



**Vancouver**  
**Division of Family Practice**  
An FPSC initiative

# A Workbook to Support PCN Steering Committee Initiatives

---

Workbook Version 3: APRIL 16<sup>TH</sup>, 2024

## ACKNOWLEDGEMENTS

The development of this tool was guided by the Fraser Health *Community Planning Tool: Applying a Health Equity Lens to Program Planning*. We acknowledge the strong work showcased by this tool.

### Land Acknowledgement

The Vancouver Division of Family Practice and our membership and partners acknowledge that the work we do occurs on the traditional and unceded territories of the Coast Salish Nations of Musqueam, Tsleil-Waututh and Squamish. We are very pleased that these host Nations who each operate their own primary care centers, are our valued partners.

The Musqueam (pronounced Mus-kwee-um) traditional territory includes what is now Vancouver and surrounding areas. Today, parts of Musqueam's traditional territory are called: Vancouver, North Vancouver, South Vancouver, Burrard Inlet, New Westminster, Burnaby, and Richmond. The name xwm θkw y' m (Musqueam) means "People of the River Grass." Today, the Musqueam have three reserves in Metro Vancouver. This is a very small portion of their traditional territory.

Tsleil-Waututh (pronounced Slay-wah-tuth) people's traditional territory reaches from the Fraser River in the south to Mamquam Lake in the north. Their oral history and archaeological evidence shows that they have lived in the lands and waters of their traditional territory surrounding the Burrard Inlet for thousands of years. Tsleil-Waututh means People of the Inlet. They are sometimes called the "Children of the Takaya" or "Children of the Wolf".

The Squamish Nation (pronounced Skwa-mish) traditional territory covers present day Metro Vancouver, Gibson's Landing and the Squamish River watershed. The Squamish Nation has occupied and governed their territory since beyond recorded history. The Squamish People's traditional language is Skwxwú7mesh Snichim. The Skwxwú7mesh Snichim, although in danger of being lost, is still an important part of the Squamish culture. The Squamish Nation has 24 reserves, and four of these are in Metro Vancouver and others extend up the coast.

The three Nations have signed agreements honoring their shared territory and their role as host Nations in Metro Vancouver.

## BACKGROUND

---

In response to a constantly shifting landscape, and feedback from physicians and partners, in late 2022, the Family Practice Services Committee (FPSC) committed to refreshing the approach to Primary Care Networks (PCNs). The FPSC met with partners to discuss opportunities to improve the PCN model. The aim is to improve patient access to quality primary care in five priority areas:

1. Empowering physician leadership and community connections
2. Strengthening team-based care
3. Creating opportunities for innovative PCN clinic models
4. Engaging with First Nations
5. Strengthening supports for patient attachment

Each year, each PCN Steering Committee will identify an initiative aligned to one of the eight PCN core attributes to facilitate the Province’s team-based care primary care strategy. This workbook is intended to support the PCN Steering Committees to:

- Bring small scale PCN ideas to life in project form.
- Apply a consistent approach to project success – ensuring key steps are undertaken for each initiative.
- Allow the PCN Steering Committees to complete the key steps in tandem – supporting timely execution.
- Facilitate progress reporting to key stakeholders.
- Facilitate knowledge sharing between PCN Steering Committees.

Undertaking annual initiatives in this way will support PCN Steering Committees to be local decision-makers, collaborators, and project implementors.

---

## PCN INITIATIVE LIFECYCLE: FIVE KEY STEPS

---

1  ASSESS NEEDS

2  BRAINSTORM

3  PLAN

4  ACT & MONITOR

5  CLOSE & SHARE

---

## TABLE OF CONTENTS

---

1. ACKNOWLEDGEMENTS	2
2. PREAMBLE	3
• BACKGROUND	3
• PCN INITIATIVE LIFECYCLE: FIVE KEY STEPS	3
3. PCN INITIATIVE OVERVIEW: Information About Requirements & Available Resources	5
• PCN INITIATIVE REQUIREMENTS	6
• USING THIS WORKBOOK	7
• CORE ROLES & RESPONSIBILITIES	8
• AVAILABLE RESOURCES	9
• TIMING & REPORTING REQUIREMENTS	10
• CITY-WIDE STEERING COMMITTEE MEETING REQUIREMENTS	11
4. STEPS #1 THROUGH #5: Activities & Supports to Execute on PCN Initiatives	12
• STEP #1: ASSESS NEEDS	13
• STEP #2: BRAINSTORM	15
• STEP #3: PLAN	17
• STEP #4: ACT & MONITOR	19
• STEP #5: CLOSE & SHARE	21
5. APPENDICES: Templates to Support Steps #1 through #5 of PCN Initiatives	23
• APPENDIX: STEP #1: ASSESS NEEDS	24
• REPORT OF OUTCOMES: NEEDS ASSESSMENT	25
• STAKEHOLDER CONSULTATION: SUMMARY OF FINDINGS	26
• APPENDIX: STEP #2: BRAINSTORM	27
• REPORT OF OUTCOMES: INITIATIVE OVERVIEW	28
• BRAINSTORM CAPTURE	30
• APPENDIX: STEP #3: PLAN	31
• REPORT OF OUTCOMES: PLANNING OVERVIEW	32
• PROJECT PLAN	34
• BUDGET	35
• RISK MANAGEMENT PLAN	36
• APPENDIX: STEP #4: ACT & MONITOR	37
• REPORT OF OUTCOMES: PROGRESS REPORT	38
• APPENDIX: STEP #5: CLOSE & SHARE	39
• STEP 5: REPORT OF OUTCOMES: RESULTS & LEARNINGS	40

---

---

# PCN INITIATIVE OVERVIEW

---

INFORMATION ABOUT REQUIREMENTS & AVAILABLE RESOURCES

---

## PCN INITIATIVE REQUIREMENTS

---

There are six PCN Steering Committees that fall under the Vancouver Division of Family Practice (VDoFP). In pursuit of the goals and objectives for Primary Care Networks, each Steering Committee will identify and execute one small scale initiative or project per year. The initiative will fall under one of the eight PCN core attributes. Specifically, projects will fall under one of the following:

1. Access and attachment to quality primary care
2. Extended hours
3. Same day access to urgent care
4. Advice and information
5. Comprehensive primary care
6. Culturally safe care
7. Coordinated care
8. Clear communication

Each PCN Steering Committee will identify a focused annual initiative suited to their specific community needs. Over five years, each committee should complete initiatives aligned to five of the eight core attributes. The order in which the attributes are tackled is at the discretion of each Steering Committee.

The six Vancouver-based PCN Steering Committees will use the five step initiative lifecycle outlined in this workbook to apply a consistent approach to project success, ensuring key steps are undertaken for each initiative.

