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Health Services Integration Fund

What Makes a Good Project?

Canada 

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Foreword

The Health Services Integration Fund (HSIF) is a five year (2010/2011 – 2014/2015), \$80 million initiative supporting collaborative planning and multi-year projects aimed at better meeting the health needs of First Nations, Inuit and Métis. HSIF builds on the lessons learned and partnerships established among First Nations, Inuit, Métis, provincial, territorial and federal representatives through HSIF's predecessor initiative, the Aboriginal Health Transition Fund (AHTF).

A number of lessons were learned during the AHTF's existence. Among those lessons were:

- ***New ways of collaborating***: broader partner engagement; broader community involvement
- ***New ways of understanding***: new understanding of each jurisdiction's health systems, health priorities and potential areas to integrate/adapt to better meet Aboriginal health care needs.
- ***New ways of doing business***: collaborative approach between governments and Aboriginal organizations in health planning, service delivery (i.e., service agreements, MOUs, formal FN/I board participation).

From the practical side, one of the biggest lessons learned from the community perspective has been the need to develop a project proposal. This plan should include specific timelines, risk assessment, readiness assessment, project sponsor identification and clarity on their role: project framework, interim reporting mechanisms: scope management. There should be clarity on structure, mandate and engage the appropriate players in that discussion for their expertise and to secure and maintain buy-in.

In addition, project leaders must ensure that they utilise the team and their talent to the maximum and hire or contract additional expertise as required. A project leader should implement the project based on a team approach and not rely too heavily on their own individual efforts. As the project launches, the project leader must ensure clarity; which can be sought with input and support from the funders. Partnerships need dedicated time to develop and maintain.

Do not underestimate the amount of time required to communicate, discuss issues and resolve differences. Allow more time than you think will be needed to nurture these relationships. Allow for time for briefing up and perhaps revising roles and purpose in the event of changes in leadership and personnel.

Further, it is important to reinforce traditional language and culture. Focus on community strengths such as mutual support, elders and traditional ways. Where possible include elders on an advisory committee. For projects on service delivery, an effective multi-disciplinary, holistic approach uses family support,

elders, spiritual guidance, nurse, doctors, counsellors, NNADAP staff, and mental health professionals. Lastly, small steps are better than big steps. Successful projects often have clear objectives which focus on two or three main activities.

Section 1 – What Makes A Good Project

In determining what will make a project successful, the absence of any of these elements could indicate that a project has not been well planned out and may not be an appropriate project to fund.

- **Consider having a Dedicated project coordinator**
 - It is difficult for a Health Director to do an additional project off the side of their desk.

- **Partnerships**
 - Clear roles/responsibilities for project partners. A good project knows what is expected and what each partner can and will contribute.
 - In some instances, expectations can be clarified through strong letters of support that outline roles and responsibilities.
 - Consider ways to manage staff turnover.

- **Proper Project Management**
 - Have a proper system for projects files (with backups)
 - Clear understanding of contribution agreement requirements—reporting, expenditure management, budgeting,
 - Record decisions made at meetings.
 - Use of project management software (where appropriate)
 - Include any needed training:
 - Project management
 - Governance/Negotiation (if applicable to the study)

- **Realistic Timelines**
 - Start dates should reflect internal/external approval processes
 - Time to hire appropriate personnel
 - Engage partners/stakeholders
 - Expect the unexpected

- **Milestones**
 - Sequencing of events. Is the achievement of X needed before Y?
 - How will you keep a project on track?
 - Do results depend on external parties?

- **Appropriate Budgets**
 - What can be realistically spent/achieved in a given year?
 - Appropriate evaluation budget is 1 to 5% for an external evaluator.

- **Regular Communication with community/partners**
 - Buy in from the community is often needed. By keeping them informed—a project can run smoothly.

- **Sustainability**
 - How can relationships be cultivated and sustained?
 - What will be the legacy of your project?

