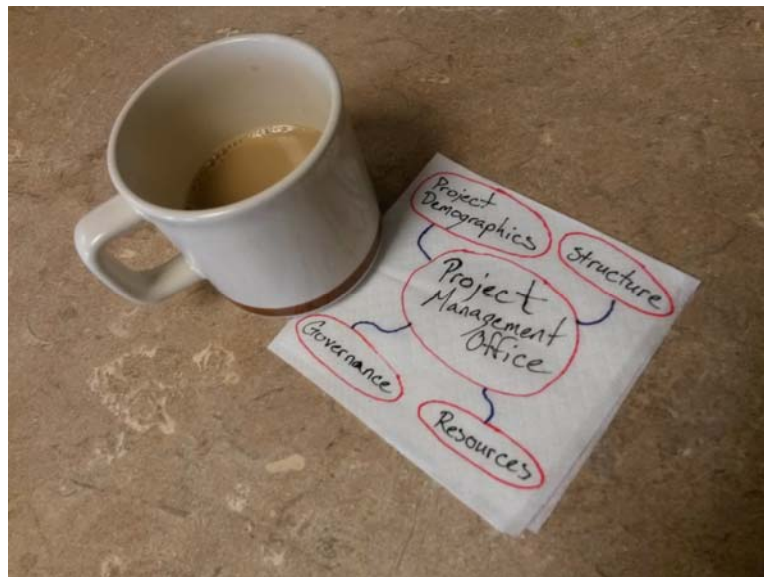
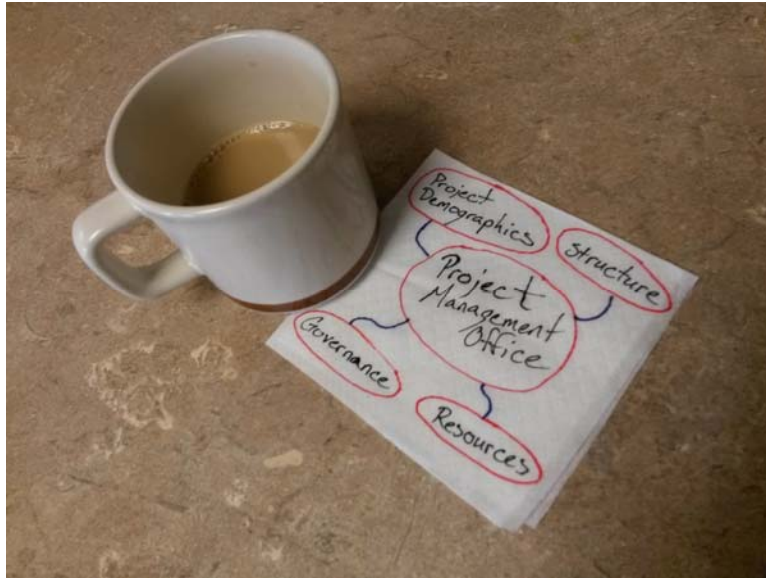


Project Management Panel



INTRODUCTIONS OF PANELISTS


Jennifer Baguisa

- Approaching 15 years in IT Project Management
- Project Management Professional since 2007
- Business background is Life Insurance
- New to the role at Froedtert, July 2014
- First time in Healthcare
 - Deloitte – 8 years total, all in PM/PMO role
 - Allstate – 10 years total, split between business and IT
- Focused on people, communication, customer service
- Prefer a PM role be seen as trusted advisor




Our Hospitals

Froedtert & MEDICAL COLLEGE of WISCONSIN
Froedtert Hospital






Licensed Beds	655 Beds
Staffed Beds	500 Beds
Admissions	26,186
Outpatient Visits	713,487
Active Medical Staff	831
Board Certified	761
Advance Practice Providers	256

Froedtert & MEDICAL COLLEGE of WISCONSIN
Community Memorial Hospital




Licensed Beds	235 Beds
Staffed Beds	202 Beds
Admissions	8,741
Outpatient Visits	95,989
Active Medical Staff	188
Board Certified	182
Advance Practice Providers	124

Froedtert & MEDICAL COLLEGE of WISCONSIN
St. Joseph's Hospital

Licensed Beds	70 Beds
Staffed Beds	70 Beds
Admissions	3,479
Outpatient Visits	77,024
Active Medical Staff	58
Board Certified	57
Advance Practice Providers	71

Our Clinics and Our Affiliation with the Medical College of Wisconsin



Community Physicians



Locations	25
Physician Clinic Visits	695,055
Physicians	
Employed	210
Contracted	296
Advance Practice Providers	
Employed	37
Contracted	59