The Steering Committees will work through the five steps in tandem. There will be shared expectations across Steering Committees regarding when steps will be completed and progress reports submitted to the VDoFP, its Board, and other stakeholders as deemed applicable. Undertaking initiatives in this way will support PCN Steering Committees to be local decision-makers, collaborators, and project implementors.

The Vancouver Division of Family Practice reserves the right to amend these requirements to remain responsive to feedback from physicians and other stakeholders, community needs, the shifting political landscape, etc.

---

### SUMMARY OF REQUIREMENTS

- There are eight PCN core attributes. Each PCN Steering Committee must identify and complete one small scale initiative per year aligned to one of the eight core attributes.
  - Over five years, each committee should complete initiatives aligned to five of the eight core attributes – the order in which the attributes are addressed is at the discretion of each committee.
  - Each initiative must undertake the five steps outlined in this workbook.
  - Timing and reporting requirements established by the Vancouver Division of Family Practice must be followed.
- 
-



## USING THIS WORKBOOK

---

This workbook is designed to support the PCN Steering Committees to identify and execute annual initiatives focused on strengthening the Primary Care Networks in their respective communities. The workbook can be applied regardless of the initiative chosen. It will support the PCN Steering Committees to:

- Bring small scale PCN ideas to life in project form.
- Apply a consistent approach to supporting the success of initiatives – ensuring key steps are undertaken for each initiative and keeping initiatives on track.
- Complete the key steps in tandem – ensuring timely progress in strengthening PCNs and the ability to collaborate and learn from the initiatives and experiences of other Steering Committees.
- Share progress reports with the VDoFP, its Board, and key stakeholders as applicable.
- Share knowledge between PCN Steering Committees – supporting increased success on initiatives year over year.

The workbook is based on five critical steps to support the success of PCN Steering Committee initiatives. Key activities are identified for each step. This workbook will ensure that these critical steps and activities are considered for all initiatives. There may be additional steps and/or activities needed depending on the unique nature of the initiatives conceptualized by the committees.

---

### PCN INITIATIVE LIFECYCLE: FIVE KEY STEPS

---

1  ASSESS NEEDS

2  BRAINSTORM

3  PLAN

4  ACT & MONITOR

5  CLOSE & SHARE

---

The key activities identified for each step will support the PCN Steering Committees to fulfill the expected outcomes and reporting requirements for the step. This workbook includes templates to support key activities and to report on the key outcomes for each step.

Dates for completing each step and submitting reporting will be provided by the Vancouver Division of Family Practice.

---

---

### TIPS FOR USING THIS WORKBOOK

- Prior to starting a step, review the documentation requirements and outcomes to be reported on for the step – keep these end-goals in mind when embarking on the step.
  - Review key activities for the step – determine if additional activities are required to support the initiative.
  - Plan and undertake key activities for the step – ensure outcomes will be achieved within the timeframes established by the Vancouver Division of Family Practice.
  - Complete the templates required to facilitate and report on each step.
  - Submit required reporting/documentation to the Vancouver Division of Family Practice as required for each step.
- 
- 

## CORE ROLES & RESPONSIBILITIES

---

There are three core roles that will remain consistent regardless of the initiative undertaken by the PCN Steering Committee.

---

PCN Steering Committee Convener	<ul style="list-style-type: none"><li>• The PCN Steering Committee Convener is essentially the Committee’s Chair.</li><li>• The Steering Committee Convener is a member of, and appointed by, the VDOFP’s Board of Directors, and ideally practices in that PCN.</li><li>• The Convener will ensure the PCN Steering Committee is supported to:<ul style="list-style-type: none"><li>○ Identify the issue or opportunity facing the group;</li><li>○ Clarify the purpose of the initiative or collaborative effort;</li><li>○ Determine who might initially be invited to the collaborative table based on the membership requirements;</li><li>○ Seek input from partners about their engagement, role, and potential contributions; and</li><li>○ Seek buy-in from collaborative partners and work toward a shared approach to advancing the initiative or collaborative effort.</li></ul></li><li>• The Convener relays direction, insights and feedback from the Board pertaining to PCN initiatives and is a voice for the initiative at the Board table.</li><li>• The Convener is the key contact to the PCN Steering Committee Consultant.</li><li>• Additional information about the role of Convener is found in the Terms of Reference.</li></ul>
PCN Steering Committee Consultant (Committee Consultant)	<ul style="list-style-type: none"><li>• Each PCN Steering Committee will be allocated a consulting resource.</li><li>• This individual will lead the PCN Steering Committee through the five steps included in this workbook and, with the input and support of the Steering Committee, completes required reporting/documentation.</li><li>• The individual provides expertise and advice pertaining to project management and specific initiatives, assists in securing resources, facilitates execution of the initiative and supports the initiative to stay on track and/or shift or adjust if required.</li><li>• The Committee Consultant submits reporting/documentation to the VDoFP as required.</li></ul>
PCN Steering Committee Members	<ul style="list-style-type: none"><li>• The members of the PCN Steering Committee provide input, expertise and feedback; assist in making community/stakeholder connections; and take on key responsibilities related to executing on the initiative as applicable.</li></ul>

---



## AVAILABLE RESOURCES

---

PCN Steering Committees will complete their initiatives within the constraints of available resources – time, budget, and human resource capacity. The VDoFP will communicate timing and available resources to all PCN Steering Committees prior to the start of the PCN initiative lifecycle; typically during Phase #1: Launch (see City-Wide Steering Committee Meeting Requirements for further details).

---

- |      |   |
|------|---|
| Time | <ul style="list-style-type: none"><li>• The PCN Steering Committee will complete one initiative annually over a 12-month period.</li><li>• In year-one (2024/25), this period runs April through April; however, timing is subject to change going forward based on lessons learned, streamlining of the process, availability of resources, etc.</li></ul> |
|------|---|
- 

- |        |  |
|--------|--|
| Budget | <ul style="list-style-type: none"><li>• Each PCN Steering Committee will be provided with a budget specifically allocated to the annual initiative.</li><li>• The budget will be \$50,000 in year-one (2024/25). This is subject to change based on available funding.</li></ul> |
|--------|--|
- 

- |                         |   |
|-------------------------|---|
| Human Resource Capacity | <ul style="list-style-type: none"><li>• In addition to the budget provided, each PCN Steering Committee will be allocated consulting time (a PCN Steering Committee Consultant) and time for Steering Committee members to support their initiative.</li><li>• Typically, consulting time will be in the range of 10- to 15-hours per month per PCN Steering Committee. This is subject to change based on available funding and capacity.</li><li>• Typically, Steering Committee member time will be 3- to 4-hours per month per member, spread over the 12-month period.</li></ul> |
|-------------------------|---|
- 

The ultimate plan for the initiative must align to the resources available. Templates are provided to facilitate project planning and budgeting during Step #3 of the PCN initiative lifecycle. Should the project plan and budget initially conceived of not match the resources available, the Steering Committee may seek additional resources (e.g., through potential partners, resource sharing, gifts in-kind, etc.) and/or make adjustments (e.g., shift approaches, tactics or scope; reallocate resources; or revamp goals) to create a plan and budget that is realistic and achievable.

