

PERFORMANCE WORK STATEMENT (PWS)

**DEPARTMENT OF VETERANS AFFAIRS
VETERANS HEALTH ADMINISTRATION
OFFICE OF QUALITY, SAFETY AND VALUE**

Product Effectiveness Measurement Services (PEMS) Functional Review (PEMS-FR)

Date: November 15, 2016

PEMS-FR PWS Version Number 1.0

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1. GENERAL INFORMATION

The Veterans Health Administration (VHA) established the Product Effectiveness (PE) program office to perform various measurement assessments and analyses on specially selected health care programs, products, and processes to ensure they are effective and/or meet the needs of VHA stakeholders and ultimately provide business value to VHA. PE measurement assessments encompass functional reviews, customer satisfaction, lessons learned, and benefits realization. PE's services focus on the planning, collection of data, analysis and reporting of enterprise and business benefits from significant programs, processes, technology, and medical products to measure their effectiveness and help improve them. The Product Effectiveness Measurement Services (PEMS) Functional Review (PEMS-FR) contract supports the PE FR program.

PE projects support VA stakeholders at the highest executive levels with independent measures of programs and initiatives to understand their effectiveness and identify recommendations for improving performance. PE's findings are intended to be used to validate investment decisions, provide accountability, identify gaps and challenges, and support continuous improvement of VHA mission critical health information and informatics projects. The subject matter of the work described in this PEMS-FR PWS involves measurements, findings, and recommendations related to the highest priority initiatives within the Department of Veterans Affairs. As such, the results of the advisory and assistance produced via this contract (i.e., the contractor's findings and recommendations) shall be developed using a rigorous process to ensure they are suitable to inform decision making by senior program leaders, top-level agency leadership, and members of Congress. These decisions have a direct impact on the success of the mission, and most importantly, on the provision of health care services to Veterans.

This contract supports the administration of PEMS-FR assessment projects, also referred to as engagements when one or more projects are in support of a VHA program office or project, for the VHA Product Effectiveness Program. The following describes the services required to support the goals and objectives of the PE organization.

2. SCOPE:

The focus of the PEMS-FR contract is to understand the impact of product and process enhancements and deployments on existing and/or potential future operations and health care delivery settings from a business value perspective.

PE uses a rigorous process to conduct its assessments to ensure findings are accurate and include credible evidence based information that can be used to inform key decision makers since resulting actions taken often have a direct impact on the success of the mission, and most importantly, on the provision of health care services to Veterans.

PE assessments require the contractor to exercise critical thinking provide comprehensive and detailed problem statements, hypotheses, perform thorough analysis, and articulate the messaging of salient information at an executive level which includes bottom line up front, or key findings, information in plain language from a business value perspective. The contractor shall perform this work in various work settings to include clinical/healthcare delivery, administrative, operational and logistical environments.

It is imperative that PE has the level of expertise needed to fulfill its mission. The Contractor shall provide services to successfully initiate, plan, and execute projects, also referred to as Engagements. Activities to be performed include developing comprehensive measurement plans; reviewing business rules and workflow processes; planning and performing data collection; conducting comprehensive

analysis; identifying impacts, correlations and benefit outcomes being realized; reporting business and enterprise benefits and value of programs, processes, technology, and medical products; and make recommendations on improving their performance. This includes validating investment decisions, providing accountability, and supporting continuous improvement of VHA mission critical health information, informatics, and workforce projects.

Through continual process improvement and coordination with the Office of Information and Technology (OI&T), VHA program offices, and system vendors, PEMS-FR aims to ensure that the functionality requested by customers is successfully implemented into finished IT products and that VHA customers receive products and processes that enhance the Veteran experience.

PEMS-FR specifically supports the following functions:

- Identifies requirements-related issues early in the product development/build and/or procurement phase
- Ensures test plans capture the correct test elements and adopt appropriate measures of effectiveness
- Traces requirements for accuracy and completeness
- Documents existing workflows to identify gaps in functionality that need to be addressed by future state requirements
- Documents post implementation workflows to help determine if the initial gaps in functionality have been addressed
- Documents and assesses foundational and functional benefits before and after a project is implemented through pre and post implementation measurement
 - Pre implementation and post implementation measurement and comparison helps to ensure strategic benefits are realized
- Assesses the operational readiness of a product prior to deployment
- Provides stakeholders with evidence to make go/no-go decisions on program or product delivery
- Performs post-deployment implementation reviews to analyze the success of product implementations and identify and measure anticipated functional benefits

FR INTEGRATION WITH PE MEASUREMENT

FR's analysis and technical review is essential to the overall PE Benefits Measurement analysis to qualitatively measure the effectiveness of a system, process, or solution. FR technical reviews measure the functional benefits and the level to which users realize those benefits. Each system has operational, clinical, safety, time savings, and other benefits that are intended to be provided by the introduction of new tools and processes; however, many of these benefits have technical and functional dependencies. Systems cannot maximize their potential, and users cannot realize the full set of benefits if there are: a) technical issues that restrict the use of the system, and/or b) the system is not developed/designed such that the functionality supports the needs of the end user. PE's measurement plans and the subsequent analysis thus are dependent on FR analysis of systems' functional effectiveness benefits. FR technical reviews are integrated with efforts from the other PE domains to provide a full analysis and assessment