- **Evaluation**
 - Plan for your evaluation at the start of the project by implementing a performance measurement plan which will ensure that needed data is collected through out the life of the project and is available for independent evaluation at the end
 - What will you use to define the success of project?
 - What is the situation before the start of the project?
 - What is the situation after?
 - What can be attributed to your project?
 - What is an appropriate budget to evaluate my project? Is a pre/post survey needed? How much do external evaluators cost? Will it involve travel?
 - How do I ensure that an evaluator will have what they need (see above, re: project management)

Section 2 – Criteria to Assess Project Proposals

The following extract from Section 5.5 of the HSIF Implementation Guide is the specific assessment criteria to be used by the Provincial / Territorial Advisory Committee in reaching a recommendation to provide funding or not to a project.

Project proposals will be assessed against the following criteria:

- ✓ projects must meet the objectives and priorities identified by the Provincial / Territorial Advisory Committee's Integration Plan
- ✓ projects must advance, sustain and promote integration regionally to meet the needs of First Nations/Inuit.
- ✓ projects / initiatives are broad in scope (e.g., aggregation of smaller communities to integrate services within a province/territory and/or that involves a range of partners and health services)
- ✓ identification of the recipient of funding
- ✓ project must submit a work plan that includes timelines, milestones and deliverables
- ✓ inclusion of an overall budget with identification of in kind support
- ✓ budget that corresponds to proposed activities identified and can be carried out within appropriate timelines
- ✓ projects seek transitional funding and are not creating new services
- ✓ demonstrated capacity to carry out the proposed project
- ✓ evidence that projects support sustainable results that will advance integration
- ✓ letters of support from project partners
- ✓ if project recipient had received AHTF funding: the recipient must have completed and submitted their evaluation and the project proposal must demonstrate that the project will build upon previous work to advance integration and not sustain past work
- ✓ recipients must be eligible to receive funding under HSIF and ensure the requisite capacity to perform the proposed work
- ✓ projects that prompt external support (i.e., other departments, non-governmental, etc.), where applicable
- ✓ project includes consideration of communication, sustainability plan
- ✓ describes how the evaluation plan includes methodology for monitoring and evaluation with measurable targets

Section 3 – Project Assessment Template

Health Services Integration Fund Project Proposal Assessment	Title:	Region:
	Recipient:	Start Date:
	Submission Date:	End Date:
	Date Reviewed:	File #:
	Reviewed By:	Total \$:
Project Summary: Problem Statement: Overall Goal(s): Partners: Objectives:	Overall project strengths: Potential areas to strengthen:	

Criteria to Assess HSIF Project Proposals

Criteria	Met	Not Met	Notes
Project must meet the objectives and priorities identified by the Provincial / Territorial Advisory Committee's Integration Plan			
Project must advance, sustain and promote integration regionally to meet the needs of First Nations/Inuit			
Project must be broad in scope (e.g. aggregation of smaller communities to integrate services within a P/T and/or that involves a range of partners and health services)			
Recipient of funding identified			
Project must submit a work plan that includes timelines, milestones and deliverables			

Criteria	Met	Not Met	Notes
An overall budget is included with the identification of in-kind support			
Budget corresponds to proposed activities identified and can be carried out within appropriate timelines			
Project seeks transitional funding and is not creating new services			
There is a demonstrated capacity to carry out the proposed project			
Evidence that the project supports sustainable results that will advance integration			
Letters of support from partners included			
If the project recipient has received AHTF funding: the recipient must have completed and submitted their evaluation and the project proposal must demonstrate that the project will build on previous work to advance integration and not merely sustain past work			
Recipients must be eligible to receive funding under HSIF (evidence of requisite capacity to perform proposed work			
Project supports external support (i.e., other departments, non-governmental, etc) where applicable			
Project has an evaluation plan (or describes how the evaluation plan will be developed – including methodology, monitoring, and evaluation with measurable targets)			

Section 4 – Project Proposals (Sample Template)

The following can be used by eligible recipients to develop projects that are consistent with a province / territory's Integration Plan.

Section A: General Information

1) Project Title:

State the title or name of the project. This title should be a short summary of what the proposal is about.

2) Recipient:

Name of Organization: (Legal Name)
Address:
Contact Name:
Title:
Telephone:
Fax:
Email:

3) Project Partners:

Identify the partner(s) to the project. Letter(s) of support from each partner must be attached to the proposal. Please note that integration initiatives and projects must involve a First Nations/Inuit organization and a provincial/territorial government (or RHA/DHA/LIHN), and must be supported by the HSIF Advisory Committee.