---






## TIMING & REPORTING REQUIREMENTS

The PCN initiative lifecycle takes place over a 12-month period. Vancouver’s six PCN Steering Committees will move through the lifecycle in tandem and submit Reports of Outcomes and key documentation at designated intervals. Reports and supporting documentation will be submitted to the VDoFP for feedback/approval. Reporting and supporting documentation will be shared with the VDoFP Board and other stakeholders as appropriate.

Typically, the Report of Outcomes and supporting documentation will be submitted at the end of each step in the initiative lifecycle. The exception is Step #4. Step #4 is Act & Monitor. During this step, progress reports and supporting documentation will be submitted at approximately one-third and two-thirds of the way through the execution of the initiative. The intent is to provide progress updates and for interventions to be made if an initiative is at risk of going off track.

The cycle will run April through April in year-one (2024/25). Timing is subject to change going forward based on lessons learned, streamlining of the process, availability of resources, and other factors. For illustration purposes the timing for 2024/25 is outlined below. Document submission timeframes are designed to ensure that required documentation is submitted prior to city-wide steering committee meetings (see City-wide Steering Committee Requirements for further details).

### PCN INITIATIVE LIFECYCLE: FIVE KEY STEPS

		EXECUTE	DOCUMENTATION SUBMITTED
1	 ASSESS NEEDS	Mid-April through May	End-May
2	 BRAINSTORM	May through July	Mid-July
3	 PLAN	July through September	End-September
4	 ACT & MONITOR	September through March	End-October End-January
5	 CLOSE & SHARE	March through mid-April	End-March

Templates for the Report of Outcomes and to support the key activities for each step are included in this workbook. To facilitate the ability to document and to access/review the information provided, it is requested that all documentation be kept brief and succinct.

# CITY-WIDE STEERING COMMITTEE MEETING REQUIREMENTS

The Vancouver Division of Family Practice will convene Vancouver’s six PCN Steering Committees three times per year, and as required, for the purpose of supporting the PCN initiatives.

There are four phases of collaboration for the six PCN Steering Committees. Phase #4 consolidates with Phase #1 as the next year is launched in a cyclical manner; thus, there will typically be three meetings of the committees. The specific timing of all meetings/collaborations will be communicated by the VDoFP. The timing for year-one (2024/25) is provided below for illustration purposes.

PHASE	DESCRIPTION	MEETING TIMING
Phase #1: Launch	<ul style="list-style-type: none"> <li>Discuss requirements for the PCN annual initiative</li> <li>Respond to questions; provide clarifications</li> <li>Brainstorm strategies for stakeholder engagement in Step #1</li> </ul>	Mid-April
Phase #2: Initiative Overviews	<ul style="list-style-type: none"> <li>Provide overviews of each PCN initiative</li> <li>Brainstorm to support the success of each initiative; flag and troubleshoot potential barriers to success</li> <li>Share learnings from Steps #1 &amp; #2 of the initiative lifecycle</li> </ul>	End-July; PCN Steering Committees have completed Steps #1 and #2
Phase #3: Progress Update	<ul style="list-style-type: none"> <li>Update the progress of each PCN initiative</li> <li>Brainstorm to support the success of each initiative; flag and troubleshoot potential barriers to success</li> <li>Share learnings from Steps #3 and Step #4 to-date</li> </ul>	Mid-November; PCN Steering Committees have completed Step #3 and are approx. halfway through Step #4
Phase #4: Results & Knowledge Sharing	<ul style="list-style-type: none"> <li>Overview of the results and impacts of each initiative</li> <li>Overview of lessons learned from each initiative and over the course of the initiative lifecycle</li> <li>This phase consolidates with Phase #1 as the next year is launched in a cyclical manner</li> </ul>	Mid-April; PCN Steering Committees have Completed Steps #4 and #5

In addition, each PCN Steering Committee will meet on a regular basis to support their own annual initiative and to address other business.

---

# STEPS #1 THROUGH #5

---

## ACTIVITIES AND SUPPORTS TO EXECUTE ON PCN INITIATIVES

---

### TIPS FOR USING THIS WORKBOOK

- Prior to starting a step, review the documentation requirements and outcomes to be reported on for the step – keep these end-goals in mind when embarking on the step.
  - Review key activities for the step – determine if additional activities are required to support the initiative.
  - Plan and undertake key activities for the step – ensure outcomes will be achieved within the timeframes established by the Vancouver Division of Family Practice.
  - Complete the templates required to facilitate and report on each step.
  - Submit required reporting/documentation to the Vancouver Division of Family Practice as required for each step.
-

# PCN INITIATIVE LIFECYCLE: STEP #1

1



## ASSESS NEEDS

- Engage with key stakeholders to assess needs – uncover PCN strengths, needs/gaps/barriers to success and underlying challenges
- Assess needs through additional means (as applicable)

## STEP 1: KEY ACTIVITIES

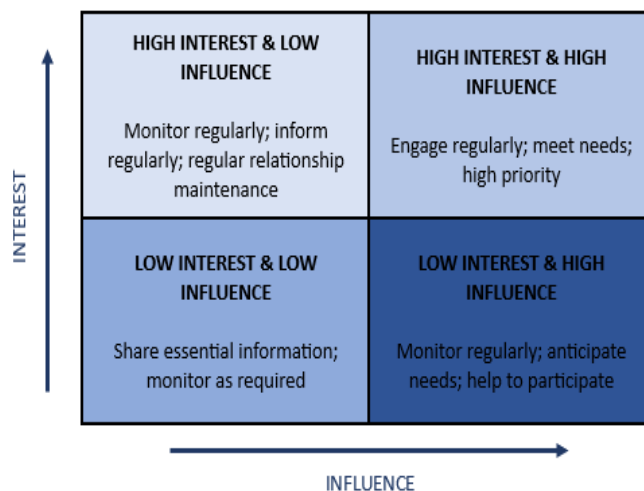
- IDENTIFY KEY STAKEHOLDERS & STAKEHOLDER ENGAGEMENT STRATEGIES – Engaging with key stakeholders fosters strong relationships and accesses firsthand insight into how PCNs may be strengthened in the community. Identify key stakeholders in the local Primary Care Network and the method(s) that will be used to engage each, as applicable, in the needs assessment. Stakeholder identification and engagement strategies will be discussed during Phase #1: Launch to support success (see City-wide Steering Committee Meeting Requirements for details).
- STAKEHOLDER CONSULTATION – Consult key stakeholders and gather feedback regarding PCN strengths and the needs/gaps/barriers to the success of PCNs in the community. Summarize findings using the template provided.
- UNDERTAKE ADDITIONAL NEEDS ASSESSMENT STRATEGIES – As applicable (not required), undertake additional needs assessment strategies to complement the information gathered through stakeholder engagement(s).
- SUBMIT STEP #1 REPORT OF OUTCOMES & SUPPORTING DOCUMENTATION – Submit the Report of Outcomes, Stakeholder Consultation: Summary of Findings and any other supporting documentation to the VDoFP for feedback/approval.

