

Client Engagement Summary

AltaMed Health Services

Founded in 1969, AltaMed is one of the largest independent non-profit Federally Qualified Community Health Centers in the U.S. delivering more than 930,000 annual patient visits through its 43 sites in Los Angeles and Orange Counties. With annual revenues that exceed \$200 million AltaMed consistently receives the highest ratings from the Joint Commission. AltaMed is an important part of the national network of 7,000 FQHC clinics nationwide that provide health care services to more than 18 million patients each year.

Enterprise Project Management Office –

Operating since its inception without a formal project management office (PMO), AltaMed's initiatives tended to take longer than expected, consume more staff time away from people's "real jobs", and not achieve the expected outcomes, in the rare case that any were defined at the onset.

Recognizing these issues and seeking to resolve them, AltaMed's Vice President of Enterprise Services engaged Sabot to provide assistance in defining, organizing, and implementing the organization's first Enterprise Project Management Office (EPMO). Sabot's Project Management Professional (PMP) and Six Sigma certified Senior Consultant worked closely with the AltaMed business unit leadership teams to understand their requirements and expectations of the EPMO. Sabot also conducted PMO education and marketing to foster an understanding and appreciation of the value that an effective EPMO brings. The initial set of projects selected as prototypes for the EPMO were business-focused initiatives, which required developing customized project management (PM) templates. The PM templates at this early stage of PMO development focus on streamlining the detailed documentation required to summarize, authorize, and kick-off each initiative, in a way that facilitates the documentation being completed and owned by the business sponsors.

In conjunction with providing guidance and direction to the business sponsors and their initiatives, Sabot worked with the EPMO sponsors and management to define the vision and strategy for the EPMO organization, as well as, the on-going financial operating model. The resulting EPMO structure yielded three service offerings ranging from full-time PM (aka "EPMO Managed") to part-time PM coaching (aka "EPMO Coordination") to self-directed PM role with prescribed reporting requirements (aka "EPMO Advisory"). Each level of EPMO services was "financed" based upon a defined business value assessment articulating the cost and benefits that each project would be expected to deliver including the costs related to the EPMO and their level of services provided. This approach ensured that the business would use the EPMO to deliver measurable results, as well as, achieved a consistent process and method for defining and measuring projects at AltaMed.

Sabot's methodology incorporates implementing and exercising the new and improved processes as a critical means of knowledge transfer. In AltaMed's case Sabot provided Project Management support and subject matter expertise for several initiatives where we coached and mentored the organization through their new EPMO processes in context of actual business and technology projects:

- Clinic Facilities Master Project Schedule Templates – for the Clinic Operations group, Sabot created project schedules in MS Project to be used as the standard template for new clinics, acquisitions, and relocations.
- Contact Center Requirements and Procurement – Sabot worked with the project sponsor (Clinic Operations) to elicit and document the requirements for AltaMed's unified contact center encompassing clinic operations (i.e., appointment scheduling, appointment reminders, nurse advice, etc.), marketing (i.e., campaigns, interface to MS Dynamics Customer Relationship Management), patient financial services (i.e., billing), medical management (e.g., case management), and provider relations (e.g., provider information). Sabot assisted in the development of the request for proposal and provided subject matter expertise and project management throughout the procurement process

to select a hosted contact center provider. Sabot is currently providing project management for the implementation of the hosted contact center solution.

- Seniors and Persons with Disabilities (SPD) – In accordance with the 1115 Waiver that mandated the enrollment into managed care for fee-for-service (FFS) Medi-Cal SPD's, Sabot provided project management services to ensure that this critical population was transitioned into managed care. Sabot developed and maintained a detailed project schedule encompassing every AltaMed business unit.
- Workforce Upgrade – Sabot provided project management for both phases of the Workforce Upgrade initiative. Phase 1 focused on implementing an automated assessment tool of core skills (e.g., reading, English grammar, math, computer proficiency) required for every new hire. The assessment tool was integrated into the web-based application process and posted the results into AltaMed's applicant tracking system. Phase 2 is currently underway and entails defining a skills assessment template to enable front office supervisors and clinic administrators to assess front office staff's capabilities in required skills as defined by new job descriptions.

Following Sabot's engagements and leadership by doing, mentoring, and coaching, AltaMed has a functioning EPMO with a number of dedicated project managers trained in formal project management, leveraging the Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK). In addition, the AltaMed business units now appreciate the value of involving the EPMO as demonstrated by their asking for and paying for, through internal cost allocation, project management resources routinely. As AltaMed grows and evolves, the organization's initiatives will be managed and tracked professionally enabling a higher degree of success and better information reporting for executive decision-making.