

## Activation and Operational Planning: Ensuring a Successful Transition

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**T**his article addresses the management challenges inherent in bringing a replacement hospital facility online through a process that maintains the continuity of the organization's business while maximizing the benefits of the new facility. Planning for the activation of a new facility incorporates the processes of identifying, defining, organizing, and facilitating all of the tasks that are required for the occupation of the new facility in a logical, timely, safe, and cost-effective manner. Successful project occupancies do not just happen; rather, they are the result of focused and systematic planning and implementation.

Early attempts at new-facility activation focused on the logistics of installing new equipment and furniture, scheduling the building turnover sequence with the contractor, and ensuring that the patient move went well. In today's competitive healthcare market, that limited focus is no longer adequate. To gain competitive advantage and fully realize the benefits of a new facility, its design for the future operating model (work and patient flows, use of technology, deployment of human resources, management practices, and performance targets) must be an integral focus of the activation planning process.

### **OBJECTIVES OF AN ACTIVATION PLAN**

Past research demonstrates the potential financial benefits of replacing outdated healthcare facilities (Hosking and Jarvis 2003). Other benefits accruing to organizations that successfully implement a replacement facility strategy include the public's perception of market leadership and an improved customer service environment. Additionally, in many replacement projects the leadership expects that the new facility will not simply resolve long-standing service delivery issues but will also enable the institution to move toward a best-in-class operational model characterized by upper-quartile operating performance. Toward these ends, the dynamics of a hospital's planned operational processes, organizational culture, and ability to execute complex performance improvement strategies must be addressed within the context of activation planning to minimize risk and ensure a smooth facility transition.

Our experience in completing more than 30 healthcare activation projects suggests that a clear vision for the future facility, well-articulated guiding principles for

planning, and specific performance objectives are strong determinants of success. In this context, the specific objectives of a structured operations and activation planning process are as follows:

- Ensure that plans for the operation are developed in accordance with the vision and operating priorities.
- Effectively manage the risks (economic and other) associated with the activation.
- Minimize the time from construction completion to start-up of operations.
- Ensure that regulatory and compliance requirements are met.
- Manage the impact that activation will have on existing operations.
- Ensure that patient care delivery and other service delivery processes are effectively planned and coordinated.
- Achieve service levels that meet or exceed the expectations of medical staff, the public, and other constituencies.
- Facilitate accurate budgeting for start-up activities and ongoing operations.
- Leverage the facility activation to promote the new facility in the marketplace.

To effectively manage these objectives, leaders should specifically address and integrate them within the overall activation plan and (to the extent possible) create metric measures of performance for each.

## **KEY DIMENSIONS OF ACTIVATION AND OPERATIONAL PLANNING**

Activation planning involves anticipation of and control over two types of issues: logistical and operational. In our view, both must be addressed if the overall plan is to be successful.

*Logistical issues* include planning and implementation of the facility-related aspects of the project. Such items include planning for building turnover and readiness for occupancy; installing new equipment, furniture, telecommunications, and signage; hiring a moving contractor; and developing a departmental move-in sequence. The outcome of successful logistical planning will be a series of action schedules that describe tasks to be accomplished along with task dependencies, budget allocations, and personnel assignments.

*Operational issues* include planning for new processes and practices that define the way that the organization will conduct business. The primary emphasis in this area of planning is the review and design of clinical and business operations in anticipation of the new physical environment. Additionally, process design will drive an education, training, and orientation work effort that must be effectively coordinated. To the extent that future operations have been well defined and articulated as part of the functional space planning process, operational planning efforts will

take the form of detailed implementation planning (e.g., the establishment of new front-end patient processes to support an integrated outpatient diagnostic center).

To effectively integrate the multifaceted planning process required to prepare a comprehensive activation and implementation plan, hospitals should consider the establishment of a multidisciplinary task force structure, as described in Table 1.

An important assignment for each task force is to create an integrated plan that defines major tasks and implementation activities, time frames for execution, task dependencies, responsibilities, and resource requirements. The real level of integration of these plans will be tested by a steering group and a master Gantt chart depicting the project tasks and a critical path to minimizing implementation timing.