- Froedtert Hospital is the major teaching affiliate of the Medical College of Wisconsin (the "Medical College")
 - A majority of Froedtert Hospital's medical staff is comprised of Medical College faculty members (773 faculty)
 - 326 full-time equivalent residents at Froedtert Hospital
 - 413 medical students
- Close working affiliation between the two organizations
 - Froedtert Hospital and the Medical College jointly operate and own a network of clinical sites for primary care and outpatient clinical initiatives
- Froedtert Hospital is utilized in the Medical College's residency programs in:

Anesthesiology	Vascular Surgery	Cardiology
Dermatology	Diagnostic Radiology	Emergency Medicine
Endocrinology	Gastroenterology	General Surgery
Geriatric Psychiatry	Geriatrics	Hematology/Oncology
Infectious Disease	Internal Medicine	Medicine-Geriatrics
Medicine-Pediatrics	Radiation Oncology	Nephrology
Neurosurgery	Neurology	Nuclear Medicine
Obstetrics/Gynecology	Ophthalmology	Oral/Maxillo Surgery
Orthopedic Surgery	Otolaryngology	Palliative Care
Pathology	Phys Medicine/Rehab	Plastic Surgery
Psychiatry	Pulmonary/Crit Care Med	Rheumatology
Urology		



PMO Structure

- The Froedtert PMO is currently an IT function
- Reports to the Executive Director, IT Business Affairs and Strategic Planning who reports to the CIO
- Staffing includes:
 - One supervisor
 - 17 project managers - includes PM's for the EMR program
 - Support from one analyst and one process coordinator
- Utilizes SharePoint, MS Project and Project Server for PPM
- Facilitates/enables the IT Governance process
- Assists in resource availability and planning



Shannon Schroeder

- 19 years as a healthcare professional
- 16 years focused on healthcare IT project management:
 - Dean Health System: 5 years, Administration/Project Management
 - Bedrock Consulting: 4 years, VP of Project Management
 - UW Health: 7 years
- Previous business owner: Custom Colors Aviation
- Certified Project Management Professional
- Wife, mother of 2 daughters, girls scout troop leader

University of Wisconsin Health



University of Wisconsin Health

Academic Health Center of University of Wisconsin:

- UW School of Medicine and Public Health
- UW Hospital and Clinics
- UW Medical Foundation
- American Family Children's Hospital
- UW Carbone Cancer Center
- 51 Clinical Locations in South Central Wisconsin
- Unity Health Insurance

Statistics:

- UW Hospital: 592 beds
- American Family Children's Hospital: 87 beds
- Organizational Sites: 110
- Clinic Visits: 3.3 million
- Staff physicians: 1,352
- House staff (residents/fellows): 580
- Employees: 10,500

PMO Structure

- The UW Health PMO is an IS function
- Reports to the Chief Technology Office
- Staffing model:
 - PMO Director
 - 10 Project Managers
 - 4 PMs funded by non-IS departments
 - 1 Technical Writer
 - 3 Administrative Assistants
- Leveraging ServiceNow for our PPM solution
- Facilitates/enables the IS Governance process
- Assists in resource availability and planning

