BUILDING AND ALIGNING A PROJECT MANAGEMENT FUNCTION INSIDE AN FQHC
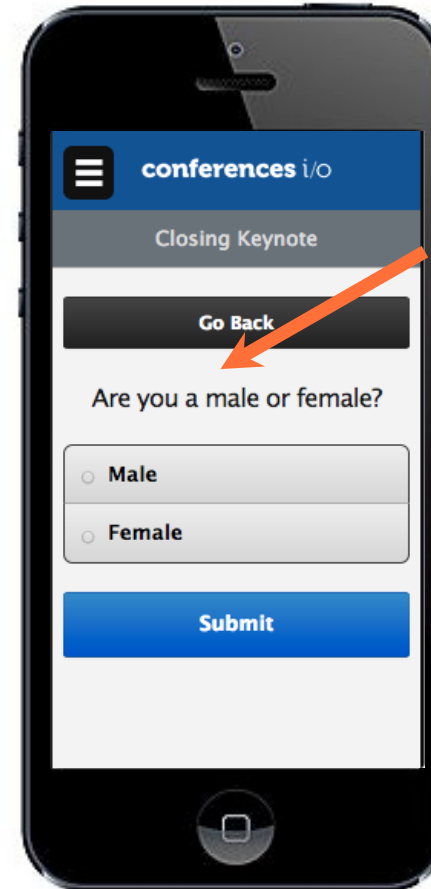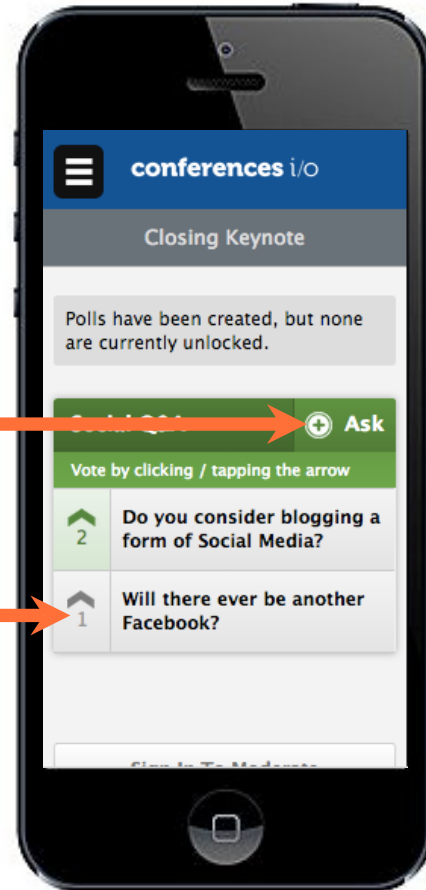
FOM/IT CONFERENCE – OCTOBER 2022

In-Person Participants

Give us Feedback

Up-Vote a Comment

Click on question and then Respond to Polls when they appear

Vote / Give Feedback/ Respond to Polls

Virtual Participants

Chat
(use to talk with peers)

Polling/Q&A
(participate in polls, ask questions to faculty)

AGENDA

- A distributed PM model and our challenges

- Centralizing and standardizing a PM resource

- Learning objectives for today

- PMT development process

- Change management

- Project effectiveness evaluation

- Successes and areas of opportunity

- Q&A

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DISTRIBUTED PROJECT MANAGEMENT

Project Roles

- Non-standardized/absent project artifacts resulted in different definitions of 'done'.
- Assumption of skill sets for many roles.
- Complexity engaging cross departmentally

Capacity & Resources

- Ad hoc prioritization resulted in competing priorities.
- No shared definitions of what types of effort required project management
- Extra churn contributed to an already burnt-out workforce

Project Visibility

- Colliding project decisions created conflict.
- Staff engagement survey cited issues with accountability and transparency.
- Vendors were able to sway project efforts.
- Projects lost momentum.
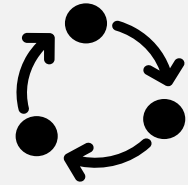
Process

- Sense of urgency translated into moving too fast and missing details.
- Resistance to process-heavy structures
- Organizational culture values relationship building over efficiency

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Submitted grants for a large number of projects through ARPA, including the funds to project manage their implementation

Realized it would result in a high degree of competing priorities, which we had never navigated before

Needed to coordinate and build a framework for executing on multiple projects at once.