The purpose of the Functional Review P&P is to describe the procedures for administering a Functional Review engagement to perform functionality and product usability risk assessments for VHA Health Information Technology (HIT) products and services. It is a detailed, step by step process by which Functional Review services and associated deliverables shall be completed. This document contains the project phases and deliverables. All contract deliverables include services required to perform the Functional Review task phase as well as document deliverables. These services are described in detail in the P&P and are required to perform the task phases successfully. Some services, such as working sessions and peer assist sessions may be iterative. Please refer to the Functional Review CONOPS and P&P for more detail on these services. Documentation described in the P&P as part of the process which are not specifically called out as Deliverables in this TO are considered required work products supporting the deliverables.

The purpose of the CONOPS is to describe the concept of operations from the point of view of the program for implementing the Functional Review service. The CONOPS serves as a communication tool for the Functional Review program and is provided to the Contractor to assist with understanding the context of the services in relation to the program.

The following table provides alignment of TO phases with the corresponding sections found in the Functional Review P&P, and is necessary to explain the Contractor's role in providing tasks to support the program:

Functional Review Task Phase	Functional Review P&P Section
1. Due Diligence	0.0 Project Initiation
Pre Implementation Assessments	
2. Project Baseline Review	1.0 Planning Phase
3. Baseline Operational Assessment	
4. Requirements Analysis Review	2.0 Design Phase
5. System Test Readiness Review	3.0 Implementation Phase
6. User Acceptance Test Readiness Review	
7. Operational Readiness Review	4.0 Deploy Phase
Post Implementation Assessment	

8. Product Usability Assessment and Post Implementation Review	5.0 Operations and Maintenance Phase
Program Management Activities	
9. Lessons Learned	Not Applicable to P&P, see the Functional Review PEMS-FR PWS Section 5.9
10. Engagement Program Management	Not Applicable to P&P, see Functional Review PEMS-FR PWS Section 5. 10

Table 1.0 Pre and Post Implementation Assessments

2.0 Applicable Documents

See PE Functional Review PEMS-FR PWS Section 2.0 – Applicable Documents.

3.0 SCOPE OF WORK

The FR team provides comprehensive expertise in project assessment and analysis and can provide detailed, independent reviews at key points in the project to surface issues and risks that may impede full adoption or readiness of a program or product. PEMS-FR works closely with the project team to tailor the functional review process and identify those quality gate reviews that will provide the most value and align best with the project, keeping in mind schedule, resource, and other constraints.

This Task Order provides for eight (8) engagements. All of the engagements contain a subset of the task phases that are contained within the full suite of services provided by the Functional Review domain. Engagement 3 is a Functional Review engagement which includes task phases that take place during the implementation and post implementation stages of a project.

Engagement 4 includes Due Diligence, Baseline Operational Assessment, and Product Usability Assessment and Post Implementation review task phases.

Engagements 1, 2 and 5 are Functional Review engagements which cover Due Diligence along with additional task phases that take place later in the project lifecycle.

Engagements 6, 7 and 8 are Functional Review engagements which focus on the Due Diligence, Baseline Operational Assessment and the Product Usability Assessment aspects of a project. As part of the Baseline Operational Assessment it may be required to perform an “impact analysis” that will determine where the functional benefits of implementing a new application or process exist within impacted clinical workflows. Engagements 6 and 8 will also perform a Project Baseline Review which is intended to review project documentation. Engagements 6 and 8 will also focus on the Post Implementation

Review project phase which will assess whether the implemented solution is operating as expected both from a functional and usability perspective.

The deliverables created within a particular task phase will be based on the specific needs of the customer during that phase. For example, during the post implementation review phase of Engagement 3 the customer only needs to have a PIR Gaps and Recommendations assessment performed. Therefore the full suite of deliverables for this Task Phase does not need to be developed. Also, the Customer Brief deliverable will only be produced for a project that requires a formal Functional Review process or when creating a presentation to discuss critical findings with the customer.

Task Phases 9 and 10 will normally be included for each engagement and provide these services for the entire TO. Not all listed deliverables may be purchased for an engagement and phases may be repeated within a single engagement. These Engagement definitions are for the purposes of outlining the planned services; any phase or deliverable may be applied to any of the program's engagements to account for resource needs as the engagements progress.

The level of effort required to support Functional Review's customers will vary based on the scope of the project, project timeline, and the number of task phases and associated deliverables within a particular task as outlined with the Functional Review P&P document that are required to support engagements. A medium Level of Effort (LOE) engagement would typically last four (4) to six (6) months and would require four (4) to five (5) task phases to support engagement milestones. A high LOE engagement will typically take a 20 percent higher level of effort to support compared to a medium LOE engagement, last longer than six (6) months in duration and requires at least five (5) task phases to support engagement milestones. A low LOE engagement will typically take a 20 to 30 percent reduction in the level of effort to support compared to a medium LOE engagement, last less than four (4) months in duration and requires one (1) to two (2) task phases to support either Due Diligence efforts or project engagement milestones. Some of the Functional Review Task Phases listed below may be repeated based on scope of an engagement.