Linda Seubert

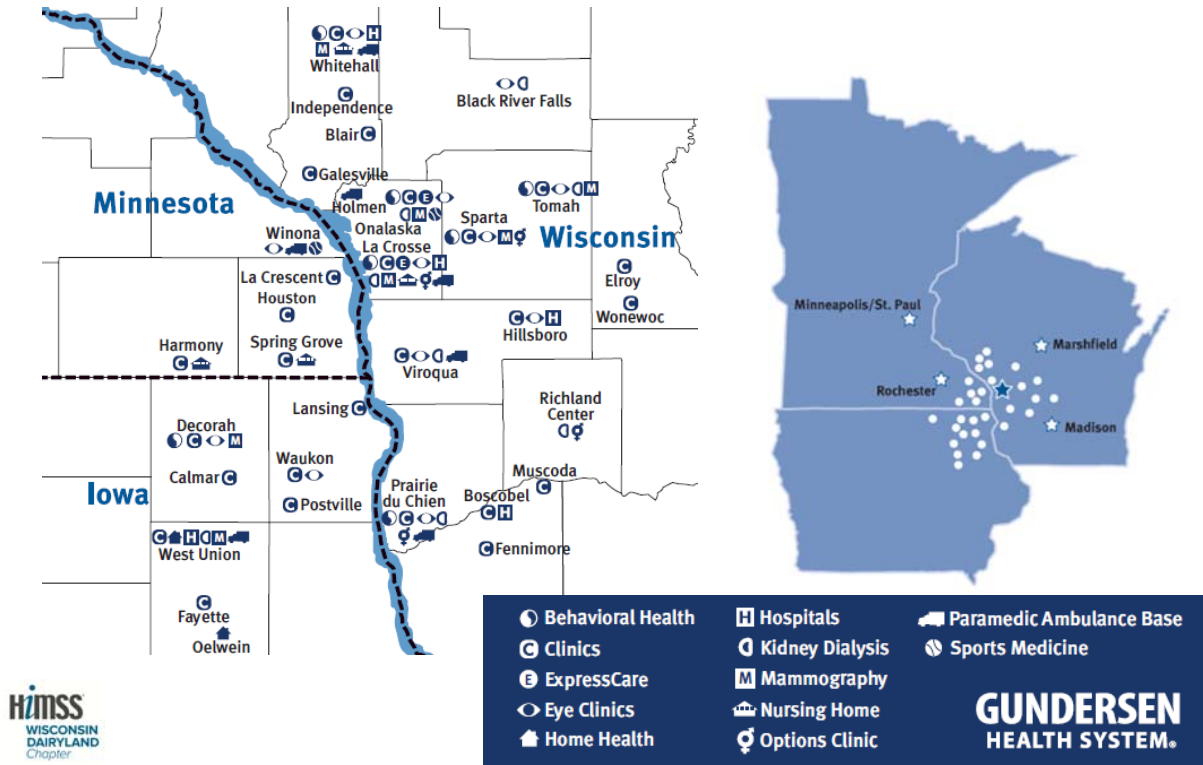
- 15+ years in IT Project Management
 - Lead implementation of EHR for both inpatient (2007) and outpatient (2010)
 - Lead development of the current tool we utilize for tracking projects
- Masters certificate in project management and a member of American Academy of Project Management
- Business and educational background is in information systems and business administration
- Currently Director of Information Security
 - manage all security-related initiatives

About us...

- Integrated Delivery System
 - Approximately 6,500 Total Employees
 - 795 providers employed / 505 medical staff
 - 59 clinic locations
 - 325-bed Tertiary Medical Center
 - 3 Regional Hospitals
- Western Campus of the University of Wisconsin Medical School
- Residency and Medical Education Programs
- Many affiliate organizations including EMS air and ground ambulance service, rural hospitals, nursing homes, hospice, etc.
- Physician-led organization
- Strong Administrative/Medical partnership



Our Service Area

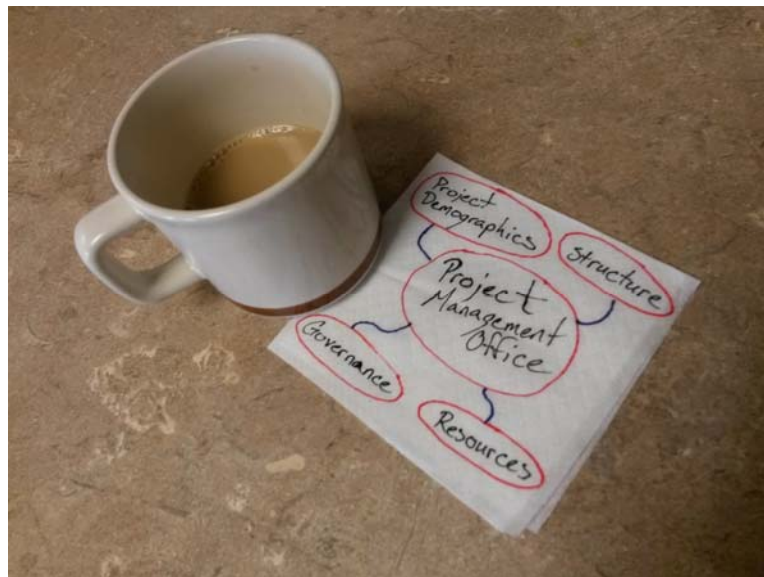


PMO Structure

- Virtual PMO office
 - Project Managers across the enterprise
- Utilize an internally developed tool to manage all projects
- Projects start at 10 IT hours, or a need for resources across multiple departments
- Facilitates/enables the Executive Leadership and IT Governance process
- Assists in resource availability and planning across organization

Gundersen Resources

- 3 IS Project Managers
 - Organizational
 - Facilities
 - EPIC EHR
 - Project Leads assignment/stretch assignments
- 5 Facilities Project Managers
- 4 Efficiency Project Managers
- 4 Quality Improvement Specialists