THE OPPORTUNITY AND THE CHALLENGE

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EVOLUTION TO CENTRALIZED PROJECT MANAGEMENT

IT PMO → *Three Month Build Phase* → **Project Management Team**

Fall 2021 ─────────────── **Spring 2022**

	Fall 2021 (IT PMO)	Spring 2022 (Project Management Team)
Scope	• Manages and prioritizes projects delivered through the IT department	• Manages and prioritizes projects delivered by all departments
Prioritization	• Prioritizes projects based on IT strategy and objectives	• Prioritizes projects based on Neighborcare's strategy and objectives
Structure	• Sponsored by IT leadership • Staffed by IT project managers	• Co-sponsored by cross-functional leaders • Staffed by centralized team of project managers

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VISION
We will join with the communities we serve to deliver care with compassion and excellence in the spirit of equity and humility to empower all to live their healthiest lives.

ULTIMATE GOAL
100% access
0 health disparities

PATIENTS
Making it easy to provide great care

COMMUNITY
Creating a healthy community

PEOPLE
Creating the best place to work

STEWARDSHIP
Building confidence in our future

- Ensure financial wellness
- Expand sustainable funding sources

EQUITY, DIVERSITY & INCLUSION

Every individual at Neighborcare will feel welcome and valued, and we will honor and respect the unique perspectives, history and challenges of our patient and staff populations.

MISSION: The mission of Neighborcare Health is to provide comprehensive health care to families and individuals who have difficulty accessing care; respond with sensitivity to the needs of our culturally diverse patients; and advocate and work with others to improve the overall health status of the communities we serve.

VALUES: Social Justice, Cultural Sensitivity, Community, Excellence

SERVICE COMMITMENTS: A Warm Welcome, Caring, Respect, Working Together, Trusting Relationship

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STEWARDSHIP
Building confidence in our future

- **Ensure financial wellness**
- **Expand sustainable funding sources**

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2022 - 2024 STRATEGY

VISION
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ULTIMATE GOAL
100% access
0 health disparities

PATITENTS
Making it easy to provide great care

COMMUNITY
Creating a healthy community

PEOPLE
Creating the best place to work

STEWARDSHIP

Building confidence in our future

Improve operational and organizational efficiency

- Mature project management capabilities

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TODAY'S LEARNING OBJECTIVES

- Success factors for implementing a project management team in a healthcare setting

- Challenges and opportunities for change management in healthcare

- Benefits realized from the project management team

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A PROJECT MANAGEMENT TEAM WILL GIVE NEIGHBORCARE THE STRUCTURE AND RESOURCES TO DELIVER LASTING, **SUSTAINABLE CHANGE.**

BENEFITS TO STAFF AND OUR COMMUNITY
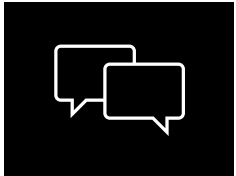
Action and Accountability

- Visibility into project priority and status drives accountability
- Transparent decision-making processes give staff knowledge about projects and who is working on them
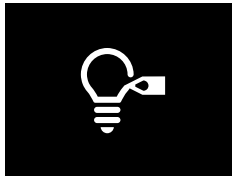
Thorough Implementations

- Structure, visibility and resource planning will pace changes, reduce project collisions and improve project results
- Provides support to smoothly transition changes to everyday work
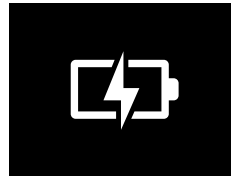
More Capacity, Less Burnout

- Staff can focus on growing expertise in their role, not project management
- Gives leaders capacity to prioritize supporting, listening to and caring for staff
- Strategic prioritization will allow the organization to say "Not right now"

Inclusive Staff and Patient Engagement

- Standard processes allow for more input from staff and patients
- Provides the structure and resources to be successful in project work

Support Patient Care

- Brings strategy, excellence, and sustainability to our organization so clinics can deliver comprehensive care

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PROJECT MANAGEMENT TEAM OBJECTIVES

Deliver Desired Outcomes

- Projects and programs completed on time
- Risks and Issues addressed
- Projects tracked against expectations.

Enable Effectiveness and Consistency

- Consistent practices and templates foster better collaboration and teamwork.
- Reduced risk through standardized techniques.

Utilize Motivated, Skilled People

- Project teams have clear expectations and have the training and tools to execute.
- Teams are recognized and feel motivated to deliver.

Enable Timely, Informed Decisions

- Visualization of project, program and portfolio metrics provide clear direction for decision making.

Maximize Value

- Projects are evaluated in a portfolio to maximize value to the organization.
- Portfolios are evaluated consistently for priority and expected results.

Align the Organization

- Governance and organizational support are in place for successful organizational transformation.