The following table represents the required engagement(s) within this TO:

Engagement	Included Functional Review Task Phases									
	1	2	3	4	5	6	7	8	9	10
Engagement 1 High LOE	X	X	X	X	X			X	X	X
Engagement 2 Medium LOE	X	X	X		X			X		
Engagement 3 Medium LOE				X			X	X		
Engagement 4 Medium LOE	X		X		X			X		
Engagement 5 Low LOE	X		X				X	X		
Engagement 6 High	X		X	X				X		
Engagement 7 Medium	X		X					X		
Engagement 8 Low	X	X	X	X	X					

X = Requested Phase Table 2.0 Notational Illustration of High, Medium and Low PEMS-FR engagements

4.0 PERFORMANCE DETAILS

1.1 PERFORMANCE PERIOD

The period of performance shall be from the date of award for a one (1) twelve (12) month base period-year period, and one (1) consecutive twelve (12) month option year.

1.2 PLACE OF PERFORMANCE

The majority of the tasks under this PEMS-FR PWS shall take place at the Contractor's site; however, some tasks may be performed at various Government facilities. No work at any Government site shall take place on Federal holidays or weekends, unless directed by the Contracting Office.

On occasions, work may be required at the travel locations as indicated in the Travel Section below.

1.3 TRAVEL

The Government anticipates travel under this effort to perform the tasks associated with the effort, as well as to attend program-related meetings or conferences through the period of performance. Include all estimated travel costs in your firm-fixed price line items. These costs will not be directly reimbursed by the Government.

The Government estimates the following travel for the period of performance (PoP):

Estimated Destinations	Approximate Number of trips	Approximate Number of Contractor Personnel required per trip	Approximate Number of days per trip
Portland, OR	9	2	3

All travel shall be in accordance with the Federal Acquisition Regulation (FAR) and Federal Travel Regulations (FTR). Local travel within a 50-mile radius from the Contractor's facility is considered the cost of doing business and will not be reimbursed. This includes travel, subsistence, and associated labor charges for travel time. Travel performed for personal convenience and daily travel to and from work at the Contractor's facility will not be reimbursed. Travel, subsistence, and associated labor charges for travel time for travel beyond a 50-mile radius of the Contractor's facility are authorized for

reimbursement on a case-by-case basis and must be pre-approved by the Contracting Officer's Representative (COR).

Comment [DoVA1]: *Change*

Travel costs will be included in the TO award as a separate, cost-reimbursable, "not to exceed" line item. Travel will be requested, approved and reimbursed in accordance with the TO.

5.0 SPECIFIC TASKS AND DELIVERABLES

The Contractor shall provide deliverables described within this TO, in accordance with the PEMS-FR PWS, P&P, and CONOPS. Deliverables shall be written clear and concise from a business value perspective and need very little, if any changes upon government review. These documents should be written as if they are being presented to the VHA Under Secretary for Health.

The Contractor shall upload all deliverables onto the specified SharePoint site and send an email notification to the CO, COR, and Program Office listing all completed deliverables and a link to their location. Unless otherwise stipulated, written deliverables shall be phrased in plain English. Statistical and other technical terminology shall not be used without providing a glossary of terms and/or an acronym listing.

The Contractor shall be responsible for adhering to all pertinent VA standards as specified in the Functional Review PEMS-FR PWS. Submission of deliverables shall be in accordance with the PEMS-FR PWS specifications.

As noted within Table 1.0 Pre and Post Implementation Assessments, Pre and Post Implementation assessments take can be executed during each phase of a project development lifecycle depending on the size and complexity of a project. There will be a single generic deliverable, Pre Implementation Assessment that will be utilized to conduct the Pre-Deployment Assessment activities listed in the table below. Utilizing a generic deliverable type will help to lessen the number of deliverables that will need to be managed during the period of performance associated with the PEMS-FR.

Pre Implementation Assessments	
1. Project Baseline Review	1.0 Planning Phase
2. Baseline Operational Assessment	
3. Requirements Analysis Review	2.0 Design Phase
4. System Test Readiness Review	3.0 Implementation Phase
5. User Acceptance Test Readiness Review	
6. Operational Readiness Review	4.0 Deploy Phase

Table 3.0 Pre-Implementation Assessments

5.1 Phase 1 – Due Diligence

During phase 1, the contractor shall adhere to scoping direction and due diligence goals provided by PE when the engagement is initiated. The objective of the Due Diligence phase is to document engagement information in sufficient detail to allow a future project charter to be created and justify a full engagement (i.e., continuation to additional phases). Due Diligence output shall answer the following key questions:

- Who are the project sponsors and stakeholders?
- What problem(s) or challenge is the project trying to solve?
- What are VHA's choices?
- What will happen if we do nothing?
- How and when will we be able to measure success?
- Include the current industry standard and what needs to be done to close any gaps.

