

Improving the Process

Lessons Learned from an Inaugural HIMSS State Advocacy Day

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KEYWORDS

Advocacy, state healthcare policy, Project Management Book of Knowledge.

ABSTRACT

On May 12, 2008, the Delaware Valley and Western Pennsylvania HIMSS Chapters sponsored the inaugural Pennsylvania HIMSS Healthcare Information Technology Awareness Day, one of the first of its kind for HIMSS and hosted strictly by volunteers. This article will detail not only the many lessons learned but also the application of the principles of project management, according to the Project Management Institute (PMI). This article describes how the people, the processes and the planning of the two chapters were instrumental in hosting this successful event. We will carefully detail our experiences based on PMI's project planning lifecycle methodology of initiation, planning, executing, monitoring and controlling, and closing.

According to the Project Management Institute's Project Management Book of Knowledge (PMBOK), a project is defined as a "temporary endeavor undertaken to create a unique product, service, or result."¹ Recognizing the value of project management, HIMSS volunteers from across Pennsylvania combined efforts to subscribe to those very principles of initiating, planning, executing, controlling and monitoring, and closing a project. Objectives for the event included:

- Educating Western Pennsylvania and Delaware Valley HIMSS chapter members and event co-sponsors on national and state-level HIT efforts and their status; federal and state-level legislation regarding healthcare and IT; and methods on how best to advocate to the legislature for better healthcare through support of broader HIT adoption;
- Increasing awareness of the benefits of HIT among state legislators and their staff through the introduction of timely, targeted and comprehensive information presented by prominent members of the Pennsylvania HIT community; and
- Establishing HIMSS Pennsylvania chapters and co-sponsors as valuable resources in the development of state healthcare policy.

This event provided an unprecedented opportunity to bring together the Pennsylvania HIT community to speak with one voice, demonstrate expert knowledge of the value of HIT, and how that expertise helps legislators understand its value. It also provided an opportunity to identify and introduce constituent HIT experts to their legislators, establishing these experts as a resource in the creation of healthcare and healthcare IT public policy.

INITIATION

As defined by PMBOK, the first of five Project Management Process Groups is the Initiating Process Group. These processes help define and authorize the project.² Each are defined below:

Role of the planning committee and work groups. To accomplish such an initiative, leaders from the Delaware Valley and Western Pennsylvania HIMSS Chapters formed the PA Advocacy Day Planning Committee under the direction of co-chairs Mark Stevens and Charlene Underwood, MBA, FHIMSS. Work groups were formed to address policy initiatives, communications, facilities and legislative outreach. The purpose of the Policy Initiatives Work Group, chaired by Mr. Stevens and Ms. Underwood was to accomplish policy alignment and garner support for the event by identifying, attracting and retaining the event's sponsors and co-sponsors. Chaired by Nancy Bucceri, CPHIMS, the Communications Work Group developed a communications plan that resulted in consistent messaging for all aspects of the project including member communications, media relations, sponsorship recruitment and legislative communications. The Facilities Work Group, chaired by Tim Schoener, CPHIMS, FHIMSS, and Jennifer Pojedinec, assumed responsibility for all logistical aspects of the event, including venue, banquet and reception activities. Chaired by JoAnn W. Klinedinst, CPHIMS, PMP, FHIMSS, the Legislative Outreach Work Group managed the registration process and scheduled appointments for attendees working closely to ensure that constituents met with their legislators.

Role of HIMSS State Government Relations. Pivotal to the efforts of the Planning Committee was support received from Tom Keefe, Senior Director, HIMSS State Government Relations, and his staff. Based on the HIMSS Government Relations Manual, a resource for those wanting to host a state advocacy day, many valuable tips and techniques were shared that helped organizers plan the Pennsylvania event. Further, Mr. Keefe and HIMSS National staff members Blair Hedgepeth, and K. Meredith Taylor provided valuable insights into previous state advocacy days. Ms. Taylor also joined the Planning Committee to provide continuity between the state and national HIMSS.

Role of the HIMSS State Boards of Directors. The support of the Western Pennsylvania and Delaware Valley HIMSS Board of Directors was critical to the success of the event. Both chapter Presidents, Barry Ross, LHIMSS, FHIMSS, DSHS, of Western PA, and Bruce Marcolongo of Delaware Valley, served on the Planning Committee and offered guidance and leadership throughout the entire process. Further, the Planning Committee received support from Jay Srini, a member of the HIMSS National Board of Directors, and a member of the Western Pennsylvania HIMSS board, where she served as Advocacy chair.