### TIPS FOR STAKEHOLDER ENGAGEMENT

- Stakeholder mapping may assist in identifying who and how the Steering Committee will engage with different groups of stakeholders during this step and throughout the initiative lifecycle.
- Not all stakeholders need to be actively consulted during an initiative, some may simply be kept informed.
- Stakeholder consultations may be done with all key stakeholders collectively, or different strategies may be used to engage different groups of key stakeholders.
- Suggested methods for engaging stakeholders include: community roundtables, focus groups, surveys, information sharing, etc.

### STAKEHOLDER MAPPING

Guidelines for discussion purposes only.



## STEP 1: REPORTING & TEMPLATES

---

Templates can be found in Appendix: STEP #1. Submit the following at the conclusion of Step #1 and no later than the date provided by the VDoFP.

---

REPORT OF OUTCOMES: NEEDS ASSESSMENT	<ul style="list-style-type: none"><li>• Use this template to report on the outcomes of Step #1 and share learnings.</li></ul>
STAKEHOLDER CONSULTATION: SUMMARY OF FINDINGS	<ul style="list-style-type: none"><li>• Use this template to capture key findings from stakeholder consultations.</li><li>• These findings will be used to inform the identification and selection of PCN the initiative.</li></ul>
[NEEDS ASSESSMENT E.G., OBSERVATIONAL STUDY]: SUMMARY OF FINDINGS – ONLY IF APPLICABLE	<ul style="list-style-type: none"><li>• If applicable, submit a summary of key findings from additional needs assessment strategies that were employed (strategies outside of stakeholder engagements).</li><li>• For example, if the Steering Committee completed an observational study or literature review, submit a summary report of findings.</li><li>• A template is not provided as the report format will vary based on the needs assessment methodology used.</li></ul>

---

## STEP 1: REPORT OF OUTCOMES QUESTIONS

---

Prior to commencing this step, review the questions that the Steering Committee is accountable for responding to. Keep these questions in mind as the step is undertaken.

1. What strategies were used to assess needs – uncover PCN strengths, needs/gaps/barriers to success and underlying challenges?
  2. What PCN strengths were identified that may be leveraged moving forward? Key strengths are typically considered those that are shared across multiple needs assessment strategies, multiple stakeholder groups and/or were definitive themes for high interest/influence stakeholders and/or key needs assessment strategies.
  3. What key needs/gaps/barriers to the success of PCNs were identified that should be addressed moving forward? Key needs/gaps/barriers are typically considered those that are shared across multiple needs assessment strategies, multiple stakeholder groups and/or were definitive themes for high interest/influence stakeholders and/or key needs assessment strategies.
  4. What communication strategies did you use to engage with stakeholders? Which strategies were the most effective and should be used again?
  5. Were there barriers to certain stakeholder populations participating in the needs assessment? If so, what steps were taken to overcome these?
  6. In completing Step #1: Assess Needs, what key learnings will the PCN Steering Committee apply moving forward?
-



---

## PCN INITIATIVE LIFECYCLE: STEP #2

---

2



### BRAINSTORM

- Review findings from Step #1
  - Brainstorm potential initiatives and identify the idea that will be pursued
  - Define the initiative in broad terms and confirm preliminary feasibility
- 

### STEP 1: KEY ACTIVITIES

---

- BRAINSTORM – Based on feedback and insights from Step #1, brainstorm potential initiatives for each of the eight PCN core attributes. Based on need, potential impact and feasibility, narrow these ideas down until one idea is selected to pursue.
  - DEFINE THE INITIATIVE – In broad terms, outline the initiative as a committee. Use the key questions in the Report of Outcomes for this step as a guide.
  - DETERMINE FEASIBILITY – Based on the broad approach envisioned, determine if the initiative is likely to be feasible given timing, human resource capacity, budget, etc. If there are concerns, the PCN Steering Committee and the Committee Consultant will work together to determine if the concerns can be resolved or if a narrower scope, or an alternate approach or initiative should be selected.
  - SUBMIT STEP #2 REPORT OF OUTCOMES & SUPPORTING DOCUMENTATION – Submit the Report of Outcomes and Brainstorm Capture to the VDoFP for feedback/approval.
- 

### STEP 2: REPORTING & TEMPLATES

---

Templates can be found in Appendix: STEP #2. Submit the following at the conclusion of Step #2 and no later than the date provided by the VDoFP.

---

REPORT OF OUTCOMES:  
INITIATIVE OVERVIEW

- Use this template to report on the outcomes of Step #2 and share learnings.

---

BRAINSTORM CAPTURE

- Use this template to capture potential initiatives for each of the eight PCN core attributes.
  - These ideas may be used as a starting point when identifying future initiatives.
-

## STEP 2: REPORT OF OUTCOMES QUESTIONS

---

Prior to commencing this step, review the questions that the Steering Committee is accountable for responding to. Keep these questions in mind as the step is undertaken.

---

1. What is the name of the initiative?

---
2. Which of the PCN core attributes does the initiative support/align to?

---
3. What is the purpose of the initiative?

---
4. What need/gap/barrier to the success of PCNs does the initiative address?

---
5. What are the expected outcomes if the initiative is successful? What will the impact be?

---
6. What final deliverable(s) will be provided to the Vancouver Division of Family Practice (e.g., survey structure, report of findings, etc.)?

---
7. In broad terms, what key tactic(s) will be used to achieve the purpose (e.g., survey, community consultation, technology testing and review, etc.)?

---
8. Are there others that share this agenda that will be engaged as partners in the initiative? Are they interested in participating/contributing?

---
9. Who are the key stakeholders? How will you engage them over the course of the initiative?

---
10. Based on preliminary ideas regarding the initiative, is the initiative feasible? Are there any concerns to flag at this time (consider timing, human resource capacity, budget, etc.)?

---
11. In completing Step #2: Brainstorm, what key learnings will the PCN Steering Committee apply moving forward?