Due Diligence activities may include searching PE Lessons Learned content, literature searches, industry best practices, VA intranet and Internet searches, VHA directives, policies and procedures, Standard Operating Procedures, project supporting documentation and other applicable information that shall contribute valuable content to the Due Diligence. As part of the Due Diligence effort the FR team will need to determine if there is relevant information from past PE assessments that can be leveraged to support current FR efforts. The key to Due Diligence activities is to have a solid and comprehensive approach in place prior to meeting with subject matter experts.

This phase also requires contractor interaction with potential PE customers to collect and understand all relevant information required to develop a thorough understanding of the business case, or rationale for the engagement and the value to the enterprise of conducting the assessment. During this phase, the contractor shall gain an understanding of key objectives, goals, business needs, results to date, project risks and mitigation strategies, and benefit outcomes from pilot deployments (if applicable); in most cases, this will require interviews of subject matter experts and key stakeholders from various program offices, initiatives, and various work settings (e.g., clinical/health care delivery environment). The contractor shall verify assumptions, refine evaluation strategies, validate measurement plans, and/or pilot questionnaire content. The contractor shall facilitate, schedule, and document all meetings with program staff and potential customers.

Deliverables:

1.1 A detailed mission focused **Project Plan** to guide project direction to include roles and responsibilities of all stakeholders (e.g., project sponsor, primary point of contact, work group members, informed stakeholders), to be updated weekly. The project plan shall include the work breakdown structure (WBS) activities, deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the phase to successful completion. The project plan shall include an initial successful checkpoint with the Government PEMS-FR PM and PE Director prior to any work starting in any of the subsequent phases of the engagement and will be updated weekly and reviewed with the Government PEMS-FR PM and PE Director weekly.

1.2. Project Briefing: A presentation-style document that provides an executive summary of the project, including stakeholder information, goals, accomplishments, schedule, and other information relevant to the project engagement (i.e., the most relevant components of the Project Management Plan (del. 1.3)). This deliverable shall be updated at key milestones, as identified in the project plan, throughout the engagement. This deliverable is to be written in a concise format intended for presentation to senior program leaders and top level agency leadership.

1.3 Project Management Plan: This document describes the PEMS-FR engagement project in relation to the specific PE customer/initiative supported by the engagement. It includes all information needed to successfully initiate, execute, and complete the PEMS-FR engagement. This document provides the documented history of the Due Diligence phase, including the results of all tasks. It shall include details on stakeholders, lists and locations of all collected documentation, engagement requirements, results obtained from interviews and/or due diligence data collection activities, potential issues, risks and mitigation strategies, and all other relevant information, including recommendations for future PEMS-FR phases and/or engagements. The Project Management Plan shall include an executive summary of findings to include the bottom line up front. Due Diligence output shall include a description of the current and future states, project goals, current strategies to measure success, existing policies, processes, business rules, a description of what is working well and opportunities for improvement.

Due Diligence output shall identify potential project engagement opportunities for all PE domains and be described and prioritized based on value, impact, scope, cost, objective of the engagement identified and an assessment of the stakeholder's desire for PE services. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be described in sufficient detail to support creation of a future project charter and justify a full engagement (i.e., continuation to additional phases). A discussion of project timeframes benefit(s), measurement grouping(s) and metrics and data sources shall be included and all items identified along with a draft methodology for collection of both quantitative and qualitative data.

This deliverable will also identify key checkpoints required to successfully complete each phase of the respective PEMS-FR project. These checkpoints shall be included in the project management plan and have a related milestone.

Checkpoint: For the due diligence phase to be completed a checkpoint with the PEMS-FR Government Program Manager, other domains involved in the engagement and PE Director shall be successfully completed prior to proceeding to the next phase.

1.4 Meeting Agendas: Agendas of all meetings related to the phase. Described in the PEMS-FR P&P document (Attachment C). This is a "Roll Up" deliverable.

1.5 Meeting Minutes: Minutes of all meetings related to the phase. This is a "Roll Up" deliverable repeated throughout the engagement.

1.6 Action Items Log: A listing of all action items related to the phase, to include all relevant information, such as the item description, owner, due date, completion date, and notes related to the items. This deliverable is a living document updated weekly and provided during project management meetings.

5.2 Phase 2 – Project Baseline Review (PBR)

Deliverable 2.1: Project Baseline Review Risk Assessment

This deliverable includes all services required to perform the Project Baseline Review (PBR) of a given program, including gathering relevant project artifacts and reviewing the project's set of existing document artifacts and performance measurement baseline initially developed for the engagement project. The document deliverable is a Risk Assessment of the engagement project based on this review, and a zip file of all artifacts reviewed. The risk assessment report will contain a list of risks that have been compiled through the project baseline review process. The risks contained within this report will be categorized as High, Medium or Low depending on the impact they have to the success of the project along with an associated mitigation recommendation.

5.3 Phase 3 - Baseline Operational Assessment

Deliverable 3.1 Project Baseline Usability Report:

This deliverable includes all services required to perform the Baseline Operational Assessment, including gathering relevant project artifacts and reviewing the project's set of existing document artifacts for the engagement project. The document deliverable is a Project Baseline Usability Report of the engagement project based on this review, and a zip file of all artifacts reviewed.

