

Practical Project Management

Presented by: Roberta MacDonald
Senior Manager
MUSE International 2007



HEALTHCARE MANAGEMENT CONSULTANTS

IT and Health Care: Current State

- IT Projects are changing from a well defined event to a complex, ongoing process
- Projects are larger than we are used to, and have more complexity : integration, number of components, workflow or processes impact
- Increased amount of change in organizations
- Heightened pressure to “prove” that value was achieved
- Increased complexity of IT Infrastructure and application portfolios
- Decreased tolerance for performance problems



Pitfalls of *NOT* Using Project Management Tools

- Excessive workload for individuals
- Cost overruns
- Team members lack appropriate skills, or expertise
- Scope of the project keeps changing
- Deadlines are missed
- Work is redone, or duplicated
- Resources are insufficient
- Project goals are not met
- Project failure

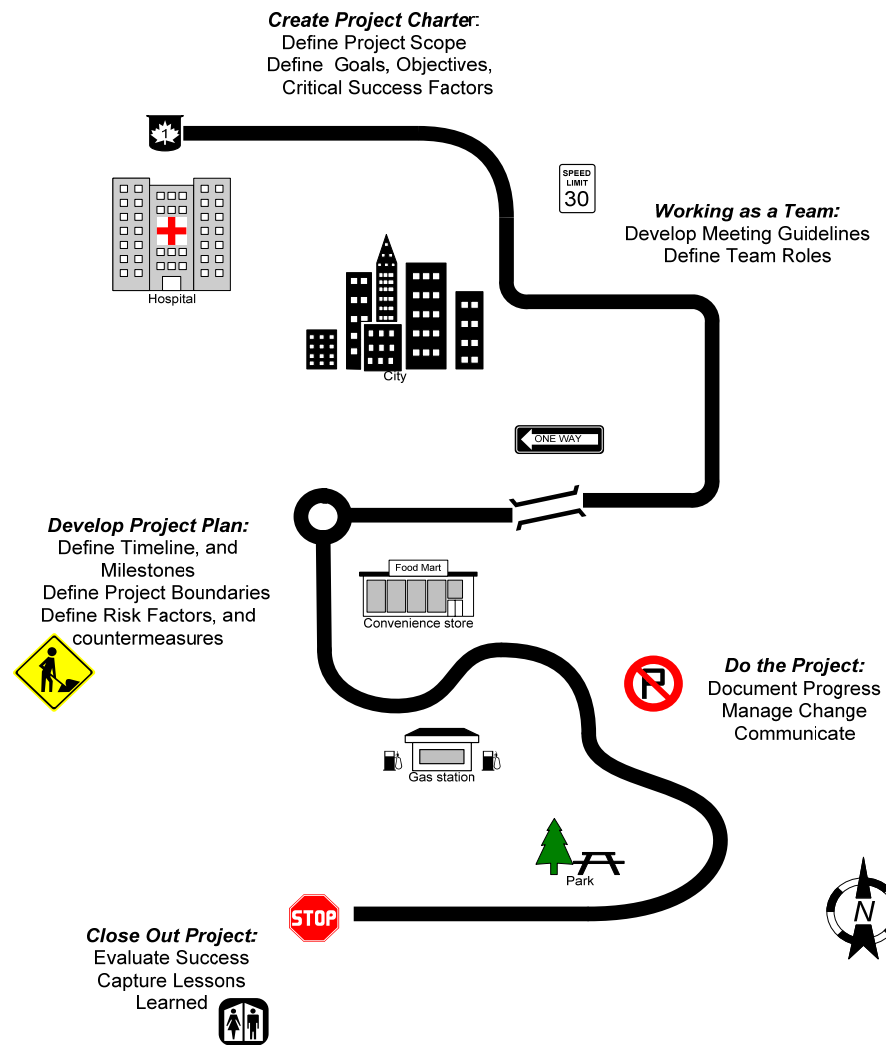


Key Terms

- Deliverables
- Project Scope
- Resources
- Risks
- Sponsor
- Timeline/milestones



Project Road Map



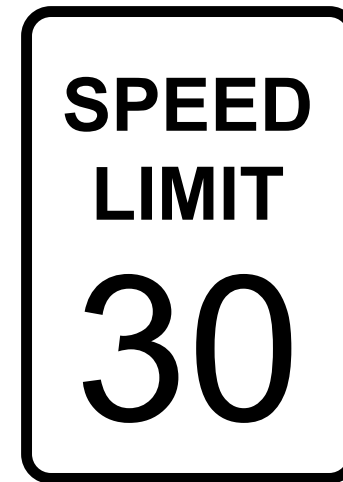
Create Project Charter

- Conveys the purpose, and requirements of the project: ***who, what, where***
- Identify key stakeholders, who is responsible for review and approval
- Get sign off!
- Define the deliverables: what does the customer need?
- Define risks, constraints, assumptions
- Define completion criteria
- Define approach, and resources required for sustainability



Team Building

- Assign a skilled project manager
- Clearly define, and recruit for the appropriate skill set(s)
- Clearly define roles, responsibilities
- Set ground rules, and group norms
- Maintain a task list with responsibilities defined
- Document meetings and decisions
- Define how meetings will be managed, conducted, scheduled
- *Have fun!*



The Project Plan

- Define the project boundaries – how do you know when you are “done”
- Recognize need to identify and plan for all life cycle stages
- Define acceptance criteria
- Clearly identify both risk, and mitigation strategies
- Establish a Communications Plan
- Establish a Change Management Plan
- Clearly document current, and future workflow
- Create a Statement of Work



Do the Project

- Document: Tasks, Decisions, Changes!!
- Monitor progress, adjust timelines
- Identify new issues
- Formalize Change Process
- Continue to monitor changes to workflow, processes
- Do you have the right skill set??