PROJECT DEMOGRAPHICS

Project Demographics

- Gundersen Health has an interdisciplinary approach to project management
- Weekly review of projects submitted based on strategic alignment, compliance, quality, IS and overall impact to organization as well as resource allocation
- Bi-weekly review of projects which have approval and are ready for capital spending

Project Demographics

- Utilize An on-line tool that is used to enter the following projects:
 - Capital Requests (large and small capital)
 - Projects that require human resources but no capital dollars
 - Projects that require human resources as well as capital dollars
- The purpose of entering projects into intake:
 - System management of capital dollar allocation
 - Assists in prioritizing projects as well as allocating an accurate number of human resources to successfully implement the project within the agreed upon timeline
 - Assists in interdisciplinary resource allocation i.e. Information systems, facilities, operations, etc
 - Aligns project with key strategies on the organizational strategic plan
 - There is a 'strategic' check box under project type – projects that are over 2million and/or impact a significant number of departments/patients/staff qualify as a strategic project
 - A single project may have multiple project type checked boxes
 - Once entered into intake and information has been entered and moved through the phases the final approval rests with the Senior Vice Presidents

Screenshot of New Project

GUNDERSEN HEALTH SYSTEM Project Intake - New Project

Home Reports Help

Enter new project information here.

Project Name:

Accounting Unit:

KS:

Project Purpose and Background: What are you trying to accomplish? Your project purpose should be encompassing and fairly global and should be written to include all aspects of your project. It should provide overall direction for exact terms. Also, include how this project applies to the chosen KS. 1000 Character Limit

Risk/Consequences: Describe here what the consequences/risks are of not doing the project. 1000 Character Limit

Estimated Start Date:

Estimated End Date:

Process Owner:

Sponsor: A sponsor can be a VP, Chief, or Team 4-4 Executive Director or Director.

Project Manager: Please choose one project manager at this time. You can add more later if needed. [Choose Manager](#)

Priority:

1. Critical and must purchase or replace; significantly impacts patient care or quality and will delay ability to provide current or new services

2. Can delay but will need to do eventually, alternate equipment is available to provide care; risks include delays in service, increased repairs, postponing new services

3. Request could be delayed, other reliable equipment is available or request is for cutting edge or new technology; no risk of service delay or substandard quality

Cost Estimates

	Capital Budget	Operational Budget
Const/Bldg Modification	<input type="text"/>	<input type="text"/>
Medical	<input type="text"/>	<input type="text"/>
Non-Medical	<input type="text"/>	<input type="text"/>
IS	<input type="text"/>	<input type="text"/>
Total	<input type="text"/>	<input type="text"/>

Project Includes (Please select one or more options):

Information Systems	Equipment	Facilities	Process/Systems
<input type="checkbox"/> IS Equipment	<input type="checkbox"/> Furniture and Equipment	<input type="checkbox"/> Move	<input type="checkbox"/> Strategic
<input type="checkbox"/> Software Purchase		<input type="checkbox"/> Construction	<input type="checkbox"/> Improvement
<input type="checkbox"/> Software Develop/Enhance			

Save Cancel

Current Project Statistics

Committee Approval

Large Capital Review

- CCC Planning Approval (39)
- CCC Final Review Approval (2)
- CCC Active Review (62)

