Health Systems Project Management Structure

<table>
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<tr>
<th>RFP No:</th>
<th>17-ARP002</th>
<th>Due Date</th>
<th>09/21/2016</th>
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<tbody>
<tr>
<td>Contact</td>
<td>Kelly Briseno</td>
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<tr>
<td>Date Posted</td>
<td>9/21/2016</td>
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1. Is there a specific business need or issue that University of Texas Southwestern Medical Center is attempting to address with this RFP?

This is a new project management office for Ambulatory Operations:
   1. Aid in setting up processes for the Health System project management team
   2. Review and Support project charters, plans, metrics, and deliverables
   3. Aid in improving communications with stakeholders including status reports, updates, and meetings

The Health System project management team works on projects to streamline, standardize, and improve operations in our ambulatory clinics (~60 clinics) at UT Southwestern. Metrics include improving the patient experience, quality, and margin. Specific project will be discussed with the selected consultant.

2. What is the current structure and composition of the Project Management Office? How many individual project managers are there?

There are currently 9 project managers.

3. Are the existing Project Managers at University of Texas Southwestern Medical Center centralized under an office (PMO for example) or decentralized?

This is a new centralized office for ambulatory operations.

4. Does University of Texas Southwestern Medical Center currently utilize a project management methodology? If so, are there issues or deficiencies that this RFP hopes to address?

The office is new and still in the early stages. We are looking to set up processes and best practices.
5. If a project management methodology is in place, are your project manager trained on the methodology or is it simply in use?

The office is new and still in the early stages. We are looking to set up processes and best practices.

<table>
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<tr>
<th>Question</th>
<th>Answer</th>
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<tbody>
<tr>
<td>6. Does University of Texas Southwestern Medical Center currently have a Project Management Information System in place?</td>
<td>No</td>
</tr>
<tr>
<td>7. Are there business needs specific to Ambulatory or Population Health that should be addressed with this RFP?</td>
<td>No, the projects of the PM office address these types of needs. The goal of this engagement is to help set up processes and a structure to implement these types of initiatives.</td>
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<tr>
<td>8. Are you able to elaborate on the impetus for issuing this RFP? In other words, what specifically seems to be lacking currently?</td>
<td>The office is new and still in the early stages. We are looking to set up processes and best practices.</td>
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<td>9. Are there business needs specific to Ambulatory or Population Health that should be addressed with this RFP?</td>
<td>No, the projects of the PM office address these types of needs. The goal of this engagement is to help set up processes and a structure to implement these types of initiatives.</td>
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<td>10. Is the scope focused exclusively on project management tools, etc., or do you also want the consulting firm to advise you on how to manage programs effectively (where a single program is comprised of multiple projects)?</td>
<td>The focus is on the tools, collaboration, and coordination of projects and project planning. This would include aiding in the work break down and reviewing the execution plan for issues.</td>
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<td>11. When this endeavor succeeds, what do you envision the end result to be?</td>
<td>A coordinated organized collaborative PM office that can execute projects utilizing the same tools and planning.</td>
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12. What are some of the challenges currently facing the HSPMS that led to issuing this RFP?

The office is new and still in the early stages. We are looking to set up processes and best practices.

13. What is the expected start date of this initiative? Is there an expected completion date?

The start date would be in October. The timeline of the engagement TBD.

14. Please clarify the verbiage within the RFP. In one section, it reads that the endeavor is to "aid in setting up processes" while in the deliverables section, it states the deliverable will be an "assessment." We interpret this verbiage to state that there may be both an "assess" component and a "build" component to this project. Please confirm that our understanding is correct and/or provide clarification as appropriate.

The focus is on the tools and coordination of projects and project planning. This would include aiding in the work break down and reviewing (assessing) the execution plan for issues, level of detail, and completeness.

15. As part of the proposed work, is there an expectation that we will be granted access to various customers of the services provided by the HSPMS in order to assess efficacy of the services delivered?

The office is new and still in the early stages. We are looking to set up processes and best practices. Few services are being delivered. Yes, customers could be a part of the project.

16. Per the RFP, you desire assistance in the review and support of project charters, plans, metrics, and deliverables. Could you further explain your expectation of the vendor to ‘review and support’ these artifacts? Are there other documents or is this list exhaustive?