4) Amount requested:

Funding Requested from HSIF:
Other Funding Sources and Amounts:
Total Project Cost:

5) Duration of Project:

Identify the proposed start and end date of the project. Please keep in mind that the start date will depend on the formal acceptance of the proposal and the timing of the signing of the contribution agreement (which can take up to 6-8 weeks following approval).

6) Overall Objective(s) of the Project:

Provide a clear and concise statement of objective(s) for the project. This must be in line with the objectives and criteria of HSIF and the Provincial / Territorial Advisory Committee Integration Plan.

Section B: Project Information

1) Executive Summary

Provide a concise summary of the project, the issue to be addressed, highlights of the goals and objectives and expected results and outcomes. Be sure to link these to the HSIF objective(s).

2) Recipient Profile

- a) *Provide a profile of the recipient to include the recipient organization's mission, goals, primary activities, and membership or target population.*
- b) *Demonstrated capacity and evidence of readiness to implement the project – please describe past project management experience, existing infrastructure of the organization, existing partnerships to be built upon. If possible, include your copy of the latest audited financial report or any other information that might be useful in determining the organisation's capacity to implement the project successfully.*
- c) *Provide a short profile of each of the partner(s) with information similar to that in item 2 a) above.*
- d) *Describe the partners' role/responsibility in the project. Letters of support from the partners must also be provided to demonstrate their commitment and describe their role and participation in the initiative/project. If a previous recipient of AHTF funding, please provide information on the effectiveness of the previous project under AHTF and how the current project will build upon (and not duplicate) the project results to advance integration.*

3) Project Description

a) Statement of Purpose:

- i) *Provide a brief description identifying the specific situation, opportunity, problem, issue, or need that the proposal addresses, including the background and context.*
- ii) *Describe how the proposed initiatives will be broad based and the size of the population that will potentially be impacted (e.g. involve broader # of partners, affecting greater # of services, broader geographic reach, transferable across the province/territory).*

- *Demonstrate that a culturally relevant gender analysis has been conducted in developing this proposal (please see section 5 of this document).*
- *Is it anticipated that one group (e.g. seniors or youth, male seniors or female seniors, etc.) will benefit more or less from the initiatives? If so, should changes be made to adjust for this?*
- *How will the initiative address the diverse needs of the Aboriginal population and clientele in the planning, implementation, and governance?*
- *Would the communities have opportunities to discuss gender-based analysis and traditional gender-based roles as they relate to the initiative?*

iii) Explain why this issue or need is identified as a priority for the proponent, as well as for the target population, and state the intended outcome.

iv) Describe how the project advances the integration of health services/systems on a broader scale. What is the “before picture” and how is this different from the “after picture” of integration envisioned?

v) Describe how the project is consistent with First Nations/Inuit plans and directions in health.

vi) Describe how the project is consistent with provincial/territorial plans and directions in health.

vii) Describe how the initiative/project is consistent with the objectives of the HSIF.

viii) Identify any key challenges/risk and factors that may affect the project and state how they will be addressed/mitigated.

b) Work Plan:

Please briefly describe the goals and objectives of each fiscal year. For each goal and objective please provide an overview of proposed activities, their timelines and outcomes.

Year	Goals/Objectives	Activities	Timelines	Outcomes

c) Budget:

Using the format provided below, prepare a budget computed on an annual basis using the government fiscal year cycle (April 1 – March 31). The budget must be consistent with the narrative and work plan, including a description of how the costs were estimated.

Please refer to the following description of the budget categories for guidance.

