



Complex initiatives made simple.

## The Product

Information technology planning has become a critical management competency for health care organizations. Fulcrum Methods **Long Range Planning** method provides a structured approach to focus an organization on the potential of information technology to support and enable business, medical service and community health goals. **LRP** is a powerful tool for:

- Development of an initial information technology plan coordinated with an organization's overall strategic mission and vision
- Updating an existing plan
- Aligning information technology capabilities with an organization's detailed market share, medical service, operational excellence, performance, and financial objectives
- Assessing current state capabilities with a desired future state
- Determining the expandability or expendability of in-place technology
- Reviewing alternate, realistic approaches to achieve the future state vision
- Selecting the best fit alternative in the context of the organization
- Defining initiatives to execute the information technology plan, including criteria for success and benefit expectations
- Establishing the pathway to success in terms of multi-year capital and operating budgets, implementation schedules, information technology staffing and resource plans as well as ongoing governance structures to oversee the plan's execution

## The People

"John Muir Health is a very dynamic organization in a challenging market. We needed a flexible, yet proven, planning methodology. Fulcrum has provided us with that tool, and we have used it as our information technology planning resource consistently over the last decade."

**Eric Saff, CIO**  
**John Muir Health**

## The Power

- Flexibility to initiate first- time plan, renew existing plan or complete annual updates
- Establishes multi-year vision with actionable pathway to achieve success
- Assists senior management in articulating vision and strategic objectives
- Institutes philosophy and approach to investment decisions
- Evaluates technology and vendor alternatives to achieve the planned goals
- Integrates information technology planning into strategic planning
- Identifies technology trends and enables potential new business, new services, and operational improvements in today's market
- Enables realistic and objective priority setting, budgeting and resource decisions

## The Value

- Long-term information technology plan that commands organization-wide support
- Alignment of business, medical service and information technology needs
- System lifecycle and governance practice established
- Goals with specific success criteria, accountabilities and timeframes
- Informed management team regarding technology issues
- Continuing education with Fulcrum Methods Certification Program
- Flexible licensing structure scalable to your requirements

### Learn More:

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## The Solution: LRP

### Work Plan

- Establish project structure and quality control plan
- Establish project governance
- Conduct education & exploration sessions
- Gather baseline technology/business plan information
- Review business/technology context
- Identify potential new IT-enabled business and service markets
- Identify IT driven potential operational improvements to core business applications
- Create future state vision
- Develop IT alternatives; select best fit
- Develop information technology plan and implementation path

### Guidebook Overview

- Project Planning
- "Framework for Success"
- Analyze Business, Service, System and Technology
- Develop Information Technology Alternatives
- Document Information Technology Plan
- Project Administration and Closure

### Standard Deliverables

- Project Charter
- IT Governance Approach and Charters
- Interview (Executive, Management, Physician, Clinician, User, Consumer) Templates
- Current State Assessment Templates
  - ✓ Technology, Business Objectives, Staffing, Performance, Satisfaction
  - ✓ Comparison of current IT costs and capabilities against national benchmarks
- Future State Vision Template
  - ✓ Requirements, Capabilities, Technology
  - ✓ Business Objectives and Systems Implications Matrix
- Alternatives Identification and Analysis Template
  - ✓ Status Quo vs. Alternative Investment Analysis
  - ✓ Selection of Best Fit Alternative
- IT Management Plan Template
- Status Report Template





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## John Muir Health

John Muir Health (JMH), serving Contra Costa and Solano counties in California, is one of the region's premier health care providers. JMH consists of two major medical centers, a psychiatric hospital and the John Muir Physician Network, a not-for-profit medical foundation. Additionally Muir Lab is one of the largest hospital outreach laboratories in the nation.

JMH is a nationally recognized provider of care in many disciplines, including: cardiovascular, medicine, orthopedics, cancer, neurosciences, obstetrics, digestive disorders and emergency medicine, as well as a participant in leading-edge medical research and clinical studies. John Muir Health has been recognized as: a Top Hospital by US News and World Report, a Top 5 Trauma Center by the SMARTT report and a Top 10 hospital outreach laboratory.

## Challenge

John Muir Health was looking to further develop information management principals and capabilities throughout the organization, including:

- Maximizing existing IT investments and vendor relationships
- Establishing a robust information exchange into and across John Muir Health and other community-wide entities and constituencies
- Using a value-based cost-benefit model for approving or rejecting specific IT initiatives
- Creating uniform and equal access to clinical and financial information
- Transforming data into information by supporting end user decision support and knowledge sharing tools
- Upholding a secure environment for communication and data access
- Sustaining regulatory compliance

## Solution

- Use Fulcrum Methods **Long Range Planning** to create an initial IT Long Range Plan to ensure IT investments:
  - Are fully aligned with the organization's business and strategic goals
  - Decrease costs across the organization
  - Achieve operational efficiency
  - Maintain or improve quality of care
  - Increase market share
  - Improve market image
- Use Fulcrum Methods **Long Range Planning** to regularly refresh the IT Long Range Plan to keep current with technical, operational, strategic, regulatory, functional and budgetary changes

## Results

- JMH created a roadmap for technology deployment and process redesign for the short and long-term
- JMH initiated a process to revisit, validate and refresh the plan on an annual basis
- Constructed a future-state vision for JMH information technology capabilities
- Developed a cost-benefit ROI model for assessment of proposed JMH IT initiatives
- Prioritized information technology initiatives to position JMH in line with local competition
- Engaged executive management to educate them about industry trends and best practices



### At a Glance

- 650 bed integrated healthcare delivery system
- Top 5 Trauma Center nationwide
- Not-for Profit Medical Foundation
- Wide array of inpatient and outpatient facilities and services
- Top 10 hospital outreach laboratory nationwide
- Long Range Planning Methodology used to create and regularly update IT Long Range Plan to remain in step with the organization's overall strategic mission and vision
- Over 100 licensed Fulcrum Methods users

### Additional licensed Fulcrum Methods:

- Program Management Office (PMO)
- Systems Implementation
- Vendor Selection
- Cost Benefit Analysis
- Contract Guidelines