Role of the event sponsors. Involvement by event sponsors was critical to the success of the Advocacy Day because we were able to bring together a unified voice on the value of HIT across a broad constituency. Facilitating the adoption of healthcare information technology is a partnership among many. Pivotal to that

relationship are the organizations that advocate for adoption and the vendors who supply the solutions needed to affect change. Both profit-centered companies and non-profit organizations sponsored the event. While sponsors were expected to provide financial support to the event, non-profits were given the opportunity to contribute according to ability. The participation of non-profit associations with large memberships, such as AHIMA, ACHE and the Pennsylvania eHealth Initiative, also helped significantly drive event attendance. In the end, 35 sponsors participated.

PLANNING

The Planning Process Group of the PMBOK ensures that objectives are defined and refined while planning the course of action required to attain the objectives and scope of the project.³ Refining objectives proved critical to later project management as it set the framework for making agenda tradeoff necessitated by the complicated event logistics and for setting the message content. Once the Planning Committee seated its members, work group chairs and participants, the work of identifying the many details of the

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day's events began. The Planning Committee met on a weekly basis to review progress; many work groups met bi-weekly.

One of the most challenging tasks for the Planning Committee was to select the day for the event. The capital of Pennsylvania is Harrisburg, which is centrally located in the state. After long deliberations and weighing of opinions by various legislative staff, the Planning Committee settled on May 12, 2008, as the day of the event. Critical to the success of the event, several legislative staff were recruited to provide guidance on event planning: from venue selection to message content and leave-behinds. This on-going direction provided by senior members of legislative staff proved invaluable.

Obtaining board approval. Another critical task was to obtain approval from both boards for hosting the event. To do so, presentations were prepared that included the concept of the program, the initial budget, the launch package, and the final budget. Planning Committee co-chairs Mr. Stevens and Ms. Underwood presented details of the plan to each board for approval, which was received. Both updated the boards at regular intervals to keep members apprised of project progress. This process served to checkpoint the project, too, making sure that timelines were met and decisions were made.

Venue challenges. Due to the physical design of the Capitol Complex, banquet facilities were located in nearby hotel venues within walking distance. Although not typically a problem, the weather on May 12 resulted in torrential downpours that made traveling to and during the event difficult. In spite of these challenges, more than 80

attendees were welcomed and participated in the day's events by visiting 110 members of the Pennsylvania legislature.

Event theme. The theme of the event was "Better Care Through Information Technology." Our mission was to provide the members of the Pennsylvania General Assembly with the knowledge and information that demonstrates how the widespread use of IT will save lives, prevent medical errors and lower costs. The tactics identified to achieve the goals of the Planning Committee were to:

1. Educate members by highlighting national HIT initiatives, state HIT initiatives and the legislative advocacy process;
2. Educate and build awareness among state legislators by calling for state-level leadership in advancing healthcare reform through broader HIT adoption; providing information regarding on-going successful efforts in others states which have successfully leveraged HIT; improving healthcare quality and lowering costs, providing information regarding HIT success stories in Pennsylvania; and demonstrating the need to build upon these efforts;
3. Develop statewide HIT leadership by providing an unprecedented opportunity to bring together the Pennsylvania HIT community to speak with one voice, demonstrate knowledge of the value of HIT and how that expertise will support the legislators in understanding its value and creating policy to advance HIT adoption, identify and introduce constituent HIT experts to their legislators, and establish these experts as resources in the creation of public policy effecting healthcare and HIT.

Event format. The Planning Committee followed recommendations of other State Advocacy Days and HIMSS National events in terms of event formatting. As a result, the Planning Committee recommended a one-day format, with breakfast followed by introductions and a morning keynote speaker. Following a break, a legislative panel comprised of executive, legislative and committee staff convened and discussed current HIT issues, being sure to address questions of the attendees. A representative from a legislative consulting firm provided an "Advocacy Day 101" session, which included a review of goals, objectives, materials and schedules. After arrival at the Capitol Complex, HIMSS members were scheduled for two hours of meetings, which were followed by a nearby reception. Based on travel considerations and feedback from other chapters, we set the program to accommodate morning arrivals.