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PMT ROADMAP

Build
Dec '21 — Jan '22 — Feb '22

Grow
Mar '22 — Apr '22 — May '22 — June '22 — July '22 — Aug '22 — Sep '22 — Oct '22 — Nov '22

Mature
Dec '22 — Jan '23 — Feb '23 — Mar '23

PMT Launch
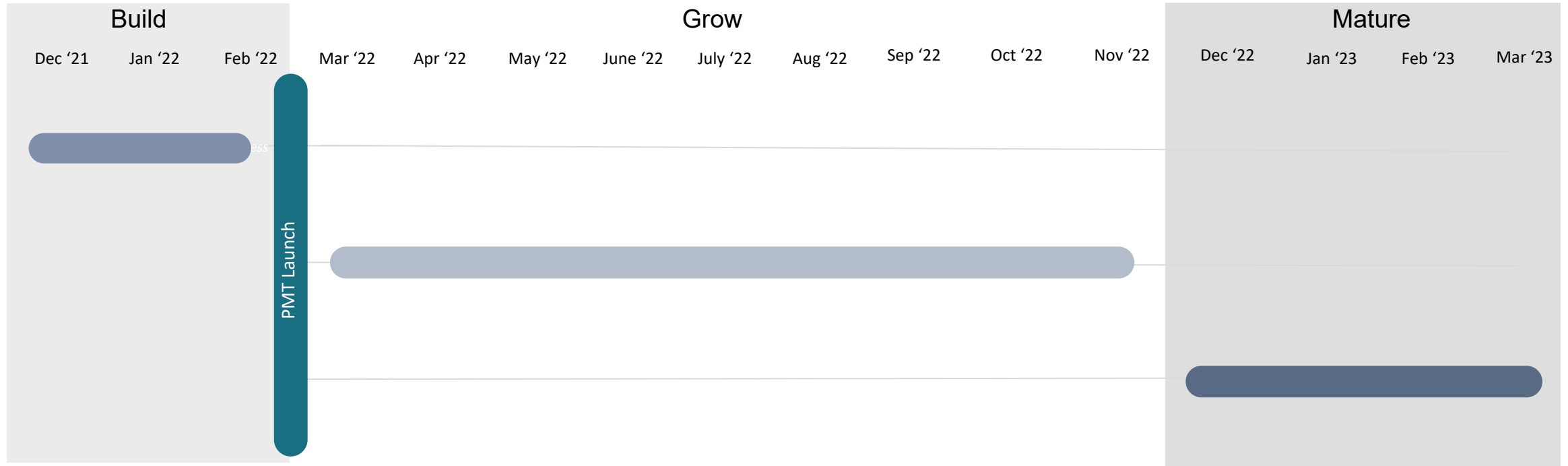
01 Build

- Org structure & champions
- Definition of a project
- PMT job descriptions
- Staffing up
- Project list
- Project backlog
- Intake process
- Steerco & governance
- Change management
- Tools & templates (charter, status report, etc.)

02 Grow

- Refine/expand governance
- Develop capacity planning model
- PMT reporting & data availability
- Identify key metrics and OKRs
- Mature best practices
- Mature tools

03 Mature

- More mature resource management
- Portfolio-level reporting & dashboards
- Introduce more mature toolsets (PM schedule tool, data visualization, etc.)
- Explore agile delivery concepts
- Start driving to delivery against metrics and OKRs

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WHAT IS A PROJECT?

Project Definition

A project is a **temporary endeavor** undertaken to create a **unique** product, service or result.

Project Characteristics

Finite Scope

- Has a clearly defined scope
- Specific set of activities designed to accomplish a singular goal or set of goals
- Represent smaller, tactical bodies of work that support a goal or multiple goals

Cross-Functional and Sponsored

- Require cross-coordination, oversight, funding, and management
- A project team often includes people who come together from different departments or functional areas

Temporary

- Has a defined beginning and end
- The project is concluded when the project milestones laid out in the project charter and agreed to by the project team are met
- After completion of the project, work may be continued/maintained and incorporated into daily work and leadership
- Cross-functional project team no longer meets and PM support ends

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PMT GOVERNANCE STRUCTURE

Decisions & Escalations

Senior Leadership Team
Executive leadership, change leaders and escalation point

PMT Steering Committee

CTC

PMT STEERING COMMITTEE Determines prioritization of all Neighborcare projects

CLINICAL TECHNOLOGY COUNCIL (CTC) Advises on prioritization of clinical technology projects

Project Management Team (PMT)
Enables and supports strategic projects as directed by PMT SteerCo

Project Teams / Work Groups
Formed and disbanded based on in-flight projects and other evolving needs

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PMT STRUCTURE AND ALIGNMENT

Cora Weed
PMT Co-Sponsor

PMT co-sponsors provide breadth of skillset and experience; maintain leadership alignment across portfolio