The focus is on the tools and coordination of projects and project planning. This would include aiding in the work break down, reviewing the execution plan for issues, detail, completeness, and ensuring the communication tools, timelines, and metrics are part of the plan.

17. How many human resources (in total) are engaged on these projects? Are these resources dedicated or split between project and operational work?

There are currently 9 people in the PM office. They are dedicated to project management. In addition, there will be people in leadership and in each clinic involved.
18. How many project managers belong to the HS Project Management Structure? If feasible, please provide an organizational chart of the HSPMS. What is the mix of contractors vs. employees?

There are currently 9 people in the PM office. They are dedicated to project management. An org chart will be provided to the awarded consultant.

19. How many projects are running concurrently? Please provide a rough idea of a typical project profile, i.e. team size, approximate budget, and rough duration.

There are 10 projects. Each will last over a year and will be implemented across all 60 of the clinics.

20. Have project delivery methodologies been defined? If yes, what are they and in how much detail are they documented?

The office is new and still in the early stages. We are looking to set up processes and best practices.

21. Have there been any efforts to date to provide a formal assessment of the maturity of the HSPMS organization and/or develop a long term roadmap for maturity of the group? If yes, at a high level, what were the results?

The office is new and still in the early stages. We are looking to set up processes and best practices.

22. Is the project management team currently required to obtain any project management certifications? (e.g. PMI-PMP, Six Sigma, Prosci)

No, but many members of the team have PMP and Six Sigma certifications.

23. Will the HSPMS be able to “borrow” existing assets (processes, templates, tools, etc.) from other PMO organizations within UTSW? Should we assume that we are providing all of the templates and tools?

There is an IT PMO in at UTSW. They have some transferrable items.

24. How project financials are currently managed within the HSPMS portfolio? Is this an area of focus for this endeavor?

The project plans will often end in identifying resources requests and calculating ROIs. This is important to the team, but the engagement focus should be on developing tools to meet the ROI or end goal.
25. We find that one of the key areas (if not the key area) of providing value in portfolio management lies in enhancing the project selection process. Is the project selection process within scope for this endeavor? If yes, how do new projects get selected at present?

No, senior leadership selects the projects.

26. Has the HSPMS already reviewed specific tools to support project management? If yes, have any conclusions been made regarding which tool is most appropriate?

The office is new and still in the early stages. We are looking to set up processes and best practices.

27. Please confirm that the UTSW Project Management team handles projects in the 60 ambulatory clinics only. Who performs project management for other UTSW projects?

Yes, the focus is the 60 clinics.

28. What metrics do you expect to monitor for patient experience?

Each project has designated metrics. This will be reviewed in detail once a consultant is selected.

29. What metrics do you expect to monitor for margins?

Each project has designated metrics. This will be reviewed in detail once a consultant is selected.

30. As per our understanding from the RFP, the PMO team is already been formed at UTSW. Personnel suggestion, hiring & recruitment activities are outside the scope of this RFP. Please confirm if our understanding is correct.

Yes

31. "Cost and timeline needs to be a included as a part of this assessment" - Please let us know if you are referring to vendor assessment of current PMO status and cost, timeline to improve the PMO's ability to handle projects efficiently at UTSW ambulatory clinics. If not, please clarify.

Yes
32. What type of documentation this engagement is expected to deliver, other than the project management assessment, project management processes and templates?

The focus is on the tools and coordination of projects and project planning. This would include aiding in the work break down, reviewing the execution plan for issues, detail, completeness, and ensuring the communication tools, timelines, and metrics are part of the plan.

33. Please list the type of operations in scope for this RFP.

All ambulatory clinical operations will be covered by the PM office.

34. Please explain what “configuration and practices” are expected to be assessed in the context of this RFP.

The focus is on the tools and coordination of projects and project planning. This would include aiding in the work break down, reviewing the execution plan for issues, detail, completeness, and ensuring the communication tools, timelines, and metrics are part of the plan.

35. How varied are your current project initiatives i.e. are they skewed towards Strategic OR Operational OR a healthy mix of both?

Both

36. How do you currently ensure that your project initiatives align with the organizational vision and mission? Are there any tools / methodologies followed to rationalize and monitor these initiatives?

Yes, they align with the mission and vision b/c they are set by senior leadership with the big picture in mind. The office is new and still in the early stages. We are looking to set up processes and best practices.

