



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

(VOTE)

**Roni Mansur
Chief Operating Officer**

**Ed DeAngelo
General Counsel**

Board of Directors Meeting
May 10, 2012



Agenda

- Background
- Phase 2 Scope of Services and Accomplishments to Date
- Need for Continued Project Management Support
- Key Terms
- Recommendation (VOTE)



Background

- A Request for Proposals (RFP) for project management assistance was 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
 - On November 10, 2011, the Board approved the Health Connector's recommendation to contract with Deloitte for project management assistance (Phase 1)
 - Staff indicated an intention to return to the Board if staff proposed working with Deloitte for continued project management support (Phase 2)



Background (cont'd)

- At the February 23, 2012 Board Meeting, Health Connector staff reported Deloitte had successfully completed all deliverables required under Phase 1
- At that meeting, Health Connector staff sought Board approval to continue the engagement with Deloitte into Phase 2 of the RFP, focused on providing Health Connector staff with ongoing project management assistance to execute Phase 1 deliverables
 - The Board approved the Health Connector's recommendation to exercise this option, extending the engagement with Deloitte for an initial period of 14 weeks ending in May



Phase 2 Scope of Services and Accomplishments to Date

- Deloitte has provided high-quality project management assistance required by the Health Connector during the 14-week period ending in May 2012:
 - Implemented and operated the Exchange Transition PMO, including institutionalizing project management processes and tools and developing and disseminating necessary templates
 - Implemented a weekly status reporting process by developing and distributing weekly standardized status reports for each workgroup along with a weekly executive dashboard
 - Managed the key milestones and dependencies in the roadmap and integrated project plan
 - Continued to identify key dependencies and determined impacts of these dependencies on key transition program activities and milestones
 - Documented issues, decisions, risks, mitigation strategies and assumptions in a consolidated project management tool; facilitated the process to resolve these items
 - Developed various templates used by work groups and work threads

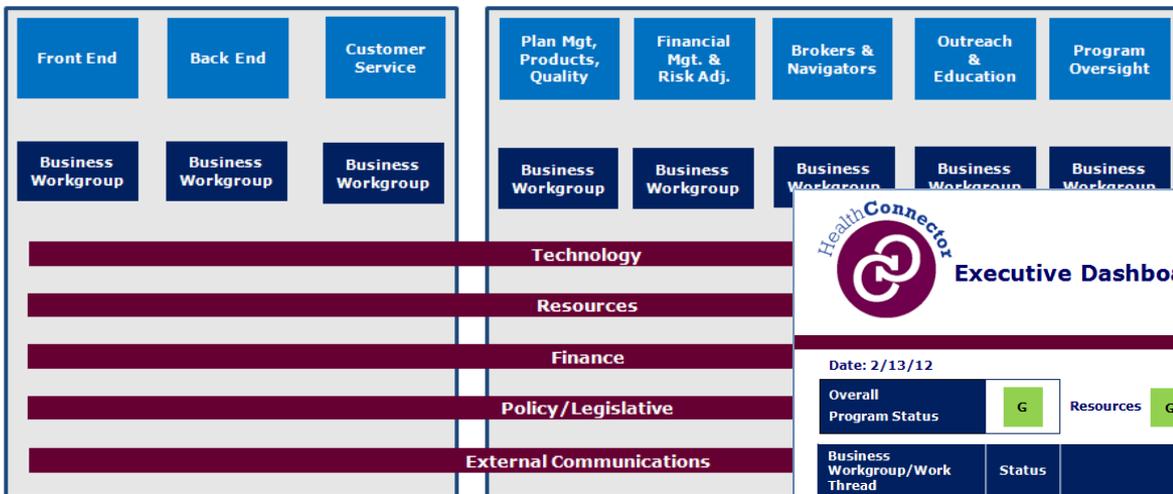


Phase 2 Scope of Services and Accomplishments to Date (cont'd)

- Facilitated working sessions, meetings and other workgroup activities
 - Scheduled and coordinated weekly meetings with 8 workgroups and 6 work threads as well as owners of milestones and key activities
 - Facilitated bi-weekly Health Connector Advisory Committee meetings
 - Facilitated workshops to coordinate workgroup activities and the development of key workgroup deliverables
- Integrated/coordinated workgroup activities
 - Managed transition progress for each workgroup by tracking completion of key activities and deliverables against charters and the integrated project plan (based on the Roadmap)
 - Coordinated issue resolution and risk management within and across workgroups
 - Developed a communication calendar to ensure appropriate communication among internal workgroups and external stakeholders
 - Developed a resource management tool to help manage internal resource allocations



Project Management Tools



Internal DRAFT



Executive Dashboard—Program Status Summary

Date: 2/13/12

Overall Program Status	G	Resources	G	Schedule	G
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Business Workgroup/Work Thread	Status	Reason for Status
Business Workgroups	Green	<ul style="list-style-type: none"> One-on-one meetings to review charters complete Front End, Back End and Plan Management process model development workshops scheduled
Business	Green	<ul style="list-style-type: none"> Milestones on track, no risks/issues identified
Technology	Green	<ul style="list-style-type: none"> One-on-one meeting to review charters complete
Resources	Green	<ul style="list-style-type: none"> Milestones on track, no risks/issues identified
Finance	Green	<ul style="list-style-type: none"> One-on-one meeting to review charter complete
Policy/ Legislative	Green	<ul style="list-style-type: none"> One-on-one meeting to review charter scheduled
External Communications	Green	<ul style="list-style-type: none"> One-on-one meeting to review charter scheduled
Federal/State/ Operational	Green	<ul style="list-style-type: none"> Milestones on track, no risks/issues identified

● On track: no major risks or issues identified
 ● Tracking behind: Risks/issues identified expected to have a moderate impact on program milestones
 ● Off Track: Risk/issues identified expected to have significant impact on the program milestones

For Policy Development



Need for Continued Project Management Support

- Health Connector staff have determined that continued project management support is needed for ongoing planning and implementation
 - Project management assistance provides the day-to-day support necessary to effectuate the revised transition governance structure and employ project management tools
 - Enables senior staff to dedicate appropriate time and attention to substantive policy and programmatic considerations related to both “Connector 1.0” and “Connector 2.0”
 - Focuses transition efforts strategically to ensure achievement of operational, technological and policy/legislative milestones within tight timeframes to ensure we are an ACA-compliant Exchange by 2014
 - *New, additional focus: will help us coordinate and execute robust engagement of external stakeholders on major policy and operational decisions*



Key Terms

- The Health Connector's recommendation is to renew the current work order with Deloitte for 16 weeks and the underlying contract for an additional year to expire on June 30, 2013
- Renewing the contract sets the general scope of services, but particular staffing levels will separately be determined in progressive work orders calibrated to evolving Health Connector needs
- The current work order, as extended, will cost approximately \$200,000 per month over the next four months; costs for future work orders will be based on the Health Connector's evolving needs
- Our engagement with Deloitte has been funded with federal Exchange Planning and Level 1 Establishment grants received by the Health Connector
 - We intend to continue to use Exchange Establishment Grant funds to pay for the extended agreement
 - The contract with Deloitte can be cancelled if needed federal grant funding is not received in full



Staff Recommendation

Health Connector staff recommends renewing the Deloitte project management assistance contract for a term expiring June 30, 2013.