Sarah Ramsay
PMT Co-Sponsor

PMT Lead

EPMO Lead has functional and people leadership to the PMs in the ~~EPMO~~

Project Manager

Project Manager

Project Manager

Project Manager

Project Manager

Project Manager

Roles within the EPMO to support the broader function

Change Manager

Data & Process Analyst

PMs can have alignment to specific departments, but common best practices & tools allow them to flex across both based on capacity needs

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Note: number of project managers shown is illustrative; number of project managers to be determined based on NCH needs

PROJECT TEAM ROLES

DAY-TO-DAY PROJECT TEAM

PROJECT SUPPORT

Owner	Project Manager	Project Team Member(s)	Sponsor	SME
• Likely the person who will have long term operational responsibility for the project after closure. • Involved in the daily decisions. • In some projects, the owner may also be the acting sponsor and will be responsible for both roles.	• May be a titled project manager or an "acting project manager" • Responsible for running the project, documentation, escalating issues, facilitating meetings etc. • Creates and drives change management plan • Responsible for drafting change management communications and facilitating completion of training content, as needed. • There may be more than one PM for a large project or where there is a vendor PM involved.	• Responsible for "doing" • Participate in the daily/weekly activities on the project • Support and contribute to the decision-making process and goals of the project	• Typically, a senior leader or director level leader, who is primarily responsible for the outcome of the project • Final escalation point for issues or decisions. • Likely the stated author who "sends" organizational messaging. • Does not participate in day-to-day project activities. • Note: If the owner and sponsor are the same person, the owner will participate in day-to-day project activities.	• SME (subject matter expert) is different from a project team member because they may only have responsibility for a small section of the project or for providing guidance in one area • Has a vested interest in project outcome but may not participate day-to-day delivery

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PMT PRIORITIZATION MODEL

Strategic Plan

Project aligns to NCH strategic plan objectives:

- None = 0
- Aligns to one objective = 1
- Aligns to 2-3 objectives = 3
- Aligns to >3 objectives = 5

+1 point for direct EDI alignment

Weighted x1.2 for an outsized impact

Impact

The results obtained, or influence gained by implementing

- Influences broad areas of the organization
- Certitude of outcomes
- Significant improvement of processes and/or alleviates existing pain points

Will be assigned a scale of 1-5.

Priority

Priority given by the team proposing the project

Priority score reflects the relative priority within team proposing the project.

Will be assigned a scale of 1-5.

Urgency

Readiness for a situation/opportunity and reduction of risk

- This project is a regulatory requirement.
- Other services/products/projects depend on it.
- There is an issue/opportunity that needs immediate action.
- External forces

Will be assigned a scale of 1-5.

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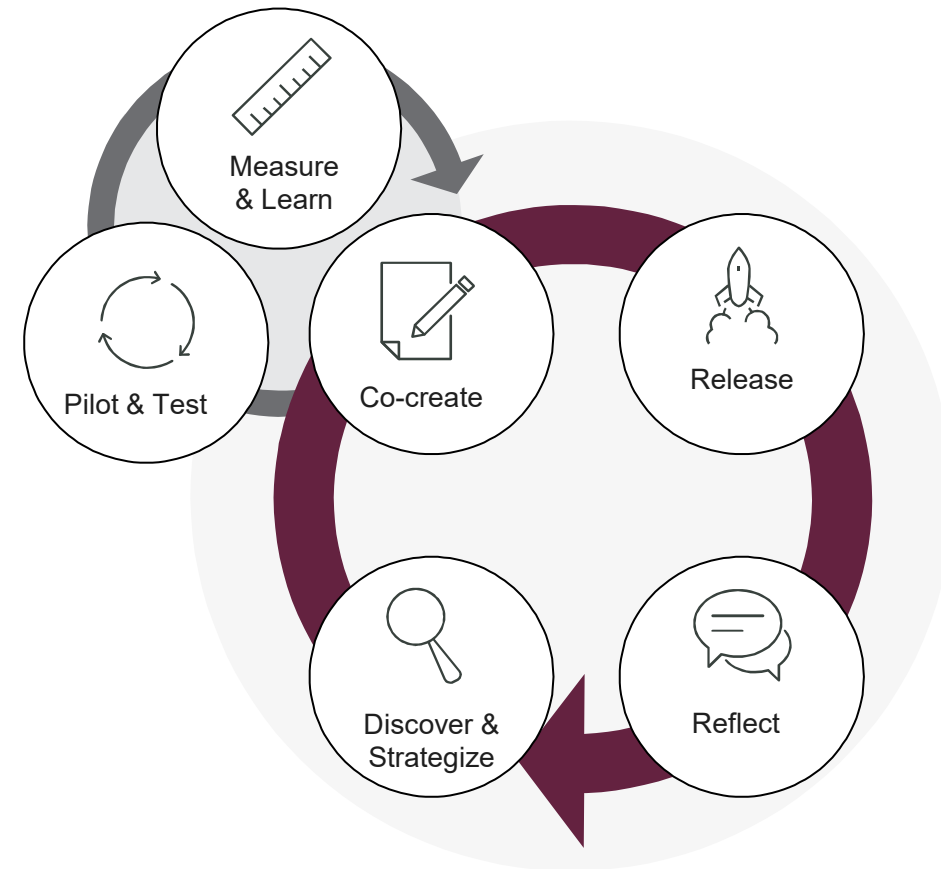**Note: Resourcing & capacity is accounted for as a second step to this process**