---

## PCN INITIATIVE LIFECYCLE: STEP #3

3



PLAN

- Create a project plan – a clear roadmap for the initiative
- Create a budget to support the project plan
- Create a risk management plan
- Secure resources and finalize plans

### STEP 3: KEY ACTIVITIES

- DRAFT THE PROJECT PLAN – The project plan defines the initiative, provides a roadmap for execution, ensures the committee has the resources for success, tracks progress, and supports accountability for results. Drafting the plan is really about addressing four key questions: What are we going to do? How are we going to do it? When are we going to do it? How will we close the initiative? Use the simple project plan template as a starting point.
- DRAFT THE BUDGET – The budget estimates costs against the project plan, allows costs to be tracked and supports accountability for allocated funding. Use the simple budget template as a starting point.
- DRAFT THE RISK MANAGEMENT PLAN – The risk management plan identifies and prioritizes risks, determines how potential risks will be monitored, and outlines mitigation strategies and/or contingency plans should they be needed. Use the risk management plan template to ensure the initiative is ready to respond to potential risks.
- SECURE RESOURCES & AMMEND PLANS AS NECESSARY – Based on the plan and budget drafted, take steps to secure the resources necessary for successful execution. If any required resources are not accessible, adjust plans/budget as necessary to create a realistic plan for success. The Steering Committee may seek additional resources (e.g., through potential partners, resource sharing, gifts in-kind, etc.) and/or make adjustments (e.g., shift approaches/tactics, adjust scope, reallocate resources or revamp goals) to create a plan and budget that is realistic and achievable.
- SUBMIT STEP #3 REPORT OF OUTCOMES & SUPPORTING DOCUMENTATION – Submit the Report of Outcomes, and the completed Project Plan, Budget and Risk Management Plan to the VDoFP for feedback/approval.

#### TIPS FOR PRIORITIZING RISKS

- Draw the matrix on a whiteboard/flip chart.
- Brainstorm risks and their impacts; write each on a post-it.
- Place each on the matrix.
- Review the matrix once all risks are posted; move risks as needed to support consistent prioritization.
- Complete the risk management plan (see Appendix: Step #3) – plan for extreme and high risks at minimum.

RISK PRIORITIZATION MATRIX

		RISK PRIORITIZATION MATRIX			
LIKELIHOOD	CERTAIN	LOW RISK	MODERATE RISK	HIGH RISK	EXTREME RISK
	MODERATE	LOW RISK	MODERATE RISK	HIGH RISK	HIGH RISK
	REMOTE	LOW RISK	LOW RISK	MODERATE RISK	MODERATE RISK
		ACCEPTABLE		INTOLERABLE	
		IMPACT			

### STEP 3: REPORTING & TEMPLATES

---

Templates can be found in Appendix: STEP #3. Submit the following at the conclusion of Step #3 and no later than the date provided by the VDoFP.

---

REPORT OF OUTCOMES: PLANNING OVERVIEW	<ul style="list-style-type: none"><li>• Use this template to report on the outcomes of Step #3 and share learnings.</li></ul>
PROJECT PLAN	<ul style="list-style-type: none"><li>• Use this template to build a plan to execute and track the progress of the initiative.</li><li>• As applicable, customize the template to best align to the initiative.</li><li>• This is a “living document”; update progress and make adjustments over the course of the initiative.</li></ul>
BUDGET	<ul style="list-style-type: none"><li>• Use this template to budget and track costs.</li><li>• As applicable, customize the template to best align to the initiative.</li><li>• This is a “living document”; update progress and make adjustments as needed.</li></ul>
RISK MANAGEMENT PLAN	<ul style="list-style-type: none"><li>• Use this template to outline plans to monitor risks, and to mitigate risks and/or identify contingency plans.</li></ul>

---

### STEP 3: REPORT OF OUTCOMES QUESTIONS

---

Prior to commencing this step, review the questions that the Steering Committee is accountable for responding to. Keep these questions in mind as the step is undertaken.

1. Does the Steering Committee feel confident in their ability to execute on the plan/budget? Are there any key aspects of the plan/budget that the Steering Committee would like feedback on/support with?
  2. Once detailed planning began, were their sufficient resources to deliver the initiative as it was originally conceptualized during Step #2? If not, how have the needed resources been obtained or how has the initiative shifted or changed to match available resources?
  3. How did the Steering Committee involve key stakeholders in the design of the initiative? Are they supportive of the approach/strategies that have been chosen?
  4. What PCN strengths does the initiative leverage/build on with the approaches outlined in the project plan?
  5. How will progress be tracked against the project plan? What steps will be taken if actions are deviating from the plan?
  6. How will progress be tracked against the budget? What steps will be taken if the budget is at risk?
  7. Will this initiative continue on following Step #5: Close & Share? If so, how?
  8. In completing Step #3: Plan, what key learnings will the PCN Steering Committee apply moving forward?
-

# PCN INITIATIVE LIFECYCLE: STEP #4

4



**ACT & MONITOR**

- Turn the project plan into action
- Monitor for risks, track progress against the plan and costs against the budget
- Proactively identify and remove/mitigate barriers to success
- Address unforeseen obstacles in a timely and planful manner
- Be nimble and open to shifting direction if the landscape changes to ensure the initiative remains relevant

## STEP 4: KEY ACTIVITIES

- ❑ EXECUTE ON THE PROJECT PLAN – The project plan is a roadmap for the initiative’s success. Deploy resources and move through the steps outlined in the plan. Continue to monitor for risks as per the risk management plan along the way.
- ❑ TRACK & COMMUNICATE PROGRESS – On a monthly basis and as is logical and/or required, track and communicate progress against both the project plan and the budget.
- ❑ ADDRESS CHALLENGES & BE FLEXIBLE – Should tracking reveal the initiative is at risk or off track, the PCN Steering Committee and the Committee Consultant will work together to address challenges. If such circumstances arise, use the risk management plan (as applicable), be planful, and remain flexible – for example, be open to reallocating resources to achieve the initiative’s goals and/or to shifting direction to ensure the initiative remains relevant.
- ❑ SUBMIT STEP #4 REPORT OF OUTCOMES: PROGRESS REPORTS & SUPPORTING DOCUMENTATION – Submit the Report of Outcomes: Progress Reports, and the Project Plan and Budget with updated tracking to the VDoFP for feedback/approval at two designated points during Step #4.

### COMMUNICATION TIPS FOR STEP #4

Ongoing progress should be communicated to a variety of audiences and feedback and insights should be sought as appropriate.

Tracking and communicating progress, and ensuring two-way communication lines are open, helps to ensure the success of the initiative.

Communicating progress regularly:

- Strengthens and grows relationships and supports ongoing buy-in;
- Allows feedback to be received, potential obstacles to be identified and synergies to be uncovered;
- Supports key milestones to be recognized and celebrated; and
- Ensures accountability for results.