Deliverable 3.2: Workshop Materials

Perform workshop to include deliverable of the package of documents for PBR Workshop, including agenda, minutes, interview reports, copies of collected read-ahead materials, and all other relevant materials to perform the Functional Review workshop.

Deliverable 3.4: Baseline Operational Assessment

It is essential to document the current "as-is" system and user processes and procedures before implementing a new system to validate that the requirements are complete. PE will conduct a BOA early in a project's SDLC, before a new system goes into production, to provide VHA IT project teams with a clear and detailed representation of the current system functions and the business process workflows. Working with subject matter experts (SME) to create an informative and comprehensive BOA, PE will conduct interviews, workshops, and observe the current processes,

while documenting the functions of the current system, their impact to the workflow, including efficiencies as well as the manual workarounds.

The BOA provides a detailed representation of the current “as-is” system and workflows before the new system is implemented. Prior to performing the BOA, FR will meet with customers to determine the scope and level of effort; identify all stakeholders required to be engaged with the assessment, and set expectations for the BOA. Through this scoping exercise, the FR team will determine and document the most critical systems and processes in order to provide the highest value to the customer. The FR team will also work with the project stakeholders to determine the optimal number of facilities to visit in person and separate the ones that can be assessed remotely.

In preparation for a site visit, FR will engage in a due diligence exercise that consists of reviewing available documentation, building questionnaire list, and identifying roles of the SMEs required for interviews as well as the preliminary workflows. The goal of this exercise is to maximize the efficiency of the knowledge capture while on the ground, as well as minimizing the time required with the SMEs. Prior to the visit, the PE team will prepare and send/confirm read-ahead materials, onsite dates, and agendas with stakeholders, and work with onsite contacts to identify current system SMEs.

Once onsite, FR will hold a kick-off meeting to communicate the purpose of the visit to the SMEs, site leadership, and other stakeholders. The PE team will also confirm scope, goals, and provide a walk through the proposed agenda. FR will meet with SMEs to perform interviews, observe current processes, collect feedback on the system’s functions and current workarounds in order to document workflows, and identify use-cases based on the current “as-is” system and user processes. FR will conclude the site visit with an out-brief meeting to reiterate what was accomplished, discuss observations or lessons that were captured, identify next steps, and allow the stakeholders to ask any questions. Shortly after the site visit, FR will develop initial drafts and follow up with the SMEs to continually improve and validate its understanding of the workflow processes.

The BOA report will be developed based on the information assembled from observation and interviews with SMEs while onsite and in remote working sessions. The report will typically include workflow diagrams and descriptions, detailed use cases (based on points in the workflows), system functionality overview, and system impacts on the user processes, followed by a conclusion.

The Impact Analysis is conducted after the baseline workflow assessment to compare current processes against proposed future processes. By making the comparison, the PE FR team can assess potential investment impacts. The Impact Analysis is comprised of the following components:

- **Workflow Title:** Define the Workflow Title - Creating titles for every step in the process for Joint Registration.

- **Current Processes:** Define List of Current Processes - Defining processes helps correctly identify what occurs during each step of the current workflow.
- **Systems/Services in Use:** Define List of Systems/Services Used in the Processes - Defining all services within the solution that are used to complete each workflow step.
- **Inputs/Outputs:** Data leveraged during the process – Identify all data categories that are entered or that result from each step throughout the process.
- **Actors/Roles:** Define Who Completes the Task - The person who completes each workflow step needs to be defined.
- **Functional/Business/Clinical Benefits:** Identification of Functional Benefits - Identifying functional benefits allows for the identification of gaps in functionality as well as high impacted areas.
- **Potential Risks:** Identify Potential Risks - Raising risks and providing recommendations allows end users to define current risks and any potential challenges affecting the current workflow.
- **Impact Significance:** Identifying the Significance of the Impact - Defining the order of magnitude of the impact to understand which current risks are more significant.

5.4 Phase 4 – Requirements Analysis Review (RAR)

Deliverable 4.1: Requirements Analysis Review Assessment

This deliverable includes all services required to perform the Requirements Analysis Review (RAR), including gathering relevant project artifacts and reviewing the project's set of existing document artifacts developed for the engagement project, and performing the Functional Review Checkpoint Assessment. The document deliverable will contain a Process Effectiveness Assessment and/or Risk Assessment of the engagement project based on this review, and a zip file of all artifacts reviewed. The risk assessment portion of the report will contain a list of risks that have been compiled through the Requirements Analysis Review process. The risks will be categorized as High, Medium or Low depending on the impact they have to the success of the project along with an associated mitigation recommendation.

5.5 Phase 5 – System Test Readiness Review (STRR)

Deliverable 5.1: System Test Readiness Assessment

This deliverable includes all services required to perform the System Test Readiness Review (STRR), including gathering relevant project artifacts and reviewing the project's set of existing document artifacts developed for the engagement project, producing a Validation Checklist work product, and performing the STRR assessment. The document deliverable is a System Test Readiness Assessment including recommended changes to the test plan, test cases, test scripts and requirement traceability matrixes etc. scripts, of the engagement project based on this review, and a zip file of all artifacts reviewed.