Obtaining Proclamation Day status. With the Planning Committee seated, both boards approving the event, and the event theme created, the next step in the process was to obtain Proclamation Day status by both the House and Senate Chambers. This step proved to be critical to our success of gaining buy-in from the legislative staff when scheduling appointments. When making legislative appointments, the staff really did not know who HIMSS was, but by mentioning the resolutions passed in either the House or the Senate, legislative aids were immediately receptive. (See sidebar, this page)

Web site communications. Getting the message out to the more than 1,000 Pennsylvania HIMSS members was paramount in attracting attendees. Webmasters from both chapters were very helpful in posting event updates. Registration was handled

Technology and Healthcare: A Good Fit

HARRISBURG, APRIL 1—State Sen. Connie Williams today introduced a Senate resolution declaring May 12, 2008 as Pennsylvania Health Care Information Technology Awareness Day in Pennsylvania.

"Why should people care about how technology is impacting health-care delivery in Pennsylvania," Williams asked. "They should care, because technology has the potential to reduce medical errors, prevent adverse drug events, ensure quicker diagnosis through less invasive tests and create a medical record system that ensures your medical records are up-to-date and accessible by the health care professionals that you see on a regular basis, as well as in times of emergency. In short, technology has the potential to save lives and to reduce health-care costs in a very real way."

Williams, who is Democratic Chair of the Senate Communications and Technology Committee, has spent the last several years traveling across Pennsylvania to see technology in use. She has witnessed the use of computer technology to link rural and urban hospitals, providing people in rural communities with specialists, who can read their scans and communicate with the patient in real time, as well as being shown e-prescribing programs that reduce human error and immediately show any potential negative interactions a patient may have with other drugs, and has visited smart houses equipped with technology that allow people to remain independent much longer.

through a survey tool since integration was not available between the two Web sites (one was HIMSS-sponsored and one was independent of HIMSS).

Technology. Because the members of the Planning Committee were dispersed across the state, collaboration tools such as telephone conference lines, WebEx, SharePoint, and email were used extensively to conduct the work. A detailed project plan using Microsoft Project® was used to track tasks and was updated on a regular basis.

EXECUTION

The execution phase occurs on the day of the event and coincides with the Monitoring and Controlling Process Group. According to the PMBOK, the Execution Process Group task "integrates people and other resources to carry out the project management plan for the project."⁴

The events of the day proved to be exciting! All the Planning Committee's hard work resulted in engaged attendees that truly were interested in advocacy on behalf of healthcare information technology.

CLOSING

With any critical project, the closing phase is incredibly impor-

Table1: PA HIMSS HIT Advocacy Day SWOT Analysis.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Market value of House and Senate resolutions • Clear, concise and consistent message • Commitment and follow-through of work group chairs and members • Strong advisory support from key legislators • Strong collaborative relationship between 2 geographically dispersed chapters • Strong support from HIMSS National • Good media response to pre- and post-event public relations • Well organized registration and check-in process • Pre-scheduled legislator meetings with constituents • Effective advocacy training for participants • Well organized information packets • Quality of venue and event services 	<ul style="list-style-type: none"> • Lack of time between legislator appointments • Lack of time for participants to absorb education and legislator appointments prior to first appointment • Unanticipated logistics in dealing with travel time between buildings, security and other constituency groups visiting the Capitol • Lack of signage at the hotel and in the Capitol to help direct participants to the event and legislators to the reception • Logistical issues with late registrations and no-shows, causing missed appointments • Labor-intensity of scheduling legislator meetings • Coordination of drop-off materials to legislators not scheduled for meetings
Opportunities	Threats
<ul style="list-style-type: none"> • Continuity with legislators by establishing the same day for the annual event • Higher impact with legislators by collaborating or coordinating with similar groups holding similarly focused advocacy events • Use of information technology such as WebEx to provide pre-event orientation and education to participants • Use of information technology such as SharePoint, WebEx, etc., to increase productivity of work groups 	<ul style="list-style-type: none"> • Impact of inclement weather on turn-out and pre-scheduled legislator meetings • Impact of legislative session schedule changes on ability to meet with legislators • Impact of imbalance between the constituents and legislators, making it difficult to reach all legislators • Impact of last minute facility changes by the Capitol, such as reception location

