



**National Health Care Reform
Transition Planning:
Continuation of
Project Management
Assistance**

(VOTE)

**Kaitlyn Kenney
Director of Policy & Research and
National Health Care Reform
Coordinator**

**Roni Mansur,
Chief Operating Officer**

**Board of Directors Meeting
February 23, 2012**



Agenda

- Background
- Overview of Phase 1 Deliverables
- Need for Continued Project Management Support
- Proposed Phase 2 Scope of Work
- Key Terms
- Recommendation (VOTE)



Background

- Request for Proposals (RFP) for project management assistance issued in fall 2011
 - Initial Scope of Services (Phase 1)
 - Conduct a multi-component current-state assessment and recommend transition governance model
 - Establish a Project Management Office (PMO)
 - Develop a “Health Connector 2.0” roadmap
 - Subsequent Scope of Services (Phase 2)*
 - Maintenance and facilitation of the transition governance model
 - Execution and operation of the PMO
 - Support of the “Health Connector 2.0” roadmap

**All bidders were required to bid on the scope of services identified here as “Phase 2”. The RFP indicated, however, that the Health Connector would choose, at its sole discretion, whether it would continue the engagement with the selected vendor to perform Phase 2 upon completion of Phase 1 deliverables.*



Background (cont'd)

- Contract term
 - November 2011–June 2012
 - Optional two one-year renewals at the sole discretion of the Health Connector
- Board review and approval
 - Board approved the Health Connector's recommendation to contract with Deloitte for project management assistance on November 10, 2011
 - Staff indicated an intention to return to the Board, if staff proposed continuing to work with Deloitte for Phase 2 of the engagement



Phase 1 Deliverables

Deloitte has successfully completed all deliverables required under Phase 1 of this engagement

- Multi-component current state assessment
 - Performed a gap analysis considering current Health Connector business policies and practices and ACA-required Exchange functions
 - Evaluated existing transition planning structure
 - Reviewed existing project management practices and capabilities



Phase 1 Deliverables (cont'd)

- Multi-component current-state assessment findings revealed need to:
 - Augment existing workgroups to ensure all functional areas addressed
 - Enhance clarity of workgroup charters and expected deliverables
 - Foster greater coordination across workgroups
 - Introduce and support utilization of project management templates and tracking tools
 - Consider how to address staff capacity challenges



Phase 1 Deliverables (cont'd)

- Recommendation for revised transition governance model
 - Matrix model approach to ensure coordination across all components of transition planning
 - Assigns mostly senior staff to lead eight business workgroups and six work threads
 - Responsibilities outlined through clear charters
 - Deliverables coordinated by integrated project plan
 - Overseen by Health Connector leadership, who will also facilitate Board engagement on key issues and decision points



Phase 1 Deliverables (cont'd)

Program Management Office (PMO) Support

Operations Transition Program Manager

Supporting Functions Transition Program Manager

Front End

Back End

Customer Service

Plan Mgt, Products, Quality

Financial Mgt. & Risk Adj.

Brokers & Navigators

Outreach & Education

Program Oversight

Business Workgroup

Technology

Resources

Finance

Policy/Legislative

External Communications



Phase 1 Deliverables (cont'd)

- Project Management Office (PMO)
 - Created standardized project management processes, tools and templates; examples include:
 - Workgroup and work thread status report
 - Workgroup options analysis summary
 - Executive dashboard report
 - Risk, issues, decisions and assumptions log
- Developed integrated project plan and roadmap
 - Outlines all activities and dependencies across workgroups and work threads
 - Highlights key milestones that must be accomplished as part of transition



Need for Continued Project Management Support

- Health Connector staff must ensure continued strong levels of service to Commonwealth Care and Commonwealth Choice members and perform other legal, policy and programmatic responsibilities while conducting transition planning activities
- Current state assessment documented concerns associated with senior staff capacity to handle both existing responsibilities and transition planning activities



Need for Continued Project Management Support (cont'd)

- Project management assistance will provide the day-to-day support necessary to effectuate the revised transition governance structure and employ project management tools
 - Will enable senior staff to dedicate appropriate time and attention to substantive policy and programmatic considerations
 - Will focus transition efforts on achieving a number of operational, technological and policy/legislative milestones within tight (often federally-defined) timeframes to ensure we are an ACA-compliant Exchange by 2014



Phase 2 Scope of Work

Consistent with the scope of services described in the initial RFP, Deloitte would be responsible for the following project management activities:

1. Operation of the Exchange transition PMO, including institutionalizing project management processes and tools and developing and disseminating necessary templates
 - Development and compilation of weekly standardized status reports for each workgroup and a weekly executive dashboard
 - Development and standardization of options analysis summary templates



Phase 2 Scope of Work (cont'd)

2. Facilitation of scheduling and other workgroup activities
 - Scheduling and coordinating weekly or bi-weekly meetings with 8 workgroups and 6 work threads as well as owners of milestones and key activities
 - Facilitating workshops to coordinate workgroup activities and the development of workgroup deliverables

3. Integration/coordination of workgroup activities
 - Manage transition progress and track it against charters and the integrated project plan (based on the Roadmap) and oversee, as necessary, updates to the integrated project plan
 - Coordinate issue resolution across workgroups, determine impacts of the dependencies on key transition program activities and milestones and incorporate updates into the integrated project plan
 - Develop and coordinate a communication calendar to ensure appropriate communication among internal workgroups and external stakeholders



Key Terms

- Terms of the Contract
 - Contract terms have not been modified since our presentation to the Board on November 10, 2011
 - The Health Connector's recommendation is to exercise our discretion in the Contract to continue our engagement with Deloitte for Phase 2 services
 - We recommend continuing this engagement with Deloitte for an additional 14 weeks (January 2012 through May 2012)



Key Terms (cont'd)

- Cost and Funding
 - Cost for the 14-week engagement: \$552,062 total
 - The Health Connector requested funding for ongoing project management assistance in our pending Level 1 Establishment Grant proposal
 - Funding opportunity announcement indicated that pre-award allowable costs that are incurred 90 days before the grant award may be reimbursed



Staff Recommendation

- Health Connector staff recommends exercising the option to continue our engagement with Deloitte for project management assistance
 - Deloitte has successfully completed all deliverables required under Phase 1 to the Health Connector's satisfaction
 - Deloitte has demonstrated experience and expertise in launching large-scale initiatives such as this
 - Executing the PMO and employing project management tools and processes will be critical to the Health Connector's ability to accomplish the breadth of milestones necessary to become an ACA-compliant Exchange by 2014