



IT STRATEGIC PLAN ENGAGEMENT APPROACH, DELIVERABLES AND TIMING

This engagement entails the development of two key deliverables:

- An assessment of the current IT function and its support for the business (people, process and technology) to include:
 - Information Technology (IT) Planning & Governance
 - Application Portfolio & Utilization
 - User Satisfaction
 - Clinical Application Readiness
 - Physician Readiness
 - IS Department Operations
 - IT Staffing

- A strategy for IT and supporting action plan that will provide a blue print for supporting the organization's future IT initiatives.

Outlined below are the key engagement activities to support the development of the deliverables:

Step 1 - Initiate Project (Weeks: 1-2)

QHR will work with the organization's executive team to finalize the project goals, organization, participants, establish expected outcomes and deliverables and identify special areas of focus (eg: achievement of meaningful use, IT solutions and support of rural clinics and community physicians, etc.)

Major Tasks include:

- Confirm expected outcomes
- Identify special areas of focus
- Confirm participants and main contact
- Establish project milestones and briefing session schedules
- Obtain existing information regarding: organization strategic plan, IT plans, applications, technology infrastructure, policies/procedures, IT staffing, etc.
- Review background information
- Schedule on-site visit to meet with senior management team, and other designated participants:
 - Individual executive / clinician interviews
 - Individual Department Manager interviews
 - Clinic Manager and provider interviews

Step 1 - Deliverables

- Project schedule
- Interview participants identified and scheduled
- On-site visit schedule

Step 2 - Assess Current IT Environment (Weeks: 3-6)

The consultant will assess the current state of IT at the facility, reviewing and validating relevant documentation, application portfolios and operations model to develop an understanding of the current environment. The consultant will provide comparisons to other healthcare organizations of similar scale and market with respect to applications coverage, IT strategy and staffing levels for application portfolio/complexity supported. The following IT dimensions will be assessed.

- IT Governance
 - IT Strategic planning
 - Governance and policy
 - Future focus and regulatory compliance
- IT Operations
 - Operations management
 - Security and disaster planning
 - Staffing, skills, staff development and organizational leadership
 - Audit, controls, change management and other key IT processes
- IT Utilization
 - Application utilization
 - Application support
 - User satisfaction
 - Clinical application readiness
 - Gap analysis

Major Tasks include:

- Conduct IT interviews and perform IT Assessment (areas listed above)
- Perform cursory review of system use and assess the effectiveness of current systems utilization; compare application and technology portfolio relative to other similar facilities; comment on quality of specific vendor applications relative to industry norms
- Identify gaps and formulate recommendations
- Facilitate an Executive Briefing Session to:
 - Provide education on the state of the healthcare IT market and highlight innovative best practices
 - Provide education on 'meaningful use' and where the organization stands in achieving criteria
 - Present current state assessment

Step 2 - Deliverables

- Assessment of current IT environment
- Healthcare IT marketplace and 'meaningful use' education materials
- Initial findings and recommendations

Step 3 - Develop IT Strategic Plan and Action Plan (Weeks: 7-10)

To develop the IT strategy, the consultant will present options and work with the senior management team to develop an IT governance model, over-arching guiding principles for IT (such as standardization, best-of-breed vs. core systems, project ownership, sourcing strategy, etc), and overall standards and guidelines. Then, the consultant will develop a sequence for the implementation of key IT initiatives, that is create a “roadmap” based on the IT strategy; taking into consideration business and clinical priorities, process change, political landscape, and constraints, such as capital and resources.

The outcome of this final step will be a framework and action plan that will guide executive decision making related to IT and how/what business and clinical goals will be supported by technology initiatives.

Major Tasks include:

- Facilitate an Executive Briefing Session to:
 - Develop over-arching strategies for IT governance, guiding principles and overall standards
 - Develop IS department staffing model
 - Develop priorities for key IT initiatives and projects
- Develop high-level, multi-year year action plan for high priority initiatives (brief project description, timing, high-level cost estimates if possible)

Step 3 - Deliverables

- Recommendations and migration strategy
- Sequence of initiatives based on timing and dependencies (3-4 year plan)
- IT Strategic Plan and Action Plan