2.1, 2.2, 2.3, 2.4, 2.5, 3.1, 3.3, 3.4, 3.5	2.6, 3.1.b, 3.5, 8.3, 8.5,	1.4.1, 1.6.1, 2.1.1, 2.1.3, 2.2.1, 2.3.4, 2.4.1, 3.1.1

8.0 DOCUMENT CHANGES RECORD

Dates of change	Section altered	Natures of changes made
July 2001	Section 2 Governance Policy Section 3 Board of Directors Policy	First record of relevant policy First record of relevant policy
12/10/2009	a) All sections	a) Major rewrite
18/01/2010	4.0.2	Addition of questions on addressing client disadvantage
17/02/2010	4.02	Addition of OHS issues
15/06/2010	4.02	Addition of succession planning
18/02/2011	a) 4.02 b) 7.0	a) Addition of Environmental Responsibility b) Updated with new Community Care and EQulP standards
13/09/2011	3.0, 4.0, 4.02, 4.07	Minor typo.s corrected and issues from staff Review & Development added to Annual Operational Plans
14/11/2012	All Sections	Organisation name updated
Review due 14/11/2015		

APPENDIX 1: Population Health Principles and Strategies

Mercy Services sees as essential the prevention of illness and the increasing of staff/volunteer client experience of physical/mental/social health. This is the whole of society approach towards health promotion advocated by the Ottawa Charter:

Health promotion is the process of enabling people to increase control over, and to improve, their health. To reach a state of complete physical, mental and social well-being, an individual or group must be able to identify and to realize aspirations, to satisfy needs, and to change or cope with the environment. Health is, therefore, seen as a resource for everyday life, not the objective of living. Health is a positive concept emphasizing social and personal resources, as well as physical capacities. Therefore, health promotion is not just the responsibility of the health sector, but goes beyond healthy life-styles to well-being.

World Health Organisation Ottawa Charter for Health Promotion 1986

http://www.who.int/hpr/NPH/docs/ottawa_charter_hp.pdf

Mercy Services will focus attention on Australia's National Health Priority Areas. By improving client health in these areas we improve their ability to function and cooperate with staff. In the same way healthy staff are better able to fulfill their roles and enjoy life/work more.

The National Health Priority Areas are:

- cardiovascular health (since 1996)
- cancer control (since 1996)
- injury prevention and control (since 1996)
- mental health (since 1996)
- diabetes mellitus (since 1997)
- asthma (since 1999)
- arthritis and musculoskeletal conditions (since 2002)
- obesity (since 2008)

Examples of Mercy Services activities addressing the National Health Priorities includes:

- ✓ providing access or education material about healthy lifestyle options to both consumers / patients and staff e.g., smoking cessation or reminding client's to bring a hat & sunscreen to outdoor activities.
- ✓ information on ongoing care for a chronic health condition e.g., wound care, diet
- ✓ facilitating access to health improvement activities, e.g., exercise classes, home improvements to eliminate falls risks
- ✓ displaying promotional information from other agencies, e.g., information and fundraising around Cancer at "Australia's Biggest Morning Tea".
- ✓ providing vaccinations, e.g., hepatitis, Fluvax

Further information on the National Health Priority Areas:

<http://www.aihw.gov.au/nhpa/index.cfm>

APPENDIX 2: Format of Operational Plans (same as EQUIP Planned Improvements)

Number	What will we do	Why are we doing this/What will it achieve?	Resources required	Responsibility	Timeframe