Information Systems Review

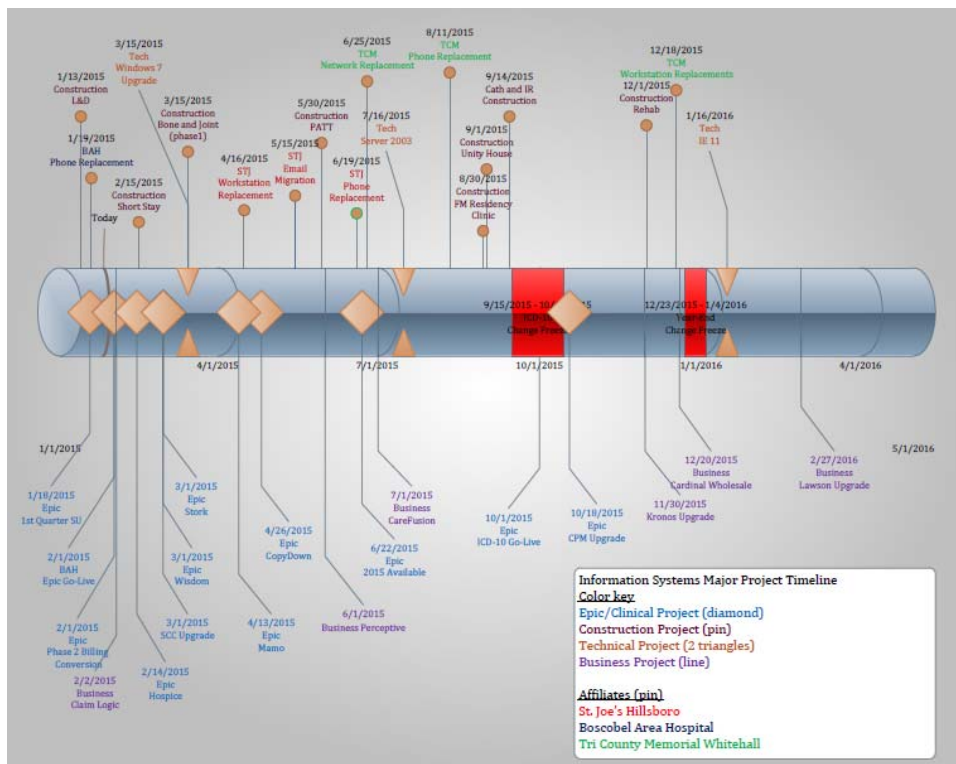
- IS Infra/Maintenance Draft (14)
- IS Infra/Maintenance Planning (9)
- IS Infra/Maintenance Active (231)

Strategic/Admin Review

- Yellow Box Review (58)
- Administration - Strategic Approval (10)
- State Completed - Active Projects (7)

Facility Review

- Move Only (7)
- Non-Capital Remodel (5)



Project Demographics

- Projects start at 80 IT hours
- Includes both IT specific such as a software upgrade
- Includes large projects with an IT component
- Historically completed about 100 projects a year
- 130 Approved Projects
- 80+ Active projects currently
- Regular portfolio review including incoming project pipeline
- Manage project as planned (FY) and “Off-cycle”

Project Demographics

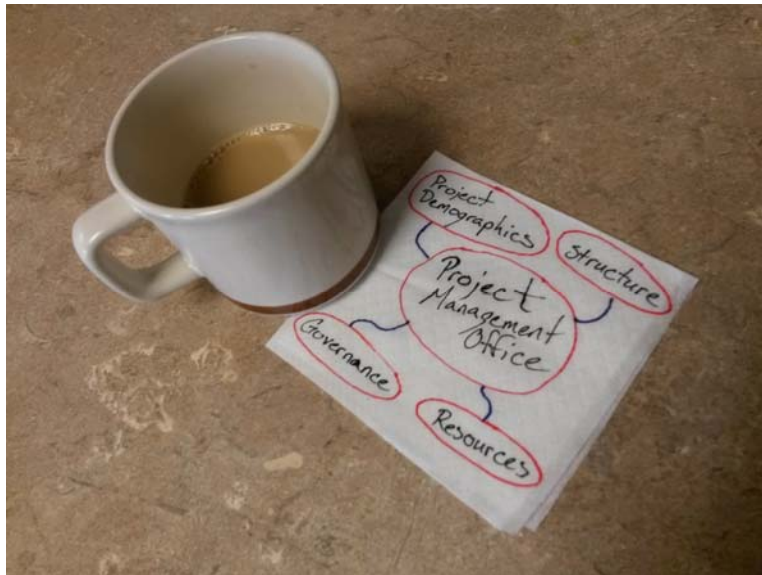
- UW Health Information Services has implemented an IS governance model to align IS resource deployment with our organization goals.
- IS Governance Committees review projects based on their strategic alignment, compliance/regulatory requirements and overall impact.
- The IS Systems Plan is approved and prioritized based on 6 month durations.

Current Project Statistics:

Approved Projects: 244 Total	Project Pending Approval: 85 Total
Pending: 66	Estimation: 53
Work in Progress: 178	Requested: 32

