
PRIMHD NGO User Group:

Summary report:
2009 - 2011

Platform Trust

June 2011

Intended Audience

The intended audience for this document is the PRIMHD NGO User Group. The document is not intended for public distribution.

Acknowledgements

The implementation of PRIMHD is a complex change management initiative and as such, it has required vision and leadership from a range of key stakeholders. Platform Trust would like to take this opportunity to thank the past and current members of the PRIMHD NGO User Group for their commitment to improving the performance of the mental health and addiction NGO sector so that consumers have access to the best possible services.

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1. INTRODUCTION

1.1 Objectives of the NGO User Group

The PRIMHD NGO User Group was funded by the Ministry of Health under the auspices of Platform Trust to support the implementation of the Programme for the Integration of Mental Health Data (PRIMHD) into mental health and addiction NGO services. The Group brought together key representatives from the Ministry of Health, Platform Trust and each of the four regions, including nominated NGO providers, the PRIMHD Regional Coordinators and representatives from the PRIMHD regional governance groups. The purpose of the Group was to:

1. Support sector ownership and effective use of information.
2. Present a user perspective on the development and implementation of information related initiatives for all mental health and addiction NGO providers.

1.2 Membership

The current membership of the Group is shown in the table below:

Member	Organisation	Sector represented
Marion Blake (chair)	Platform Trust	NGO
Alistair Cree	Richmond NZ	NGO
Lyndsay Fortune	Pathways	NGO
Carole Searle	MASH Trust	NGO
Ian Bale	Pretoria Lodge	NGO
Ian McKenzie	Northern DHB Support Agency	Planning and Funding
Lorna Murray	Connect Supporting Recovery	NGO
Pauline Morrison	Capital & Coast DHB	Planning and Funding
Renata Balfour	Capital & Coast DHB	PRIMHD NGO Regional Coordinator
Soledad Labbe-Hubbard	Northern DHB Support Agency	PRIMHD NGO Regional Coordinator
Virginia McEwan	Wellink Trust	NGO
Vivienne Martin	Midland Mental Health and Addictions Network	PRIMHD NGO Regional Coordinator
Deb Fraser	Mirror Counselling Services	NGO
Kyle Hawkins or Dita Ciulacu	Richmond NZ or PACT	PRIMHD NGO Regional Coordinator
Hine Martin	Te Pou	National mental health & addiction service development agency
Memo Musa	Ministry of Health	Central government
Phillipa Gaines	Platform Trust	NGO
Katie Weastell	Platform Trust	NGO

With a few exceptions, the core membership of the group has remained relatively stable over the last two years. This consistency has proved invaluable in terms of members building a collective understanding about different aspects of PRIMHD.

The delayed formation of two of the regional governance groups meant that NGO representatives from the Central and Southern regions joined the NGO User Group late in the process. It is not clear to what extent this had an impact on the availability of information for NGO providers within each of these regions, as the PRIMHD Regional Coordinators have done a good job in communicating with the NGOs in their area, but it did weaken the representation of NGO issues from these regions at the national level, especially early in the implementation process.

A number of changes to the role of the Ministry's PRIMHD Programme Manager caused the project to lose focus and momentum at various times, but these changes were mitigated in part, by key people in Platform Trust and each of the regions remaining the same. In addition, it was fortunate that the Ministry sponsor for the PRIMHD project also remained the same over the two year period, despite several restructures within the Ministry of Health. The sponsor was able to attend every meeting of the PRIMHD NGO User Group, which provided continuity, as well as providing an opportunity for members to directly raise any issues for immediate clarification or further discussion.

1.3 Delivery against the main objectives of the Group

The Group has functioned well as a national forum whereby members were able to discuss issues related to the implementation of PRIMHD and work together to generate solutions. As the members of the Group are the 'thought-leaders' for information development in the NGO sector, the Group has naturally evolved from just talking about the 'nuts and bolts' issues associated with the implementation of PRIMHD to discussing how best to support the future development and use of information in the NGO sector, particularly beyond the scope of the PRIMHD project. From this perspective, the Group could be said to have over-delivered against its main objectives. These objectives are outlined in the table below:

#	Objective	Status at the end of the project
1	Facilitate an understanding of the benefits which can be realised through the effective use of information (including benchmarking), and focus on these benefits to support decision making at local, regional and national levels.	Achieved but ongoing activity needed in this area.
2	Support the development of routine monitoring and evaluative practices by NGOs.	Partially achieved Ongoing activity needed in this area – this is a core aspect of the paradigm shift for the sector.
3	Support, advise and guide the national implementation of PRIMHD with regards to the NGO sector, with particular attention to those providers that are still to report PRIMHD.	Achieved
4	Monitor progress in each of the regions with regards to the ongoing implementation of PRIMHD for NGOs.	Achieved

#	Objective	Status at the end of the project
5	Actively promote the vision and philosophy behind the PRIMHD initiative with local, regional and national NGO provider groups.	Achieved

The challenge for the future is to continue to support the NGO sector to focus on achieving the following paradigm shift – the systematic use of information to improve performance.