### STEP #4: COMMUNICATION GUIDELINES

PCN Steering Committee	<ul style="list-style-type: none"> <li>• Share and discuss progress updates a minimum of once per month</li> <li>• Discussion does not have to be through in person meetings – virtual meetings, online discussion, etc. may be used</li> </ul>
PCN Steering Committee Consultant	<ul style="list-style-type: none"> <li>• Share and discuss progress updates a minimum of once per month or as per the schedule created for the Steering Committee</li> </ul>
Initiative Partners (if applicable)	<ul style="list-style-type: none"> <li>• Share and discuss progress updates a minimum of once per month or as per the schedule created for the Steering Committee</li> </ul>
VDoFP Board	<ul style="list-style-type: none"> <li>• Twice during Step #4; at approximately 1/3 and 2/3 of the way through the execution of the initiative</li> <li>• The Board may request more frequent updates if the initiative is off track or at risk of going off track and/or to comply with their own reporting requirements</li> </ul>
Stakeholders	<ul style="list-style-type: none"> <li>• There are a wide range of stakeholders for any initiative and when and how they should be communicated with varies (e.g., while some should simply be kept informed, others should be actively engaged in ongoing dialogue)</li> <li>• Stakeholder mapping (see Step #2) can be used to help determine the frequency and level of communication while the initiative is underway</li> </ul>

## STEP 4: REPORTING & TEMPLATES

---

Reporting for Step #4 is different than other steps in the initiative lifecycle. During this step, progress reports and supporting documentation will be submitted at approximately one third and two thirds of the way through the step/execution of the initiative. The intent is to showcase progress, recognize successes and to allow potential challenges to be flagged and/or interventions to be discussed if an initiative is at risk or off track. Submit the following on the dates provided by the VDoFP.

---

- |  |   |
|--|---|
| REPORT OF OUTCOMES:<br>PROGRESS REPORT | <ul style="list-style-type: none"><li>• Use this template to report on the progress of Step #4 and share learnings.</li><li>• The progress report will be submitted twice during Step #4.</li></ul> |
|--|---|
- 

- |                          |  |
|--------------------------|--|
| PROJECT PLAN &<br>BUDGET | <ul style="list-style-type: none"><li>• Use the Project Plan and Budget created during Step #3 to track progress and make adjustments over the course of the initiative as required.</li><li>• These updated documents will be submitted with the Report of Outcomes: Progress Report.</li></ul> |
|--------------------------|--|
- 

## STEP 4: REPORT OF OUTCOMES QUESTIONS

---

Prior to commencing this step, review the questions that the Steering Committee is accountable for responding to. Keep these questions in mind as the step is undertaken.

---

1. Briefly summarize progress to date against the initiative's goals and the quality of work/outcomes.
  2. Overall, is the initiative on track with respect to progress against in the project plan? If the initiative is not on track, detail the plan for getting the initiative back on track.
  3. Overall, how is the initiative tracking against the budget? If the initiative is not on track, detail the plan for getting the initiative back on track.
  4. Do the initiative's goals and plan still make sense in light of the progress made and current landscape? If goals and/or plans need to shift or change, how will the Steering Committee proceed?
  5. Have challenges or obstacles been encountered? If so, how have they been addressed/overcome?
  6. Who needs to know about the initiative's progress? What methods have been used to share progress updates with key stakeholders?
  7. How has the PCN Steering Committee acknowledged and celebrated the learning that has happened and the progress that has occurred to date?
  8. In working toward the completion of Step #4: Act & Monitor, what key learnings will the PCN Steering Committee apply going forward?
-



---

## PCN INITIATIVE LIFECYCLE: STEP #5

---

5



CLOSE &  
SHARE

- Conclude all project activities
  - Submit final deliverables and release any unused resources to the VDoFP
  - If applicable, turn the finished product or ongoing initiative over to its new owners
  - Document and share results and learnings
- 

### STEP 5: KEY ACTIVITIES

---

- CONCLUDE PROJECT ACTIVITIES – Ensure that all aspects of the project are completed with no loose ends and resources (used and remaining) are accounted for.
  - SUBMIT DELIVERABLES & RELEASE RESOURCES – Submit deliverables as outlined in the project plan, and release any remaining/unused resources (e.g., remaining budget) to the VDoFP.
  - TRANSITION OWNERSHIP (IF APPLICABLE) – This activity may or may not apply depending on the initiative. If applicable, turn the finished product or ongoing initiative over to its new owners.
  - INITIATIVE REFLECTION MEETING – Conduct a final analysis of the project, taking into account lessons learned to foster continuous improvement and enhance overall productivity of the PCN Steering Committees going forward. The Step #5: Report of Outcomes can serve as an outline for the meeting.
  - SUBMIT STEP #5 REPORT OF OUTCOMES – Submit the Report of Outcomes and Impact Report to the VDoFP for feedback/approval.
- 

### STEP 5: REPORTING & TEMPLATES

---

Templates can be found in Appendix: STEP #5. Submit the following at the conclusion of Step #5 and no later than the date provided by the VDoFP.

---

REPORT OF

OUTCOMES: RESULTS  
& LEARNINGS

- Use this template to report on the outcomes of Step #5 and share learnings.
- 

IMPACT REPORT

- While there is not a template, as the format will vary depending on the nature of the initiative, a brief report should be compiled that highlights a series of metrics and/or observations that showcase how the initiative made, or will make, a difference to PCN success.
  - The report can be used to communicate impacts to stakeholders.
-

## STEP 5: REPORT OF OUTCOMES QUESTIONS

---

Prior to commencing this step, review the questions that the Steering Committee is accountable for responding to. Keep these questions in mind as the step is undertaken.

---

1. How did the initiative perform against the goals set out in the project plan?

---

2. What are, or will be, the impact of the initiative's results?

---

3. How have, or how will, the results and outcomes of the initiative be shared with key stakeholders?

---

4. Will this initiative continue? If so, what recommendations does the Steering Committee have for sustained success?

---

5. What deliverables have been submitted to the VDoFP? How would the Steering Committee recommend these be used going forward?

---

6. Overall, what went well over the course of the initiative's lifecycle?

---

7. Overall, what was challenging? What could have been done differently to overcome or mitigate these challenges?

---

8. How have, or how will, the PCN Steering Committee acknowledge and celebrate the initiative's close and the learning that has happened?

---

9. What key recommendations does this Steering Committee have for other PCN Steering Committees embarking on initiatives with the same or similar goals?

---

10. Consider the initiative lifecycle overall. What are five to ten key learnings that all PCN Steering Committees should apply to their next initiative? Consider stakeholder management, project planning and tracking, etc.

---

---

# APPENDICES

---

TEMPLATES TO SUPPORT STEPS #1 THROUGH #5 OF PCN INITIATIVES

---

# APPENDIX: STEP #1

## ASSESS NEEDS

---

The following documentation should be submitted to the VDoFP for feedback and approval at the end of Step #1 and by the completion date set out by the Division.