37. How are you tracking project activities currently? Are there any metrics/dashboards in use to monitor the visibility across various initiatives?

The office is new and still in the early stages. We are looking to set up processes and best practices. We have initial dashboards.

38. What are the various standards currently followed with respect to conceptualizing and executing Projects at UTSW?

The office is new and still in the early stages. We are looking to set up processes and best practices.
39. Please elaborate on the nature of the projects managed. Are these primarily business projects or Information Technology projects?

Each has an IT component; however, the projects are operational in nature.

40. What is the size and structure of the current Health System project management team?

There are currently 9 people in the PM office. They are dedicated to project management. An org structure will be provided to the awarded party.

41. Do project managers have line reporting into the project management team and How many projects are managed by the team in a typical year?

The office is new and still in the early stages. We are looking to set up processes and best practices. The office is less than a year old. Yes, the PM have line reporting.

42. What is the average size of projects as measured by project hours or budget?

Over 1 year and often over $1M.

43. Our understanding is that the scope is restricted to only Project Management and PMO structure, processes, templates and tools. Process improvement in the ambulatory clinics will be addressed by separate projects that will be managed by the PMO, and are outside the scope of this RFP. Please confirm

The focus is on the tools and coordination of projects and project planning. This would include aiding in the work break down, reviewing the execution plan for issues, detail, completeness, and ensuring the communication tools, timelines, and metrics are part of the plan.

44. Is there a methodology in use that covers processes for risks, assumptions, issues, decisions and questions?

The office is new and still in the early stages. We are looking to set up processes and best practices.

45. Is the PM team expected to be responsible for the financials (planning or monitoring of actuals) for this set of projects?

Yes

46. Does UTSW see a need for project scheduling function that works with the PMs?

The focus is on the tools and coordination of projects and project planning.
47. What technologies, if any, are standards for project management and documentation within UTSW?

The office is new and still in the early stages. We are looking to set up processes and best practices.

48. What locations will the team need to visit and/or work from?

All locations will be at UTSW’s main campus off Harry Hines in Dallas. Most meetings will be in an office setting.

49. Is there an expectation that the assessment team will be responsible for on-going status reporting and meeting facilitation for UTSW projects?

The project managers at UTSW will be responsible for status reporting and meeting facilitation for UTSW projects. The consultants will be responsible for status reports and meeting facilitation during the engagement.

50. What is/are the delivery model(s) used in the IT projects (waterfall / agile)? If multiple models are used what is the breakdown of that work (i.e. 70%/30%)?

The office is new and still in the early stages. We are looking to set up processes and best practices.

51. Will this PM team expect to do Vendor management activities such as Contract Management?

Yes, along with the Contracts and Materials Management departments at UTSW.

52. Are there any activities that UTSW is willing to offshoring out of the possible PM activities?

This is about working in a clinic setting implementing new processes. There is a lot of in clinic work for the PMs.

53. Can certain % of vendor team work from an offsite or offshore location during this assessment?

Potentially, but we prefer vendors onsite.

54. What is the anticipated budget or budget range for this RFP?

Pending the skill set of the proposed team.
55. What is the anticipated duration of the project?

The timeline of the engagement TBD.

56. What is the current structure and work to do date of the project management team?

An org chart will be provided to the selected consultant. The office is new and still in the early stages. We are looking to set up processes and best practices.

57. Should responses only focus on improving the project management structure so that the project management team can then run projects focused on streamlining, standardizing, and improving communications with stakeholders OR are you seeking responses that also help the project management teams carry out their work in these areas (i.e. do you need help improving patient experience, quality, and margin?)

Focus on improving the project management structure so that the project management team can then run projects. This includes ensuring the charters and project plans are well thought out and at the necessary level of detail.

58. Is there a possibility that other UT facilities may entertain our advisory services?

There are likely other RFPs posted on the website.

59. Does this in fact only pertain to a project management structure for the ~60 ambulatory clinics indicated in this section?

Yes

60. Is it safe to assume that any interviews necessary to understand and develop a project management structure can be conducted at one location instead of visiting several clinics? In other words, is there clear understanding of project management requirements at a central location?

All locations will be at UTSW’s main campus off Harry Hines in Dallas. Most meetings will be in an office setting.