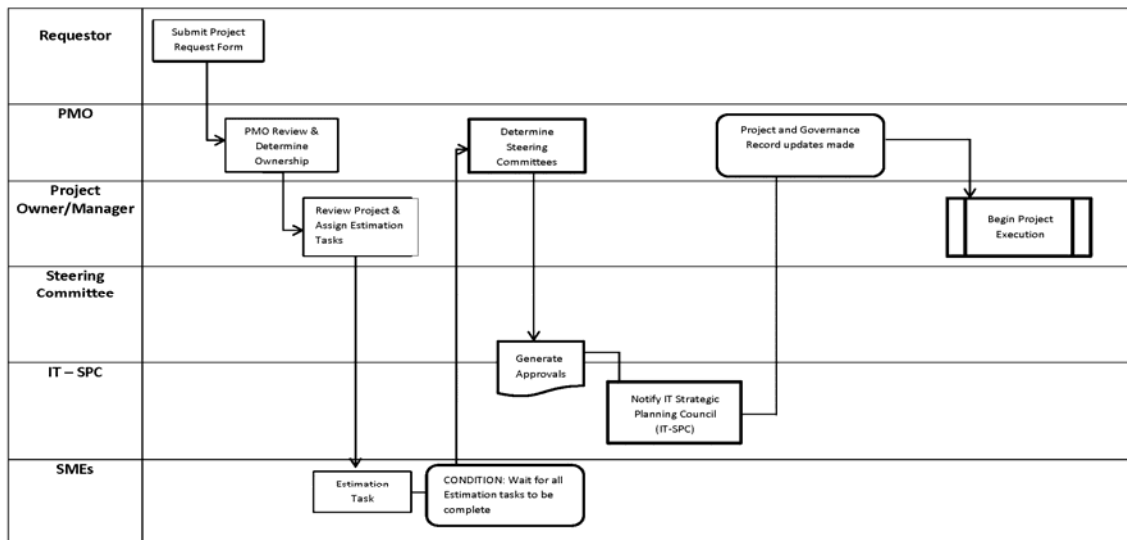
Project Demographics

- IS Projects are classified as initiatives:
 - >40 IS hours
 - Require multiple teams and approvals (clinical, fiscal, operations, etc)
 - Capital budget dollars
 - Unique deliverable which requires analysis and requirement gathering (new process, HW, SW, change to existing workflow)
- Formal IS Project Management is provided for “Defined Enterprise IS projects” which require a concentrated focus on communication, coordination, and collaboration and have the following attributes:
 - Multi-organizational
 - Multiple stakeholders
 - High Strategic Focus



GOVERNANCE

IS Governance Workflow



Governance

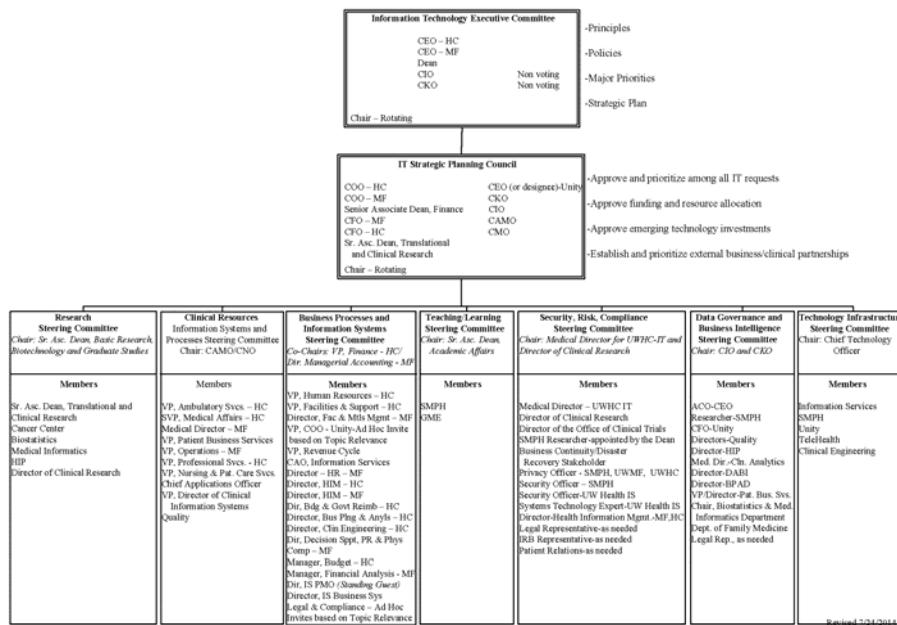
- All project requests are reviewed by the IS Project Management Office (PMO) to validate the portfolio, verify request completeness and determine ownership.
- The owning team determines and assigns the additional teams needed to support the project request.
- All teams complete effort estimations based on the information contained in the project request.
- The PMO determines approval needs based on estimations.