CHANGE AGILITY CYCLE

The Change Agility Cycle illustrates an **iterative process to create and release a series of change activities.**

The objective is to **seek to understand the impacted user** and their shifting needs as change is introduced.

This approach is grounded in working together to leverage quick, iterative releases based on **continuous feedback and bite-size release of change deliverables.**

Measure & Learn

Pilot & Test

Co-create

Release

Discover & Strategize

Reflect

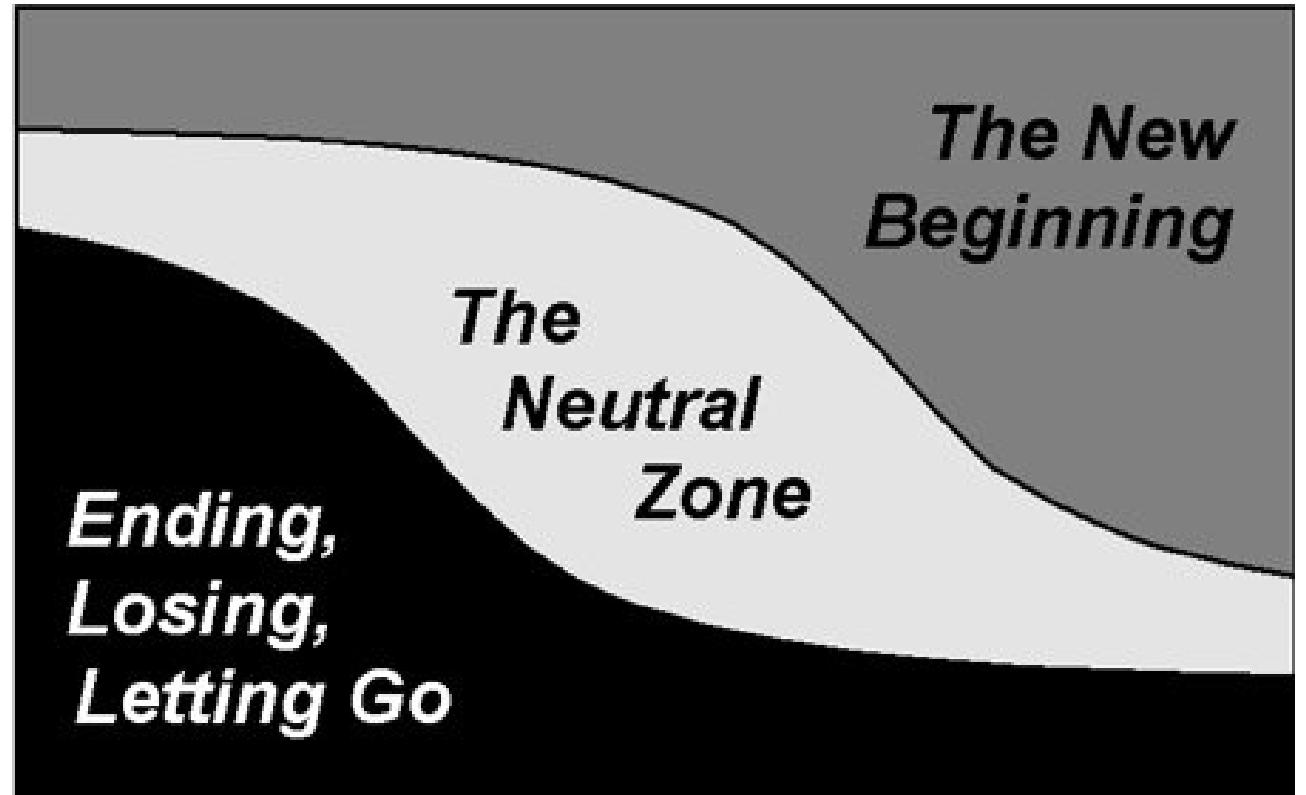neighborcare health

Ending, Losing, Letting Go

- Letting go of the old ways and the old identity people had.
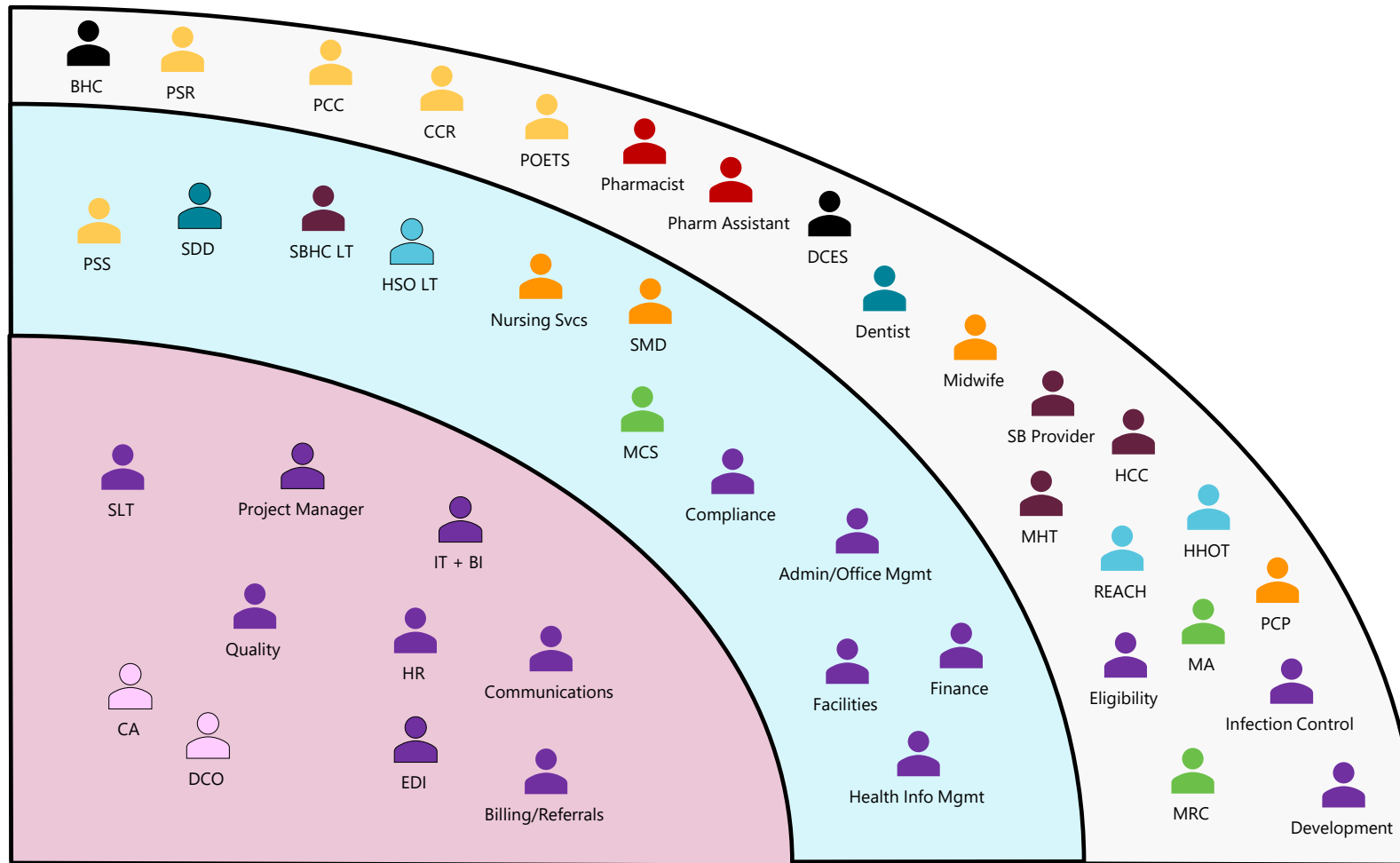
The Neutral Zone

- An in-between time when the old is gone but the new isn't fully operational.

- Critical psychological realignments and repatterning takes place.

- **The New Beginning**

- Coming out of the transition and making a new beginning.

- People develop the new identity and discover the new sense of purpose that makes the change begin to work.