---

- Report of Outcomes: Needs Assessment (template provided)
  - Stakeholder Consultation: Summary of Findings (template provided)
  - Needs Assessment (e.g., Literature Review): Summary of Findings (template not provided; submit a summary of key findings from additional needs assessment strategies that were employed - strategies outside of stakeholder engagements - if applicable)
-

# STEP #1: REPORT OF OUTCOMES: NEEDS ASSESSMENT

1



## ASSESS NEEDS

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

Keep the content of answers brief and succinct, using a maximum of 10 bullets per question.

<p>1. What strategies were used to assess needs – uncover PCN strengths, needs/gaps/barriers to success and underlying challenges?</p>	
<p>2. What PCN strengths were identified that may be leveraged moving forward? Key strengths are typically considered those that are shared across multiple needs assessment strategies, multiple stakeholder groups and/or were definitive themes for high interest/influence stakeholders and/or key needs assessment strategies.</p>	
<p>3. What key needs/gaps/barriers to the success of PCNs were identified that should be addressed moving forward?</p>	
<p>4. What communication strategies did you use to engage with stakeholders? Which strategies were the most effective and should be used again?</p>	
<p>5. Were there barriers to certain stakeholder populations participating in the needs assessment? If so, what steps were taken to overcome these?</p>	
<p>6. In completing Step #1: Assess Needs, what key learnings will the PCN Steering Committee apply moving forward?</p>	

## STEP #1: STAKEHOLDER CONSULTATION: SUMMARY OF FINDINGS

1



### ASSESS NEEDS

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

The following summarizes findings from stakeholder consultations. Keep the content of answers brief and succinct. Add additional stakeholder rows as needed.

STAKEHOLDER GROUP	ENGAGEMENT STRATEGY(S)	# OF PARTICIPANTS	SUMMARY OF RESULTS
			STRENGTHS: ..... NEEDS/GAPS/BARRIERS & UNDERLYING CAUSE(S):
			STRENGTHS: ..... NEEDS/GAPS/BARRIERS & UNDERLYING CAUSE(S):
			STRENGTHS: ..... NEEDS/GAPS/BARRIERS & UNDERLYING CAUSE(S):
			STRENGTHS: ..... NEEDS/GAPS/BARRIERS & UNDERLYING CAUSE(S):
			STRENGTHS: ..... NEEDS/GAPS/BARRIERS & UNDERLYING CAUSE(S):



# APPENDIX: STEP #2

## BRAINSTORM

---

The following documentation should be submitted to the VDoFP for feedback and approval at the end of Step #2 and by the completion date set out by the Division.

---

- Report of Outcomes: Initiative Overview (template provided)
  - Brainstorm Capture (template provided)
-

## STEP #2: REPORT OF OUTCOMES: INITIATIVE OVERVIEW

2



**BRAINSTORM**

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

Keep the content of answers brief and succinct, using a maximum of 10 bullets per question.

1. What is the name of the initiative?	
2. Which of the PCN core attributes does the initiative support/align to?	
3. What is the purpose of the initiative?	
4. What need/gap/barrier to the success of PCNs does the initiative address?	
5. What are the expected outcomes if the initiative is successful? What will the impact be?	
6. What final deliverable(s) will be provided to the Vancouver Division of Family Practice (e.g., survey structure, report of findings, etc.)?	
7. In broad terms, what key tactic(s) will be used to achieve the purpose (e.g., survey, community consultation, technology testing and review, etc.)?	
8. Are there others that share this agenda that will be engaged as partners in the initiative? Are they interested in participating/contributing?	
9. Who are the key stakeholders? How will you engage them over the course of the initiative?	

<p>10. Based on preliminary ideas regarding the initiative, is the initiative feasible? Are there any concerns to flag at this time (consider timing, human resource capacity, budget, etc.)?</p>	<p>Can the initiative be completed in 12-months? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is there human resource capacity to execute? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is there sufficient budget? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Notes/Caveats/Concerns:</p>
<p>11. In completing Step #2: Brainstorm, what key learnings will the PCN Steering Committee apply moving forward?</p>	

## STEP #2: BRAINSTORM CAPTURE

2



### BRAINSTORM

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

The following summarizes potential initiatives brainstormed by the PCN Steering Committee based on the feedback gathered from the needs assessment. This document may be used to inform the selection of future initiatives.

PCN CORE ATTRIBUTES	POTENTIAL PCN STEERING COMMITTEE INITIATIVES
1. Access and attachment to quality primary care	
2. Extended hours	
3. Same day access to urgent care	
4. Advice and information	
5. Comprehensive primary care	
6. Culturally safe care	
7. Coordinated care	
8. Clear communication	

# APPENDIX: STEP #3

## PLAN

---

The following documentation should be submitted to the VDoFP for feedback and approval at the end of Step #3 and by the completion date set out by the Division.

---

- Report of Outcomes: Planning Overview (template provided)
  - Project Plan (template provided)
  - Budget (template provided)
  - Risk Management Plan (template provided)
-

## STEP #3: REPORT OF OUTCOMES: PLANNING OVERVIEW

3



PLAN

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

Keep the content of answers brief and succinct, using a maximum of 10 bullets per question.

<p>1. Does the Steering Committee feel confident in their ability to execute on the plan/budget? Are there any key aspects of the plan/budget that the Steering Committee would like feedback on/support with?</p>	
<p>2. Once detailed planning began, were their sufficient resources to deliver the initiative as it was originally conceptualized during Step #2? If not, how have the needed resources been obtained or how has the initiative shifted or changed to match available resources?</p>	
<p>3. How did the Steering Committee involve key stakeholders in the design of the initiative? Are they supportive of the approach/strategies that have been chosen?</p>	
<p>4. What PCN strengths does the initiative leverage/build on with the approaches outlined in the project plan?</p>	
<p>5. How will progress be tracked against the project plan? What steps will be taken if actions are deviating from the plan?</p>	



6. How will progress be tracked against the budget? What steps will be taken if the budget is at risk?	
7. Will this initiative continue on following Step #5: Close & Share? If so, how?	
8. In completing Step #3: Plan, what key learnings will the PCN Steering Committee apply moving forward?	

## STEP #3: PROJECT PLAN

3



PLAN

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

DATE LAST UPDATED: MM/DD/YYYY

The Report of Outcomes: Initiative Overview from Step #2 will inform the design of the project plan. Add rows to the plan as required to accommodate required activities/tasks. Further customize this template as required to best suit the initiative. Keep the content of this plan brief and succinct.