tant. The PMBOK describes the process of this group as that which “formalizes acceptance of the product, service, or result and brings the project (or a project phase) to an orderly end.”⁵ Because this event was designated as “inaugural,” the Planning Committee was careful to capture an analysis and lessons learned of the day’s events. To do so, the SWOT (strengths, analyses, opportunities, and threats) Analysis tool was used. This proved to be insightful and will be used as a basis for the next advocacy day. The following exhibit summarizes the SWOT analysis that was conducted after the event, identifying the strengths, weaknesses, opportunities and threats that the PA HIMSS chapters will factor into its future advocacy day plans. (See Table 1, pg. 46)

In addition to the SWOT analysis, we were careful to ensure that thank-you notes and follow-up communications with legislators and their staff occurred closely following the conclusion of the event, including an invitation to a complementary HIMSS membership. The Planning Committee also had several articles printed in HIMSS publications, *ADVANCE for Healthcare IT Executives* and *Western Pennsylvania Hospital News* prior to and following the event. An op-ed piece by two senators and influenced by our message also ran the day of the event in the Philadelphia and Harrisburg media markets calling for broader adoption of HIT. This earned media helped drive attendance and promote the program and its sponsors.

In addition to the House and Senate resolutions, HIMSS was formally recognized on the floor of the Senate on the day of the event. Further, the Planning Committee presented an excellence award to event keynote speaker, Sen. Rob Wonderling, for his long-standing support of HIT. Organizations like AHIMA, ACHE and PAeHI helped publicize the event among their members (a significant number) and healthcare IT gained a higher profile among the General Assembly, indirectly helping to secure \$4.4 million from the legislature to support the Governor’s new statewide health information exchange program, PHIX, as well as operational support for the Pennsylvania eHealth Initiative.

CONCLUSION

The success of the inaugural Pennsylvania HIMSS Healthcare Information Technology Awareness Day demonstrates the value of using principles of project management. Using these techniques enabled the effective management and execution of a large, complicated, grass roots project, fully staffed by volunteers. The

techniques allowed for the bounding of project scope so that project objectives were achieved or exceeded.

And while the project management techniques were critical to project success, the more important point is that they allowed for highly committed volunteers to come together effectively to execute a large and logistically complex event. While the planning was well done, it took the energy and focus of work group chairs and team members to actually step up on the day of the event and bring it to life. So much so, the Planning Team received the June 2008 “Spirit of HIMSS” award, acknowledging its remarkable contribution and volunteer effort that greatly increased HIMSS awareness among legislators. Good project management will help people doing the work truly make a difference.

Note: The recipients of the June 2008 award are Nancy Bucceri, Sharon Dorogy, JoAnn Klinedinst, Gail Malcolm, Bruce Marcolongo, Michele McGlynn, Peg Meadow, Jennifer Pojedinec Kim Slocum, Sean O’Rourke, Barry Ross, Tim Schoener, Jay Srinii, Mark Stevens and Charlene Underwood. **JHIM**

Nancy Bucceri, CPHIMS, is the Managing Partner of Chaddsford Planning Associates, LLC, a certified woman-owned business enterprise providing integrated marketing communications and business development services to financial services providers, information technology companies, health-care providers, consulting firms, trade associations, manufacturers and government agencies.

JoAnn W. Klinedinst, CPHIMS, PMP, FHIMSS, is Senior Director of Healthcare Information Systems for HIMSS. As the HIMSS Staff Liaison to the Enterprise Information Systems Steering Committee and the Management Engineering-Process Improvement Committee, she works with volunteers to facilitate the delivery of tools and resources for HIMSS members.

Mark Stevens is Executive Director of the Pennsylvania eHealth Initiative, a statewide not-for-profit organization founded in 2005 by Pennsylvania’s leading healthcare stakeholders to promote the broader adoption of electronic medical records and the establishment of health information exchanges throughout the Commonwealth.

Charlene Underwood, MBA, FHIMSS, is Director of Government and Industry Affairs for Siemens Medical Solutions. A nationally recognized expert in the field of healthcare informatics, Ms. Underwood directs Siemens outreach and advocacy activities in emerging market initiatives, specifically those related to government activities in healthcare information technology, including the United States.

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