Project Approval Types:

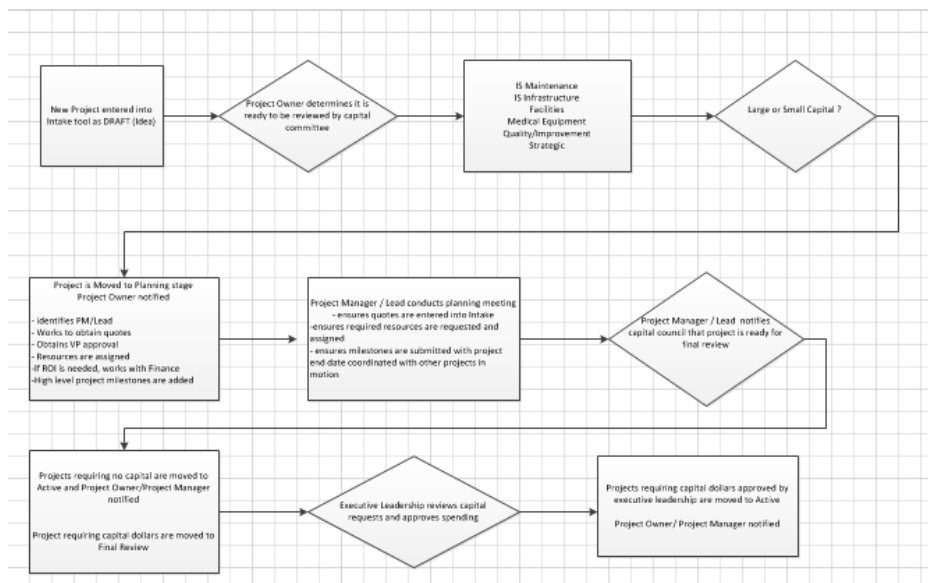
- **OCIO Approvals:**
 - Request requires a small amount of effort (<100 hrs)
 - Request only requires the owning team to complete
 - The owning team has available hours to support the request
 - All OCIO approvals go to the appropriate governance committee as “informational”
- **Governance Approvals:**
 - Request requires more than one team to support request
 - Project hours are not available – steering will need to approve and prioritize