Close Out the Project

- Evaluate: success of the project AND your project methodology
- Capture lessons learned
- Get feedback from the key stakeholders and “customers”



Project Charter

Project Definition

Project Purpose:

Project Goals

Critical Success Factors

Product Definition

Deliverables

Key Interim Deliverables

Project Scope

In Scope	Out of Scope

Project Objectives

Schedule

Budget

Other

Known Constraints

Resource Constraints

Budget Constraints

Other Constraints

Beginning Assumptions

Risk Assessment

Category/Risk Factor	Probability (H/M/L)	Impact (H/M/L)
Schedule Risk		
Budget Risk		
Technical Risk		

Project Planning Team

Name	Department/Extension

Organizations/Departments Involved in Project Execution

Name	Department/Extension

Project Stakeholders

Name	Department/Extension

User/Client Responsibilities

Completion Criteria

Sign-off

Role	Name	Signature	Date
Project Sponsor			



Task List

Task	Responsibility	Timeline	Status/Comments
Integration			
MEDITECH Issues			
Hardware			
Team Documents			

Statement of Work

ID	Deliverable	Description
Phase 3: Current State Analysis	SWOT Analysis Status Reports Current State Analysis Section, Draft Report	<p>Interviews with Applications Support Staff, Operations Support staff, Service Manager, Client Interface, Project Planning, Infrastructure Manager, Security Management, Manager Architecture and Standards</p> <p>Interviews with selected clients</p> <p>Site visits to both data centers to specifically review actual procedures, operations processes, practices, and to focus on identified areas of focus requiring more information (eg. Storage volumes, network traffic patterns etc)</p> <p>Review of human resource utilization:</p> <ul style="list-style-type: none"> • skills analysis; • skill set needs definition; • division of labour. <p>Compile the SWOT Analysis, and initiate the Current State Analysis Section of the Draft Report by:</p> <ul style="list-style-type: none"> • Combining elements from written documentation, and baseline data collection, data collected from data centre visits, and interviews conducted with staff members to; • Data from the review of technical infrastructure will be compared to technology and security standards presently in use.; • Review of documented processes and practices, and match their effectiveness with the IT directions being used to implement them.
Responsibility:		Title: Project Manager: Technical Lead: Technical Personal: Business Intelligence Lead:
Timeline Estimates:		100 hours
Distribution of Work:		Project Manager: Review Human Resource Utilization, Compile the SWOT analysis Technical Lead: Conduct technical interviews, and co-ordinated site visits, Human Resource Utilization Technical Personal: Site visit reviews, technical operations review, system configuration and functionality review Business Intelligence Lead: Client Interviews, Client Interface interviews.



Risk Mitigation Matrix

Risk Item : 1. Loss of Data Integrity				
Risk Owner	Priority	Probability	Risk Category	Date
Health Records, Information Technology	High	Low	High	January 5, 2007
Risk Statement				
<p>Condition:</p> <ul style="list-style-type: none"> A full suite of Privacy and Security standards are not currently in place to support the introduction and monitoring of the scripting tool and there is a risk that these will not be in place before deployment commences. <p>Consequence:</p> <ul style="list-style-type: none"> Users, and/or technical staff would be unsure of steps necessary for privacy and security compliance Patient information may be inaccurate or incomplete resulting in patient safety issues <p>Context:</p> <ul style="list-style-type: none"> Standards are needed which will conform to PHIPA privacy standards as mandated by the Province of Ontario. Data accuracy is required for appropriate patient treatment. 				
Potential Impact				
<p>Impact:</p> <ul style="list-style-type: none"> Complete evaluation of existing security polices, procedures, and architecture will be necessary if security is not addressed prior to deployment 				
Approach:				
<p>Mitigate:</p> <ul style="list-style-type: none"> Establish clear standards based upon ISO17799 and TSSIT 				
Actions to be Taken:				
<ul style="list-style-type: none"> Establish a security advisory panel Establish a security policy map Establish clear standards based upon ISO 17799 and TSSIT Establish monitoring station as per vendor recommendation Establish internal expertise with product through participation in project development. 				
Mitigation/Contingency Plan				
<p>Contingencies will be included in the work plan if and when the corresponding risks occur. Security policies and procedures will be implemented to protect personal health information against loss of integrity, and inappropriate access including access restriction to Biztalk, and back up procedures that do not leave patient information unprotected. . A monitoring process, and procedure will be developed, and implemented. Penetration testing and/or technical vulnerability testing will be recommended.</p>				

Questions?



Thank You

Roberta MacDonald
rmacdonald@beaconpartners.com



HEALTHCARE MANAGEMENT CONSULTANTS