1. **Personnel:** A breakdown of salaries, related employee benefits and deductions for the project team, including project manager, research and technical assistants, other support staff, and fees paid to contractors/consultants that may be required for the project.
2. **Supplies and Services:** Expendable office materials, printing, telephone, photocopying, postage, computer services, equipment rental charges, and repair costs. Cost of annual audit reports (required in multi-year agreements) can be included.
3. **Travel and Accommodation:** Project-related travel expenses such as private vehicle mileage, air, train or bus fares, meals, accommodation and per-diem costs. These expenses must not exceed those allowed by the federal Treasury Board guidelines. A rate table is available at http://www.tbs-sct.gc.ca/pubs_pol/hrpubs/tbm_113/menu-travel-voyage-eng.asp
4. **Equipment and Office Rental:** Minor office equipment, furniture, information and communication equipment costs, and rent and utilities costs (if not provided in-kind, free of charge or through another program).
5. **Communication and Dissemination:** Partner or stakeholder engagement costs, conference and meeting costs, advertising, promotion and translation expenses, and dissemination of the results of the initiative, knowledge transfer and/or knowledge translation costs.
6. **Training and Staff Development:** Cost for staff training and development related to the project implementation.
7. **Evaluation:** Contract fees for third-party evaluation, data collection, analysis and reporting.
8. **Capital Cost:** Minor capital expenditures related to infrastructure and implementation of the initiative.
9. **Other:** This may include other necessary project-related costs that do not fit any of the above categories. Please provide details.

Project Title:

Organization:

Category	Fiscal Year	Total
Personnel Project Team Contractors/Consultants		
Supplies & Services		
Travel & Accommodation		
Equipment & Office Rental Cost		
Communication & Dissemination		
Training & Staff Development		
Evaluation		
Capital Cost		
Other (e.g. in kind support). Please provide details		
Total		

4) Attachments

a) Letters of Support from Project Partners.

b) Communication Plan

Provide a communication plan that describes how you engage with partners in the development, implementation and evaluation of the project and how communications with the broader community (Aboriginal community organizations, research/non-governmental organizations and other government departments) will be planned, detailing the tools/methods you will use, timing of activities, etc.

c) Evaluation Plan

Note: All projects receiving funding from HSIF are required to undertake an evaluation to assess the implementation, processes, outcomes and impacts of the initiative/project, including a Gender- Based Analysis. In addition, recipients may be asked to participate in the national and regional evaluation of HSIF, which would include a synthesis of the information and findings generated by all funded activities.

- i. Outline the plan for measuring performance and accomplishment of objectives.*
- ii. Describe how the outcomes of the project will be measured quantitatively and qualitatively.*
- iii. State who might be involved in the evaluation process.*
- iv. Include a logic model.*

d) Sustainability Plan

Note: The HSIF will fund only those transitional costs associated with improving the integration of existing health systems and services, without the need for any incremental or ongoing funding.

- a) Outline a sustainability plan noting measures to plan for the sustainability of this work should it prove to be of benefit desired by partners.*
- b) Please include any existing infrastructure commitments that will support the ongoing sustainability of this work.*

Section 5 – The Value of Sex and Gender-Based Analysis (SGBA)

SGBA is a tool for looking at whether programs, services or policies affect men, women, boys, girls and other sub-groups differently. It aims at increasing equality and minimizing exclusion.

National Aboriginal Organizations, federal and provincial governments, research institutions and many others working to improve wellness and social realities use SGBA, and it comes in many forms.

SGBA is also meant to look at the ways in which our backgrounds, cultures and socio-economic situations interact with sex and gender to contribute to exposures to various risk factors, disease courses and outcomes. Other relevant identity factors are: ethnicity, level of material wealth, physical or mental ability, sexual orientation, position in the community, age or geographic location. There are many others.

It is a policy of the Government of Canada's Health Portfolio to include Sex and Gender-Based Analysis (SGBA) in the design, implementation and evaluation of research, programs and policies in order to address the different needs of men and women, boys and girls.

Application of SGBA: Question Guide

Below are a few questions to discuss as you're developing your project proposal. Your responses will help your project benefit from SGBA.

1. Who are the different sub-groups that might be affected by this project?
For example, men, women, boys, girls, status or non-status, elders, youth, children, people of lower or higher socio-economic status, etc.
2. Will the project's activities vary for the different sub-groups it touches?
 - a. If so, how are the activities planned to vary and why?
 - b. Should anything in the project plan be adjusted to allow for participation by those who should be involved in the project?
3. Will the project's outcomes vary for the different sub-groups it touches?
 - a. If so, how do you expect these outcomes to vary and why?
 - b. Should anything in the project plan be adjusted to pursue better outcomes?
4. Is there any data that we should collect (at the beginning as well as after completion) that would illustrate how the project has had an affect on different sub-groups?