1.4 Meeting attendance

The Group held eight meeting over the period August 2009 to June 2011.

Attendee	31/08/09	24/11/09	23/02/10	25/05/10	07/09/10	30/11/10	01/03/11	16-Jun-11	Meetings eligible	Meeting record
Marion Blake	y	y	y	y	y	y	y	y	8	8
Phillipa Gaines	y	y	y	y	y	y	y	y	8	8
Katie Weastell	N/A	N/A	N/A	y	apology	y	y	y	5	4
Lorna Murray (Northern)	y	y	y	y	y	apology	y	y	8	7
Carol Searle (Central)	N/A	N/A	N/A	y	apology	Angela	y	y	5	3+1 sub
Deb Fraser (Southern)	N/A	N/A	N/A	N/A	N/A	y	y	y	3	3
Ian Bale (Midland)	N/A	y	y	y	y	Apology	y	y	7	6
Toni Gutschlag	absent	apology	absent	absent	absent	y	apology	resigned	8	1
Pauline Morrison	Nigel	y	Sandra	absent	y	Susan	Sandra	Sandra	8	2+5 subs
Virginia McEwan	y	y	y	apology	y	y	y	y	8	7
Lyndsay Fortune	N/A	y	apology	y	y	y	apology	apology	7	4
Alistair Cree	y	y	y	y	y	y	apology	y	8	7
Ian McKenzie	y	apology	y	y	y	y	y	y	8	7
Renata Balfour	N/A	y	absent	y	y	y	y	y	7	6
Soledad Labbe-Hubbard	N/A	y	y	y	y	y	y	y	7	7
Vivienne Martin	y	y	apology	y	y	y	y	y	8	7
Dita Ciulacu /Kyle Hawkins	N/A	Sonia	y	y	y	y	y	y	7	7
Hine Martin	N/A	N/A	N/A	N/A	N/A	N/A	y	y	2	2
Rick Rainey	y	y	y	apology	apology	N/A	N/A	N/A		
Dionne Willcocks (A&OD)	y	absent	resigned	resigned	resigned	resigned	resigned	resigned		
Janie McIntyre (Southern)	N/A	N/A	y	apology	resigned	resigned	resigned	resigned		
Kay Fletcher (Southern)	N/A	N/A	N/A	N/A	apology	resigned	resigned	resigned		

1.5 Functioning of the Group

The functioning of the Group has been assessed against the following criteria:

Criteria	Assessment
The Group is adequately resourced to perform the task.	Achieved
Meetings are well planned and documented (including agendas and minutes).	Achieved
The expertise and time of the members is used well to discuss and resolve issues.	Achieved
Good communication occurs between meetings (PRCs act as the focal point for the regions).	Achieved
There is demonstrable commitment from the Ministry to consider the issues that are raised and the advice that is given by the Group.	Achieved

2. SUMMARY OF ACTIVITIES – PLATFORM TRUST

Platform Trust has provided the following services to support the implementation of PRIMHD:

2.1 Regular and ad-hoc support for the PRIMHD rollout

- Established and convened the fortnightly teleconferences with the PRIMHD NGO Regional Coordinators (PRCs), Platform Trust and the Ministry of Health.
- Provided administration and coordination services for the quarterly face-to-face meetings of the PRIMHD NGO Regional Coordinators and the Ministry of Health.
- Provided administration and coordination services for the quarterly face-to-face meetings of the PRIMHD NGO User Group.
- Participated in fortnightly liaison meetings with the Ministry's National Rollout Coordinator to discuss progress, share sector intelligence, address any issues and to work together on different aspects of the PRIMHD project.
- Participated in regular meetings with the Ministry's Data Management Team to discuss progress and to identify any support needs for those NGOs that were identified as belonging to stage 2 of the PRIMHD rollout.
- Presented PRIMHD and NGO infrastructure requirements to some of the major PMS vendors at a meeting convened by the Ministry of Health.
- Worked with the Ministry to co-host a national IT vendor forum for all interested mental health & addiction NGO providers.
- Attended the national DHB PRIMHD Site Coordinators meeting to update the group about progress on the NGO implementation of PRIMHD and to discuss those areas where DHB and NGO interests might overlap.
- Provided input into the development and testing of the NGO reports.
- Visited a range of NGO providers to gather their feedback on the implementation of PRIMHD, answer their questions and to discuss their response to the NGO reports.
- Facilitated a meeting between the Ministry and sector representatives on the production of PRIMHD reports using Business Objects.
- Maintained the PRIMHD NGO Issues Register and provided regular updates to the National PRIMHD Project Board (formerly the PRIMHD Executive Steering Group).