<b>INITIATIVE NAME:</b>		<b>PCN CORE ATTRIBUTE:</b>	
<b>INITIATIVE GOALS (max of 3):</b>		<b>TARGETS FOR SUCCESS (what will be achieved/impact if successful):</b>	
<b>KEY RESOURCES REQUIRED (e.g., access to survey software, etc.):</b>		<b>DELIVERABLES TO THE VDoFP (e.g., survey structure, report of findings, etc.):</b>	

<b>INITIATIVE START DATE:</b> MM/DD/YYYY	<b>INITIATIVE END DATE:</b> MM/DD/YYYY	<b>OVERALL PROGRESS TO DATE (% complete &amp; status):</b>	
--	--	--	--

When identifying activities/tasks consider: training needs, key communications, stakeholder engagements, quality assurance measures, milestones to celebrate, project closure, etc.

ACTIVITY/TASK	RESPONSIBLE	START DATE	END DATE	PROGRESS COMPLETE (%)	STATUS (on track, at risk of off track, off track)	COMMENTS (if applicable)

## STEP #3: BUDGET

3



PLAN

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

DATE LAST UPDATED: MM/DD/YYYY

The Project Plan will inform the budget. Add columns and/or rows to the budget as required to accommodate required activities/tasks. Further customize this template as required to best suit the initiative. Keep the content of this plan brief and succinct. Total available dollars must not be exceeded. The PCN Steering Committee is not required to use the total available dollars for the initiative.

<b>INITIATIVE NAME:</b>	
-------------------------	--

### BUDGET AVAILABLE

<b>TOTAL \$ AVAILABLE FOR INITIATIVE:</b>	\$	<b>DOLLARS PROVIDED BY VDoFP:</b>		<b>DOLLARS FROM OTHER SOURCES (Source, \$ if applicable):</b>	
---	----	-----------------------------------	--	---	--

### BUDGET SUMMARY

<b>TOTAL INITIATIVE BUDGET:</b>	\$	<b>ACTUAL:</b>	\$	<b>UNDER (OVER):</b>	\$
---------------------------------	----	----------------	----	----------------------	----

ACTIVITY/TASK <small>ALIGN TO PROJECT PLAN; ADD/ REMOVE DETAILS AS RELEVANT</small>	HR		MEETING EXPENSES				COMMUNICATIONS	MISC.		BUDGET TRACKING		
	COMMITTEE CONSULTANT	COMMITTEE MEMBERS	STAKEHOLDER SESSIONAL FEES	ROOM RENTAL	CATERING	SUPPLIES		BUDGET	ACTUAL	UNDER (OVER)		

**NOTES:** Use this area to capture key notes that inform the budget. For example, the current Sessional Rate, changes to rates, etc.

## STEP #3: RISK MANAGEMENT PLAN

3



PLAN

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

The risk management plan identifies key risks, determines how these potential risks will be monitored, and outlines mitigation strategies and/or contingency plans should they be needed. A risk prioritization matrix can support identifying key risks (see Step #3). After key risks have been identified, use the table below to outline those risks that the PCN Steering Committee will actively monitor and plan for.

RISK MANAGEMENT PLAN			
RISK	POTENTIAL IMPACTS	TACTICS TO MONITOR THE RISK	MITIGATION &/OR CONTINGENCY PLAN

# APPENDIX: STEP #4

## ACT & MONITOR

---

Reporting for Step #4 is different than for other steps in the initiative lifecycle. During this step, progress reports and supporting documentation will be submitted at approximately one third and two thirds of the way through the step/execution of the initiative. The intent is to showcase progress, recognize successes and to allow potential challenges to be flagged and/or interventions to be discussed if an initiative is at risk or off track. Submit the following to the VDoFP for feedback and approval as per the dates provided by the Division.

---

- Report of Outcomes: Progress Report (template provided)
  - Updated Project Plan (project plan created during Step #3)
  - Updated Budget (project plan created during Step #3)
-

## STEP #4: REPORT OF OUTCOMES: PROGRESS REPORT

4



**ACT &  
MONITOR**

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

Keep the content of answers brief and succinct, using a maximum of 10 bullets per question.

<p>1. Briefly summarize progress to date against the initiative’s goals and the quality of work/outcomes.</p>	
<p>2. Overall, is the initiative on track with respect to progress against in the project plan? If the initiative is not on track, detail the plan for getting the initiative back on track.</p>	
<p>3. Overall, how is the initiative tracking against the budget? If the initiative is not on track, detail the plan for getting the initiative back on track.</p>	
<p>4. Do the initiative’s goals and plan still make sense in light of the progress made and current landscape? If goals and/or plans need to shift or change, how will the Steering Committee proceed?</p>	
<p>5. Have challenges or obstacles been encountered? If so, how have they been addressed/overcome?</p>	
<p>6. Who needs to know about the initiative’s progress? What methods have been used to share progress updates with key stakeholders?</p>	
<p>7. How has the PCN Steering Committee acknowledged and celebrated the learning that has happened and the progress that has occurred to date?</p>	
<p>8. In working toward the completion of Step #4: Act &amp; Monitor, what key learnings will the PCN Steering Committee apply going forward?</p>	

# APPENDIX: STEP #5

## CLOSE & SHARE

---

The following documentation should be submitted to the VDoFP for feedback and approval at the end of Step #5 and by the completion date set out by the Division.

---

- Report of Outcomes: Results & Learnings (template provided)
  - Impact Report (template not provided; customize the report format to suit the initiative)
-

## STEP #5: REPORT OF OUTCOMES: RESULTS & LEARNINGS

5



**CLOSE &  
SHARE**

PCN STEERING COMMITTEE: Insert community

COMMITTEE CONVENER: Name, title

COMMITTEE CONSULTANT: Name, title

DATE SUBMITTED: MM/DD/YYYY

Keep the content of answers brief and succinct, using a maximum of 10 bullets per question.

1. How did the initiative perform against the goals set out in the project plan?	
2. What are, or will be, the impact of the initiative's results?	
3. How have, or how will, the results and outcomes of the initiative be shared with key stakeholders?	
4. Will this initiative continue? If so, what recommendations does the Steering Committee have for sustained success?	
5. What deliverables have been submitted to the VDoFP? How would the Steering Committee recommend these be used going forward?	
6. Overall, what went well over the course of the initiative's lifecycle?	
7. Overall, what was challenging? What could have been done differently to overcome or mitigate these challenges?	
8. How have, or how will, the PCN Steering Committee acknowledge and celebrate the initiative's close and the learning that has happened?	



<p>9. What key recommendations does this Steering Committee have for other PCN Steering Committees embarking on initiatives with the same or similar goals?</p>	
<p>10. Consider the initiative lifecycle overall. What are five to ten key learnings that all PCN Steering Committees should apply to their next initiative? Consider stakeholder management, project planning and tracking, etc.</p>	