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PMT IMPACTED GROUPS

KEY

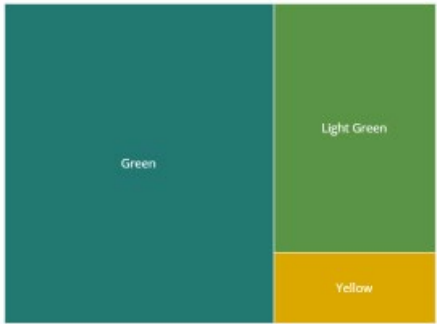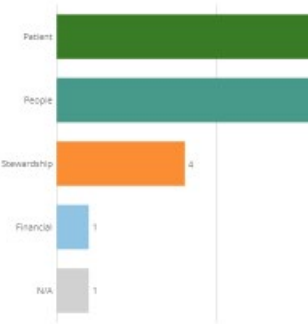|	Impact by Change
High	• Directly impacted by the change. • Large changes to processes, skills and knowledge, and tools and technologies. • Likely changes to the organization structure and job responsibilities; a moderate mindset change is expected.
Medium	• Directly impacted by the change. • Likely small to moderate changes to processes, skills and knowledge, and/or tools and technologies. • Small or unlikely changes to organization structure, and moderate changes to job responsibilities.
Low	• Directly/indirectly impacted by the change. • Small changes to processes, skills and knowledge, and/or tools and technologies. • May be small changes to job responsibilities as well.

Groups (High/Medium/Low impact zones): BHC, PSR, PCC, CCR, POETS, Pharmacist, Pharm Assistant, DCES, PSS, SDD, SBHC LT, HSO LT, Nursing Svcs, SMD, Dentist, Midwife, MCS, SB Provider, Compliance, HCC, Admin/Office Mgmt, MHT, REACH, HHOT, SLT, Project Manager, IT + BI, Quality, HR, Communications, CA, DCO, EDI, Billing/Referrals, Facilities, Finance, Eligibility, MA, PCP, Infection Control, Health Info Mgmt, MRC, Development

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DASHBOARD

PROJECT EFFECTIVENESS EVALUATION
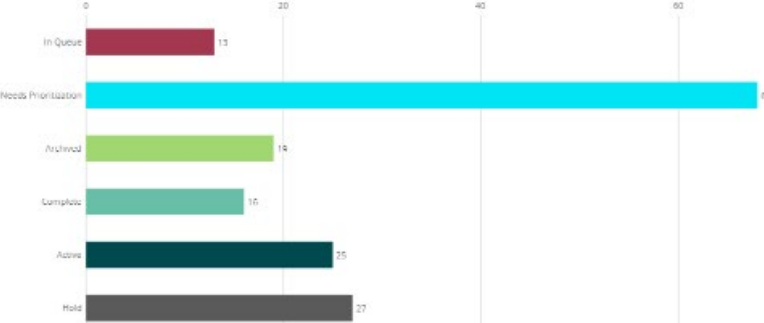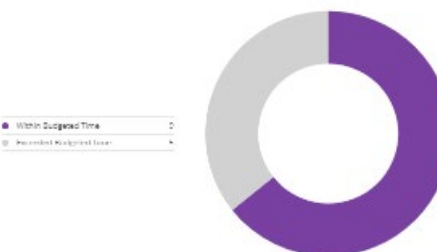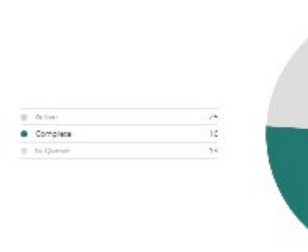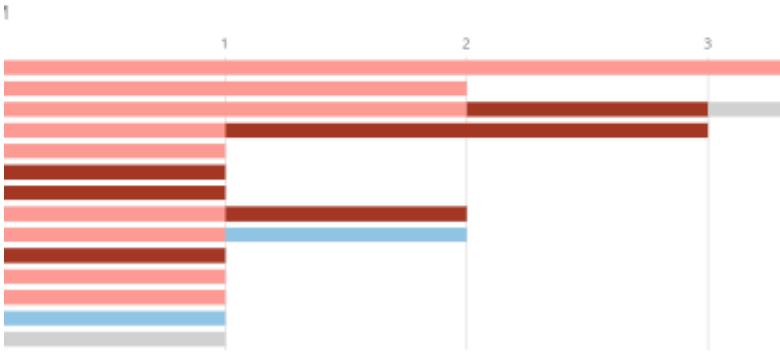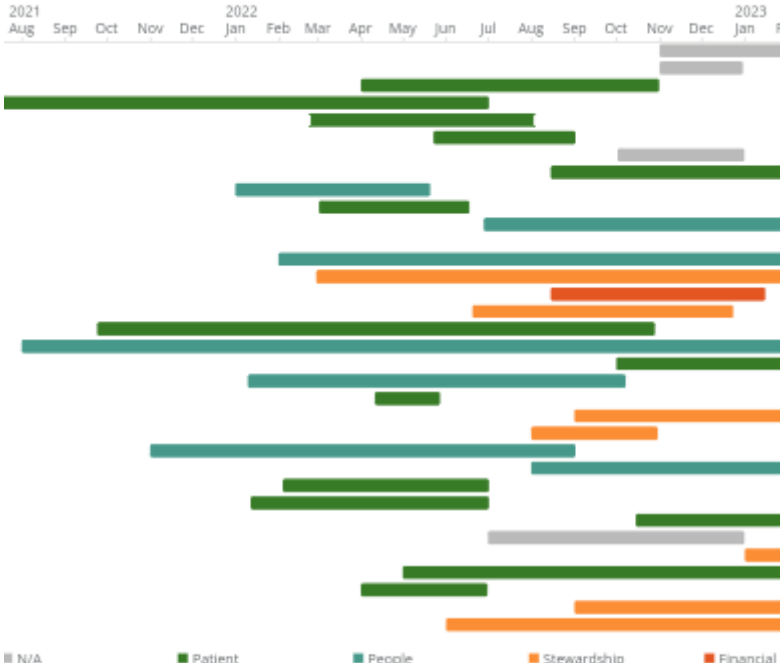
PMT SUCCESS METRICS