IS Governance Structure

UW Health IT and Informatics Governance Structure



Governance Workflow

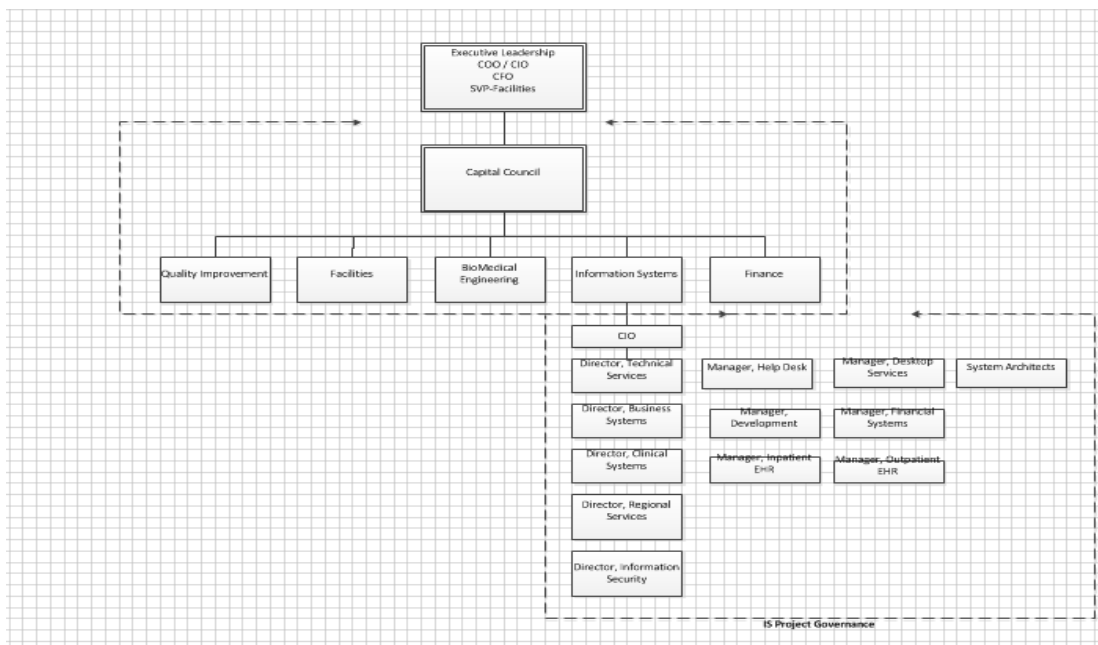


IS Project Governance

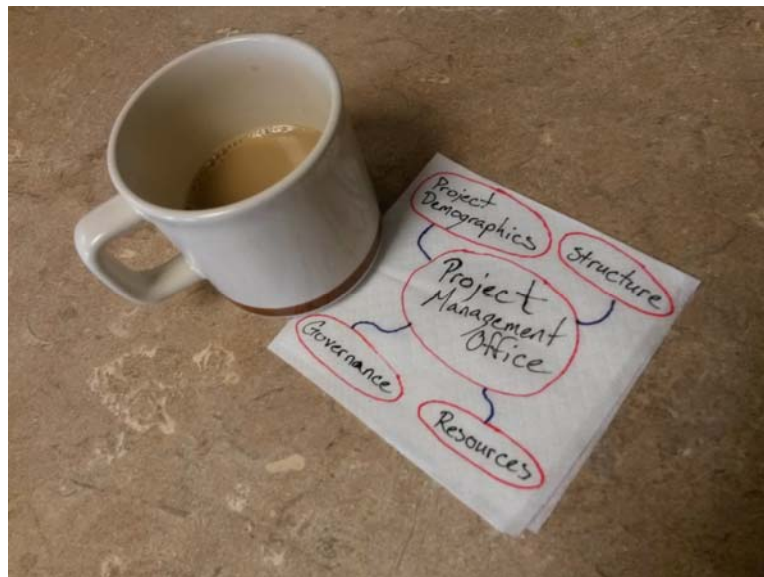
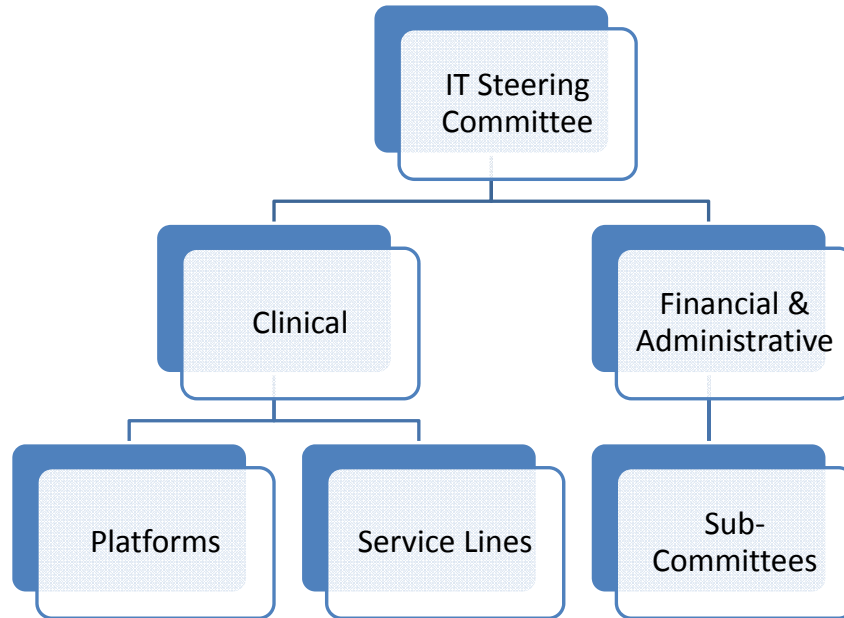
IS Projects are classified as follows:

- >10 IS hours or more than one resource/department involvement.
- Capital budget dollars
- Requires multiple resources/department involvement for implementation
- Projects are reviewed weekly; formal IS project management includes a review of milestones, resources required, capital dollars available and coordination of existing timelines prior to approving and activating a project.

Governance Structure



IT Governance Structure



RESOURCE ALLOCATION

Resource Allocation

- 25-30% of resource time is dedicated to project work
- The PMO works with the resource managers and governance committees to keep a balanced project portfolio (*project work effort = resource availability*)
- The PMO owns the time tracking system and reporting for all IT work efforts (not just project work)
- Resource managers assign resources to projects
- Projects are approved and prioritized on an annual planning basis to align with funding/budgets
- If an off-cycle project is approved, governance will determine which project(s) will be put on hold or if additional contracted resources are needed

Resource Allocation

- 30-40% of resource time is dedicated to project work
- The PMO works with the functional managers and governance committees to keep a balanced project portfolio (*project work effort = resource availability*)
- Functional managers assign resources to projects
- If a project is approved and resources are fully allocated, governance will determine which project(s) will be put on hold or if additional contracted resources are needed

Resource Allocation

- 30-40% of each FTE is allocated for project work
- Functional managers assign resources to projects
- FTEs assigned to projects are responsible for keeping their work current in the project portfolio
- The Project Manager/Lead is responsible for reporting on status of project
- Review of projects in motion, resources allocation, and pending new projects is conducted routinely to re-prioritize as needed