Deliverable 5.2 Usability Assessment Report

This deliverable includes all services required to perform a Usability Assessment of the application during the system test phase of the project to ensure that it will meet the stakeholder's functional requirements. The deliverables will include a Usability Assessment report that will contain observed gaps in functional requirements and any recommendations to improve the application along with a zip file of all artifacts reviewed.

Deliverable 5.3: System Test Readiness Review Risk Assessment

This deliverable includes all services required to perform the System Test Readiness Review (STRR) Risk Assessment, including gathering relevant project artifacts and reviewing the project's set of existing document artifacts developed for the engagement project, and performing the Risk Assessment. The document deliverable is a STRR Risk Assessment of the engagement project based on this review, and a zip file of all artifacts reviewed.

5.6 Phase 6 – Implementation Phase

Deliverable 6.1: Implementation Readiness Review User Acceptance Testing - Risk Assessment

This deliverable includes all services required to perform the Implementation Readiness Review (IRR)/User Acceptance Testing (UAT) Risk Assessment, including gathering relevant project artifacts and reviewing the project's set of existing document artifacts developed for the engagement project, and performing the Risk Assessment. The document deliverable is an IRR/UAT Risk Assessment of the engagement project based on this review, and a zip file of all artifacts reviewed.

5.7 Phase 7 – Operational Readiness Review (ORR)

Deliverable 7.1: Operational Readiness Review Risk Assessment

The Operational Readiness Review (ORR) is conducted during the Deployment Phase of the SDLC and is intended to serve three primary purposes. First, the ORR provides a checkpoint to ensure that all of the processes needed to successfully deploy and maintain the solution in production have been identified. Second, the ORR validates that the identified processes are completed. The final objective of the ORR is to achieve concurrence, via a "Go or No Go" decision, that the product is ready for release into the production environment for sustained operations and maintenance support.

The ORR will identify and reduce critical risks as they relate to deployment planning, deployment communications planning, and system operations and maintenance. One of the primary tools used to facilitate this is the Operational Readiness Checklist. The Operational Readiness Checklist is developed in partnership with the solution's deployment team in order to capture all of the tasks

in logical sequence that need to be performed during pre-deployment, deployment, and post deployment phases of the project. The checklist is updated by the project lead or manager at each medical facility in order to confirm that all critical activities have been completed. The completed Operational Readiness Checklists are uploaded into a main repository, aggregated, and summarized into a dashboard that can be used by management to access the overall status of the implementation and determine which medical facilities need additional assistance.

As part of the Operational Readiness Review, the FR team may evaluate the training plan, materials, and processes and procedures to provide analysis and recommendations on the execution of training activities. FR will review all training materials and meet with project POCs and site stakeholders to gather the required information to perform their evaluation. The team will then incorporate their findings into the ORR reports and conduct presentations to communicate their findings to all relevant stakeholders.

FR will deliver a Risk Assessment document as part of the ORR that identifies any critical risks or gaps in operational processes. Additionally, FR will apply lessons learned from previous or similar implementations to enable further improvements in effective system operations. During the ORR, the following project artifacts are typically assessed:

5.8 Phase 8 – Product Usability Assessment and Post Implementation Review (PIR)

Deliverable 8.1 Post Implementation Review Gaps Analysis and Recommendations Report:

This deliverable includes all services required to perform the Post Implementation Review (PIR) Gaps Analysis and Recommendations Report, including gathering relevant project artifacts and reviewing the project's set of existing document artifacts developed for the engagement project, and Creating the Gaps and Recommendations Report. The document deliverable is a PIR Gaps and Recommendations Assessment of the engagement project based on this review, and a zip file of all artifacts reviewed.

Once a product has been deployed, the FR team will perform a review to assure the functionality and goals desired were actually achieved. The main purpose of the PIR is to verify that functional and business requirements are being met, observe system performance, gauge the usability of the product and its effect on user adoption, and uncovers areas of opportunities and improvements moving forward.

Deliverable 8.3: Product Usability Assessment

This deliverable includes all services required to perform a Usability Assessment of the application during the post implementation phase of the project to ensure that it will meet the stakeholder's functional requirements. The deliverables will include a Usability Assessment report that will

contain observed gaps in functional requirements and any recommendations to improve the application along with a zip file of all artifacts reviewed.

Deliverable 8.4: Engagement Valuation Report

The contractor shall develop an engagement valuation report including an executive summary, summary of results, engagement overview, and recommendations. The contractor will work collaboratively with other PE domains and government resources to develop consistent measurements that will be used to monetize the results of from PE engagement reports using various methods, such as determining the delta in efficiencies before and after a project's implementation. This effort will help to ensure the return on the VA's investment is understood. The report appendix shall clearly outline the specific steps used to complete the engagement. This report will utilize the VHA Measurement Framework Application Interface tool that has been previously developed to calculate the quantitative and qualitative metrics to determine the realized benefits of the engagement and to compare the quantitative and qualitative value of this engagement against other VHA engagements. This tool performs automated normalization of data to allow for benefit and measurement comparisons across all engagements, regardless of the data collection methodology.

