

# **Workflow Analysis/Project Management Proposal for: Presbyterian Homes & Services**

## **Overview**

Presbyterian Homes & Services (PHS), a multi-facility senior housing and healthcare organization in Princeton, New Jersey, has begun an extensive project to analyze and reorganize their information workflow and their information systems. As part of this project PHS has engaged the services of Edward Koscic & Associates (EKA) for assistance in evaluating and selecting new information system solutions as well as documenting their current business processes and recommending options for automating their manual processes and improving the efficiency of their current computerized systems.

At this point in PHS's information system reorganization project, EKA has supplied PHS with a detailed Needs Analysis and collected this information in preparation for on-site presentations by qualified major information system vendors.

The next steps in PHS's information system project are to:

- Complete the evaluation and information system selection process
- Perform a workflow analysis and expand it to remaining areas of interest as necessary
- Organize and manage the tasks spanning the entire information system reorganization project

PHS has requested that Edward Koscic & Associates provide guidance and leadership in evaluating the workflow and to take charge of managing the complete information system reorganization project for the entire organization. It is with these requirements in mind that we propose the following plan.

## **Plan**

### **Workflow Analysis**

Edward Koscic & Associates will provide a workflow analysis of the day-to-day operation of the organization. Our plan is to examine in detail the business processes at the corporate office, one of the continuing care retirement facilities and one of the assisted living facilities. The facilities reviewed should be selected such that they demonstrate all the business processes of their peer facilities so that no significant functions are overlooked.

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The Workflow Analysis we propose will cover the following business processes:

1. Resident application, acceptance and associated tracking
2. Marketing software, spreadsheets, databases, etc.
3. Resident move-in, in-house transfers, and hospital transfers
4. Unit availability and refurbishment tracking
5. Skilled nursing and assisted living admission, discharge and transfer
6. SLS, MDS, any other MR applications and other "home-grown" spreadsheets
7. Daily census and other regular census reporting
8. Physician orders, care planning, charting and assessments
9. Notification and communication concerning the above areas

The Workflow Analysis will result in creation of:

1. A document describing, in detail, the day-to-day tasks performed by the facility's primary resident information gathering staff concerning resident information flow in the facility.
2. A visual representation of facility information flow and business processes using flowcharts and other written material.
3. Recommendations for modification and/or automation of processes to increase efficiency.

The benefits of the Workflow Analysis are:

1. It provides a complete and easy to understand description and view of the business practices and information flow in the facility that facilitates training of new staff, improvement of existing practices and identifies areas to potentially be automated. These benefits have both short-term and long-term effects.
2. It complements the Needs Analysis and Information System Selection processes by providing a greater level of detail necessary to assist facility staff and system vendors in properly selecting and installing the best information system solution for the facility.

### **Project Management**

Edward Koscic & Associates will provide project management services including creating the project scope documentation, the basic project plan, identifying and organizing the project team and communicating the project plan and its status to the project team.

*seperate proposal will be negotiated  
at a later date. JTM III*

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The tasks involved as part of the Project Management role will consist of:

- Expanding the detailed analysis of currently identified processes as necessary to help ensure coverage by the new information systems
- Adding analysis of processes not yet examined in detail as candidates for inclusion in the information system reorganization project
- Organizing and managing all aspects of completing the entire information system reorganization project including, but not limited to:
  - Building and organizing the project team
  - Creating and maintaining the project plan and communicating the plan to the project team and PHS staff
  - Aligning the project plan with the organization's workflow processes and the features of the new information systems
  - Developing and implementing the training and setup plans
  - Converting existing data and integrating disparate systems where applicable
  - Taking the implementation to completion and analyzing its success resulting in optimizing system utilization

The Project Management efforts will result in creation of:

- A detailed Project Master Plan showing all the steps and processes involved in the project from system selection through post-live analysis as well as the schedule for completion of the tasks and measuring progress toward achieving meaningful and measurable milestones
- A detailed Project Scope document showing all the candidates for information system reorganization to assist in prioritizing and setting the project scope
- Workflow Analysis documents including samples of currently used reports and paper forms to be integrated into the project plan and aligned with the features of the new information systems
- Additional documents as necessary to allow PHS staff to see and understand the entire information system reorganization process
- Publication of all project management materials in a universally accessible location for easy reference by the project team and PHS staff

The benefits of the Project Management work are:

- An organized and systematic approach to managing the project to ensure that nothing "falls through the cracks"

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- Efficient implementation and enhanced utilization of the new information systems as a result of all the critical pre-implementation planning
- A thorough "gap analysis" that results in prioritizing the work to obtain maximum immediate benefits and provide on-going coverage through a staged approach to implementation

### Estimates

We estimate that the time spent on the workflow analysis will be approximately 120 hours. @ \$125 per hour. *JTM III*

The Project Management role at PHS will be an on-going relationship between PHS staff and EKA throughout the course of the information system reorganization process. The project will be completed in three phases according to tasks listed in the Project Plan. The number of hours involved in completing each phase will vary and be based on the amount of work identified as being completed by PHS staff and the EKA project manager.

The initial phase of the project, known as Phase I, will consist of establishing the project team, building the project plan, continuing the workflow analysis, setting the project scope, reviewing the functionality of the new systems and completing the system selection process. It is estimated that this portion of the project plan could take up to \_\_\_ hours over the course of up to three months.

The second phase of the project, known as Phase II, will consist of the actual training, setup, conversion and integration tasks necessary to take the project to "go-live" status. The number of hours involved will depend on the scope of the project that is set during Phase I and the degree to which PHS staff and the EKA project manager are involved in completing the required tasks. It is estimated that this portion of the project could take up to six or more months following completion of Phase I and could include multiple "mini go-live" events as not all portions of the overall project need to be completed or "go-live" simultaneously. *JTM III*

The final phase of the project, known as Phase III, involves the actual "go-live" event for the primary new information system and the "post-live" analysis that will ensure optimum utilization of the new systems. This phase will also spawn new work for filling "gaps" such as completing any unfinished system integration as well as beginning work on further automation of areas not identified as critical to the success of the main information system reorganization project.

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In the event of changes in the scope of the work which exceed our estimate, we will notify you immediately so that the impact of the changes on the project can be assessed.

**Schedule**

Work will be initiated by meeting with staff at the corporate office and facilities for in-depth information gathering with the completion of the analysis and compilation of data to be conducted in our offices. Following completion of the workflow analysis, the project scope and initial plan will be created, reviewed with the project team, adjusted, expanded and synchronized with the needs analysis and workflow analysis to facilitate the system selection process. Work will commence immediately upon acceptance of this proposal and be performed in a timely manner consistent with the organization's desire to select a new information system in the second quarter of 2005.

PROPOSAL ACCEPTANCE

Presbyterian Homes & Services by:

JTM III

Title:

VP FINANCE

Date:

4/5/05