2.2 Sector liaison

- Attended a number of local/regional NGO provider forums to talk about PRIMHD and related NGO information developments (e.g. Navigate, NGO-us).

- Coordinated the evaluation of the DoView Easy Outcomes Model with Te Pou and five mental health NGO providers.
- Convened a regional workshop for health & disability NGO providers in the Midland area on the use of information for performance development purposes.
- Visited a range of NGO providers to gather their feedback on the implementation of PRIMHD, to answer their questions and to discuss their feedback about the NGO reports.

2.3 Interface with government departments

- Liaised with the Ministry about the mismatch between the PRIMHD Code Set and the Purchase Units in the Nationwide Service Framework.
- Reviewed the Ministry of Health Business Requirements for the proposed review of PRIMHD (to be undertaken under the auspices of HISO).
- Met with key staff from the National Health Board to discuss priorities under the National Health IT Plan and to highlight the needs of the NGO sector with regard to information collection, exchange and use.
- Met with senior staff from the Ministry for Social Development to open discussions about cross-government (MSD/DHB/MoH) contracting, especially in relation to NGO provider contract reporting.
- Participated in workshops run by the Association of Non-Governmental Organisations of Aotearoa (ANGOA) on outcome reporting by community agencies.

3. SUMMARY OF RESOURCES – PLATFORM TRUST

In addition to the activities that are outlined in the previous section of this report, Platform Trust has also developed the following resources to support the Regional Coordinators and NGO providers with the implementation of PRIMHD:

- Scope of PRIMHD.
- Key messages for NGO providers.
- Glossary of terms and abbreviations.
- ‘Metrics that Matter’.
- FAQ describing the legal issues around the retention of health records.
- FAQ describing the proper use of the National Health Index (NHI) number.
- A document to assist key stakeholders to consistently interpret the national PRIMHD Code Set in an NGO environment.
- Resource document for NGOs that are involved in the implementation of PRIMHD (still currently under development).

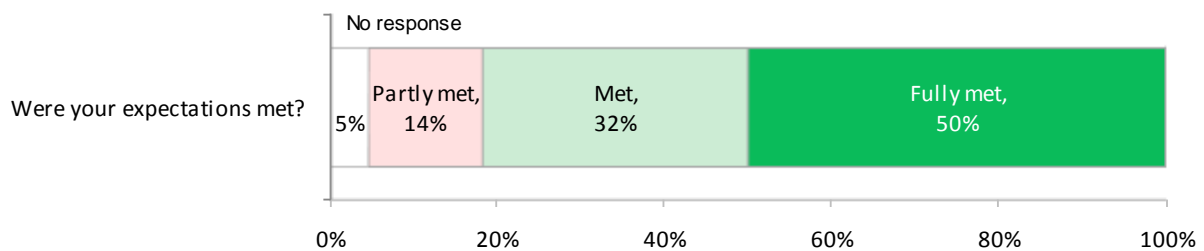
All of the documentation that has been developed by Platform Trust over the course of the project will be made available to the sector via the Platform website. Similarly, each of the regions has also developed their own list of resources for both funders and NGO providers to use as part of the handover process at the end of June 2011.

To avoid the risk of duplication, and the possibility that any resources that are developed now will quickly become outdated, the Ministry has agreed that it will retain responsibility for managing and maintaining the core documentation for PRIMHD. All of the other agencies have agreed to manage any changes to their own resources so that the content continues to align with the information that is published by the Ministry. All references to documents that are maintained by the Ministry will also include a hyperlink that will refer the reader back to the Ministry website.

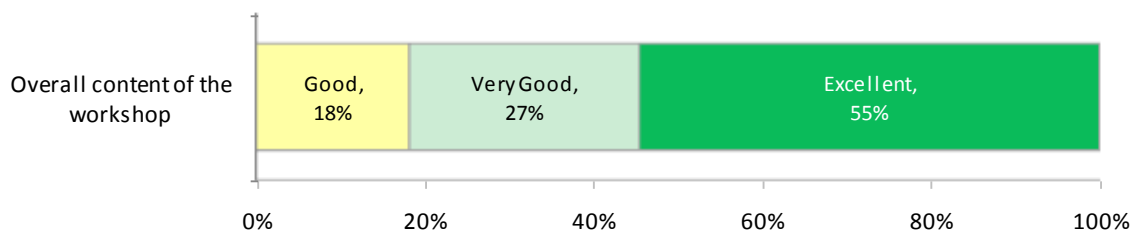
4. EVALUATION OF THE NGO INFORMATION WORKSHOP

The following results are a summary of the feedback that was received from the participants that attended the health & disability NGO information workshop held in Hamilton on 24 May 2011. Twenty five people attended the workshop and twenty two of these completed the survey.