Deliverable 8.5: Operational Effectiveness Assessment

The contractor shall develop an Operational Effectiveness report including an executive summary, summary of results, engagement overview, and recommendations. The report will document and analyze the current workflow processes to include but not limited to Revenue Cycle Management, Consolidated Flow Management (CFM), Workforce Management, administration etc. The objective of this effort is to better understand the current VHA environment, process integration and to document where efficiencies could be implemented within future state workflow processes. The contractor is expected to work with PE leadership, as well as conduct due diligence activities (research, interviews, etc.) with identified subject matter experts for the engagement to identify, document and analyze VHA workflow processes.

5.9 Phase 9 – Lessons Learned

Deliverable 9.1: Program Improvement Recommendations

A document deliverable that describes the comprehensive lessons learned from the phases conducted for the customer engagement. The lessons learned meet the requirement described in the PEMS-FR PWS, and shall make specific change recommendations to the Functional Review CONOPS, P&P, and Roles & Responsibilities documents. Copies of these documents illustrating recommended changes shall be included as a part of this deliverable.

Deliverable 9.2: Functional Review Engagement Management Report

This deliverable is an Executive Summary document and PowerPoint presentation document of the engagement or specific portions of the engagement which provides VHA leadership with evidence and actionable recommendations for improving the delivery of future similar customer projects.

5.10 Phase 10 – Engagement Program Management

Deliverable 10.1: Project Strategy

This deliverable is an overall engagement strategy which takes into account the needs of the customer and interaction with all other PE domains to provide the planned value to the engagement customer. The strategy shall include planned milestones and deliverables and all services to develop and finalize the strategy with PE and the engagement customer.

Deliverable 10.2: Project Plan

This deliverable is the Project Plan for the Functional Review engagement and includes service and delivery milestones and significant tasks to meet those milestones, and shall note dependencies within the engagement as well as with other Functional Review engagements and activities of the other PE domains. The project plan shall be updated weekly, depending upon changes to the plan.

Deliverable 10.3: Weekly Status Report

This deliverable is a weekly report of status of milestones and accomplishments, and shall include actions, issues, and risks. This report shall serve as the agenda for the weekly Functional Review status meeting.

Deliverable 10.4: Monthly Accomplishments Report

This deliverable is a service to update the report of accomplishments for the engagement. Engagement accomplishments may be reported as “track changes” updates to the PE Monthly Report, and all engagements may be reported within the same document. Work Products and Deliverables produced during the reporting period shall be listed in the Monthly.

Deliverable 10.5: Functional Review Program Pipeline Strategy

Update of the Functional Review Program Pipeline Strategy based upon the engagement, and shall include recommendations for provision of PE services to current or potential engagement customers.

Deliverable 10.6: Work Products

All documents which are not “Deliverables” are “Work Products” produced during the course of the engagement. Work Products include meeting agendas, minutes, action item lists, checklists,

presentations, memoranda and other such documentation produced to support the engagement. Work Products produced over the course of the engagement shall be delivered as one package in .zip file format.

Deliverable 10.7: Engagement Report

This deliverable is the Final Engagement Report which documents all findings and recommendations of the engagement, with the engagement customer as the primary audience. It shall contain an Executive Summary written to be used independently from the larger report.

Deliverable 10.8: Engagement Self-Assessment

This deliverable is a self-assessment of the engagement, based on planned and realized value. This deliverable shall demonstrate the objective and subjective value of the Functional Review Engagement to the customer. This shall include assessment of planned versus actual value of the engagement from the customer's perspective and illustrate the return on investment to VHA for the PE Program.

Deliverable 10.9: Guidance Documents and Templates

Set of guidance documents and templates relevant to each SDLC phase. This deliverable includes updating and organizing the existing Sharepoint library which serves as the guidance and template resource for Functional Review customers.

Deliverable 10.10: Customer Brief

A presentation-style document that provides an executive summary of the project, including stakeholder information, goals, accomplishments, schedule, and other information relevant to the project engagement/phase, as well as presentation of the information during customer meetings.

6.0 Schedule of Deliverables

1.4 6.1 Requested Deliverables

Deliverable	Qty	Unit	Unit Price	Total Price
Functional Review Task Phase 1 (Engagements 1, 2, & 3)				

Deliverable	Qty	Unit	Unit Price	Total Price
1.1: PE Introduction Project Briefing-High LOE	5	ea	\$	\$
1.1: PE Introduction Project Briefing-Medium LOE	5	ea	\$	\$
1.1: PE Introduction Project Briefing-Low LOE	3	ea	\$	\$
1.2: Project Management Plan-High LOE	5	ea	\$	\$
1.2: Project Management Plan-Medium LOE	5	ea	\$	\$
1.2: Project Management Plan-Low LOE	3	ea	\$	\$
Functional Review Task Phase 2 (Engagements 1 & 2)				
2.1: Project Baseline Review Risk Assessment-High LOE	1	ea	\$	\$
2.1: Project Baseline Review Risk Assessment-Medium LOE	1	ea	\$	\$
2.1: Project Baseline Review Risk Assessment-Low LOE	1	ea	\$	\$
Functional Review Task Phase 3 (Engagement 1)				
3.1: Project Baseline Usability Report-High LOE	3	ea	\$	\$
3.1: Project Baseline Usability Report-Medium LOE	3	ea	\$	\$
3.1: Project Baseline Usability Report-Low LOE	2	ea	\$	\$