PMT Portfolio
Since start of PMT (3/17)

13 # of Projects Completed

45 # of Projects Prioritized

100%
Completed Projects with Sustainability Plans

13 # projects moved from backlog to future-state roadmap

Projects Completed
Within Planned End Date

56%

Steady-State
# of Active Projects

24

being managed by 14 project managers

Avg. # of Departments Involved
by project size

Small: 2-3 departments

Medium: 4 departments

Large: 6-7 departments

Avg. Length of Completed Projects
by project size

Medium (56% total projects) 5.7 months

Small (31%) 3.9 months

Large (13%) 7 months

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10/18/2022

KEY AREAS OF SUCCESS

What have we seen so far?

Standardization to Process

- Established toolsets that anyone can use, reduces the need to re-create the wheel for leadership
- Consistency in process so clear expectations are set
- Common understanding of roles, tools and framework for implementing projects

Cross-Functionality and Visibility

- Improved cross functional team communications, visibility into organizational initiatives
- Consistent communication and improved accountability with new dashboards & change management methodology

Reduce Collisions & Prioritize

- Learning how to plan for resource allocation
- Developing the muscle and infrastructure to say "not right now"

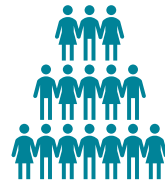neighborcare health

MATURITY PLANS

Measure Impact

Role/Comp Alignment to Project Responsibilities

Resource Management

Long Term Staffing Model

Stronger project and strategic planning alignment

Data Visualization Tools Evaluation

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Q&A

WHAT QUESTIONS DO YOU HAVE?

QUIZ QUESTION BRAINSTORM

1. Why implement a PMO?

2. What are some of the first steps to building a PMO?

3. Define change management

4. What unique challenges are there to change management in a healthcare environment?

5. What does a Steering Committee do?

6. Name one element to consider in a prioritization model

7. What are the responsibilities of the project owner?

8. Name one of the first elements of success realized

9. Name a PMO (healthcare) challenge

10. What maturity steps should be considered after initial implementation?

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2022 PLAN

To realize our vision and achieve our goals, the team will work together on the following initiatives in 2022.

PEOPLE

Intentionally create our ideal culture
- Culture definition and change
- EDI

Establish clear and compelling career paths
- Compensation
- Growth and development

Improve the employee experience: recruitment, orientation and retention
- Equitable recruitment and hiring
- Orientation
- Staff technology experience
- Remote work strategy

Facilitate two-way employee communication
- Organizational communication

PATIENTS

Make clinical work better for patients and easier for staff
- Epic optimization
- Visit efficiency
- Clinical safety

Optimize patient access to care
- Patient call center improvements
- Patient digital experience
- Supply and demand matching

Deepen behavioral health integration
- Expanded behavioral health capacity
- Integrate behavioral health
- Address need for psych services

Design proactive patient care coordination efforts
- Patient outcome panel support (POPS)
- Preventive care
- Chronic care

COMMUNITY

Actively manage relationships and partnerships
- Community partnership program

Initiate programs that positively influence social determinants of health
- SDOH program
- Internal engagement efforts

Promote bi-directional communications through patient engagement
- Patient advisory board
- Consumer/Patient board of director's membership

Expand awareness and understanding of Neighborcare
- Marketing communications campaign

STEWARDSHIP

Improve operational and organizational efficiency
- Mature project management capabilities

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View project details >

BUILDING PMT INTO OUR 3-YEAR STRATEGIC PLAN

Our strategic plan identified several key pillars to our success and the PMT was aligned under Financial Stewardship.

Improve operational and organizational efficiency

Establish Project Management Team (PMT)
- Structure
- Aggregating org-wide projects
- Implement effective change management

*In collaboration with initiatives in the Patient and People pillars

*In collaboration with initiatives in the People pillar