### **CRITICAL FACTORS TO SUCCESS**

Activation planning and implementation may be organized and managed through a variety of approaches that will be shaped by organizational time constraints, resource availability, strategic priorities, and corporate culture. It has been the authors' experience that no two activation plans are exactly alike. However, some common elements have characterized successful activation planning programs, and these can be considered as emerging best practices relative to the activation and operational planning processes. In particular, the following guidelines should be considered as preparations for activation planning are undertaken:

- Use multidisciplinary teams to drive the planning process and ensure that cross-functional processes, as well as enabling elements (e.g., information technology, human resources), are clearly integrated within process and activation plans.
- Equip planning teams with the necessary knowledge and tools to effectively complete their work. This may include training in meeting facilitation as well as specific orientation to project objectives, macroschedules, and guiding principles.
- Provide consistent, real-time communication of project schedules and plans to all relevant constituencies, including planning teams, medical staff, employees, and the community.
- Develop a database of activation issues, questions, and answers that is accessible to interested parties. Many organizations have adopted intranet capabilities to serve this need.
- Assign a project champion to coordinate, facilitate, and drive all aspects of activation planning and implementation, and ensure that this individual has adequate time allocated to fulfill this role.
- Make decisions in a timely manner, and communicate the decisions across the planning organization.
- Do not underestimate the time and dollar investments that activation planning and implementation will require.

**TABLE 1**  
**Multidisciplinary Task Force Structure**

<b>Task Force</b>	<b>Sample Areas of Focus</b>
Building Readiness	<ul style="list-style-type: none"> <li>• Contractor building turnover schedules</li> <li>• Coordination with building-commissioning activities</li> <li>• Building cleaning and security</li> <li>• Inspection and licensure preparedness and schedules</li> <li>• Equipment and furniture installation and acceptance</li> <li>• Preoccupancy stocking of supplies, medications, and linens</li> </ul>
Information Technology (IT) and Telecommunications (telecomm)	<ul style="list-style-type: none"> <li>• Implementing the IT/telecomm program</li> <li>• Ordering and installing IT/telecomm equipment</li> <li>• Validating new phone numbers, new computer addresses</li> <li>• Subnetworking to support departmental operations</li> <li>• Relocating equipment as planned, with minimal operating disruptions</li> </ul>
Patient-Move Planning	<ul style="list-style-type: none"> <li>• Establishing patient-move sequence and routing</li> <li>• Organizing patient-move support equipment and personnel</li> <li>• Maintaining patient safety and dignity during the move</li> <li>• Defining support department responsibilities during the move</li> <li>• Maintaining lines of communication with families and medical staff</li> </ul>
Department-Move Planning	<ul style="list-style-type: none"> <li>• Department operating dependencies and move sequences</li> <li>• Specialty equipment disconnect/reconnect requirements</li> <li>• Moving-contractor support</li> <li>• Interim operating plans and continuity of service</li> </ul>
Marketing and Public Relations	<ul style="list-style-type: none"> <li>• Grand opening activities</li> <li>• Public and specialty tours and events</li> <li>• Public communications, including service-scheduling impact</li> <li>• Facility staff communications and updates</li> <li>• Change of address issues</li> </ul>
Education and Training	<ul style="list-style-type: none"> <li>• Orientation of staff to new facilities, including new operational plans and practices</li> <li>• Staff training on new building systems</li> <li>• Staff training on new equipment, including IT/telecomm systems</li> </ul>
Operations Design and Implementation	<ul style="list-style-type: none"> <li>• New business operational procedures</li> <li>• New clinical and support operational procedures</li> <li>• Training and simulation activities</li> <li>• New policy and procedure documentation</li> </ul>

- Initiate activation planning activities at least one year in advance of the expected facility occupancy date.
- Provide for adequate staff training and orientation time in the new facility.
- Simulate operational procedure changes before introducing them to the public.

## **CONCLUSIONS**

Our experience demonstrates that effective planning for facility activation involves focus and control over the logistics of occupancy, as well as the design of future clinical and business processes, to be established within the new physical environment. In some cases, new operating methods are driven by a change in the physical environment; in other cases, they are driven by a desire for improved performance. In either instance, it is critical to design new operating methods with input from functional stakeholders to ensure consensus and ownership in solutions.

Successful facility activation also depends on close coordination of the logistics of a building start-up. Integration of contractor activities and schedules, the timely installation of new equipment and furniture, and a well-communicated sequence of departmental events via an easily accessible scheduling program are predictors of success. Hospital leaders preparing to undertake facility activation planning are advised to benchmark successful projects to benefit from the significant industry experience in this complex, time-intensive, and high-risk arena.

## **Reference**

Hosking, J., and R. Jarvis. 2003. "Developing a Replacement Facility Strategy: Lessons from the Healthcare Sector." *Journal of Facilities Management* 2 (3): 214–28.

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