1. Were your expectations of the workshop met?



2. Overall content of the workshop



3. Which speaker(s) or session(s) did you learn the most from?

Marese McGee, Kate McKegg, Dr Rod Watts, Rowena Sinclair and Lorna Murray.

4. What other topics could be included in future workshops that are focused on NGO information developments?

- Other perspectives - service user voice, Maori, funder.
- Sharing resources in a funding-strapped environment.
- Discussion on organisational values and missions and how to safeguard them when getting funding.
- Linking evaluative process to mission/values. How to engage stakeholders in the process. How to formulate evaluative questions and matrixes. Results based Accountability - how to apply the RbA model.
- More info on actual 'how to' capture info. Database versions to assess and other tools. IT options.
- Research developments.
- Social return on investment (SROI). More learning similar to Kate McKegg's presentation and less experience stories.
- Would certainly listen to an extended version of Lorna's presentation.

5. SUMMARY

5.1 Implications for the future

While there is a shared vision about what a high-performing NGO sector might look like, the NGO User Group acknowledges that there is still much to be done to assist the majority of NGO providers to understand the new performance paradigm and to resource the concerted effort that is required to break out of the old one and to change their current organisational practices. For example, it is notable that the four NGOs that are involved in the DoView Outcomes pilot have all commented on how difficult it is to implement a new conceptual model, even when the key people within the organisation are keen on it. If this has been the experience of the early adopters, then it will even more difficult for the NGO providers that follow them.

Having said this, it may be that the process of change appears to be slow for some time, but that the seeding of ideas works to encourage the majority of NGOs towards the ‘*tipping point*’, especially if conversations about different ways to improve organisational performance are occurring within the context of the forces that exist in the wider social and political environment.

In order to arrive at the ‘tipping point’, the NGO sector must first work out ways to deal with Newton’s first law of motion – *an object at rest will remain at rest unless acted upon by an unbalanced force*. In the absence of dedicated resources to initiate and sustain conversations about performance improvement amongst different groups of stakeholders, the early adopters in the NGO sector will focus on making progress within their own organisations, and possibly with one another. However, the sum of their influence will be insufficient on its own to overcome the level of inertia in the wider NGO sector. For this reason, the NGO User Group could play an important role as one of the ‘*unbalancing forces*’ in the mental health and addiction system. Sections 5.1 and 5.2 outline some options for the Group in the future with this goal in mind.

5.1 Options for the Group

As the PRIMHD project has officially come to a close and the focus of the mental health and addiction information development agenda is shifting, it is a good time to reflect on the last two years of the PRIMHD implementation and to re-examine the functions and responsibilities of the PRIMHD NGO User Group with a view to making a decision to (a) terminate the Group (b) continue it in its current format or (c) refresh it.

At this stage, it is important to identify the need and the level of interest in continuing the Group. If the Group is still deemed to be relevant, either in its current form or a revised format, it may need considerable change to the membership and/or terms of reference, in which case it may be worth considering formal closure and the re-establishment of a new or modified group.

Another consideration includes a revised governance structure that is consistent with other developments in the mental health and addiction sector (e.g. KPI project) and in alignment with other regional/national health information related initiatives (e.g. under the Health IT Plan). Moreover, if the views of some key stakeholders need representation on the Group, but a national group is not considered to be the best forum, then the Group will need to agree as to who should be responsible for ensuring that these voices are heard and the mechanisms that will be utilised to monitor that this happens?

5.2 How do we keep the group running effectively?

Time and money considerations

Participation in the group involves time costs for all members, including Platform Trust, as the agency that is responsible for coordinating the Group.

Up until June 2011, all of the flights for those NGO members living in different regions have been met by the Ministry of Health. If there is no dedicated budget for the Group then funding for basic costs such as travel may either have to be sourced from elsewhere, or, in the absence of this funding, the Group may only be able to meet infrequently and/or by videoconference.

Dedicated resources

Without a dedicated resource to support the Group and to coordinate activities between meetings, it will inevitably succumb to Newton's First Law of Motion – *inertia*. At the very least the Group requires an agency that is able to provide the support functions for the Group and which also has a mandate from the sector to do so.