Deliverable	Qty	Unit	Unit Price	Total Price
3.2: Workshop Materials-High LOE	6	ea	\$	\$
3.2: Workshop Materials-Medium LOE	0			
3.2: Workshop Materials-Low LOE	0			
3.4 Baseline Operational Assessment-High LOE	7	ea	\$	\$
3.4 Baseline Operational Assessment-Medium LOE	7	ea	\$	\$
3.4 Baseline Operational Assessment-Low LOE	7	ea	\$	\$
Functional Review Task Phase 4 (Engagement 1)				
4.1: Requirements Analysis Review Assessment-High LOE	3	ea	\$	\$
4.1: Requirements Analysis Review Assessment-Medium LOE	3	ea	\$	\$
4.1: Requirements Analysis Review Assessment-Low LOE	0	ea	\$	\$
Functional Review Task Phase 5 (Engagement 1)				
5.1: System Test Readiness Assessment-High LOE	2	ea	\$	\$
5.1: System Test Readiness Assessment-Medium LOE	1	ea	\$	\$
5.1: System Test Readiness Assessment-Low LOE	0	ea	\$	\$
5.2: Usability Assessment Report-High LOE	0	ea	\$	\$

Deliverable	Qty	Unit	Unit Price	Total Price
5.2: Usability Assessment Report-Medium LOE	0	ea	\$	\$
5.2: Usability Assessment Report-High LOE	0	ea	\$	\$
5.3: System Test Readiness Review Risk Assessment-High LOE	0	ea	\$	\$
5.3: System Test Readiness Review Risk Assessment-Medium LOE	0	ea	\$	\$
5.3: System Test Readiness Review Risk Assessment-Low LOE	0	ea	\$	\$
Functional Review Task Phase 6 (Engagement)				
6.1: Implementation Readiness Review /User Acceptance Testing Risk Assessment-High LOE	0	ea	\$	\$
6.1: Implementation Readiness Review /User Acceptance Testing Risk Assessment-Medium LOE	0	ea	\$	\$
6.1: Implementation Readiness Review /User Acceptance Testing Risk Assessment-Low LOE	0	ea	\$	\$
Functional Review Task Phase 7 (Engagements 1 & 3)				
7.1: Operational Readiness Review Risk Assessment-High LOE	1	ea	\$	\$
7.1: Operational Readiness Review Risk Assessment-Medium LOE	1	ea	\$	\$
7.1: Operational Readiness Review Risk Assessment-Low LOE	0	ea	\$	\$

Deliverable	Qty	Unit	Unit Price	Total Price
Functional Review Task Phase 8 (Engagements 1 & 3)				
8.1: Post Implementation Review Gaps Analysis and Recommendations Report-High LOE	8	ea	\$	\$
8.1: Post Implementation Review Gaps Analysis and Recommendations Report-Medium LOE	8	ea	\$	\$
8.1: Post Implementation Review Gaps Analysis and Recommendations Report-Low LOE	2	ea	\$	\$
8.3: Product Usability Assessment-High LOE	3	ea	\$	\$
8.3: Product Usability Assessment-Medium LOE	4	ea	\$	\$
8.3: Product Usability Assessment-Low LOE	2	ea	\$	\$
8.4: Engagement Valuation Report-High LOE	2	ea	\$	\$
8.4: Engagement Valuation Report-Medium LOE	0	ea	\$	\$
8.4: Engagement Valuation Report-Low LOE	0	ea	\$	\$
8.5: Operational Effectiveness Assessment- High LOE	2	ea	\$	\$
8.5: Operational Effectiveness Assessment - Medium LOE	0	ea	\$	\$
8.5: Operational Effectiveness Assessment - Low LOE	0	ea	\$	\$

Deliverable	Qty	Unit	Unit Price	Total Price
Functional Review Task Phase 9 (Engagements 1 & 3)				
9.1: Program Improvement Recommendations- High LOE	8	ea	\$	\$
9.1: Program Improvement Recommendations-Medium LOE	0			
9.1: Program Improvement Recommendations- Low LOE	0			
9.2: FR Engagement Management Report- High LOE	8	ea	\$	\$
9.2: FR Engagement Management Report-Medium LOE-	0			
9.2: FR Engagement Management Report-Low LOE	0			
Functional Review Task Phase 10 (High LOE Across Engagements)				
10.1: Project Strategy	7	ea	\$	\$
10.2: Project Plan	7	ea	\$	\$
10.3: Weekly Status Report	1	ea	\$	\$
10.4: Monthly Accomplishments Report	1	ea	\$	\$
10.5: FR Program Pipeline Strategy	1	ea	\$	\$
10.6: Work Products	7	ea	\$	\$
10.7: Engagement Report	7	ea	\$	\$
10.8: Engagement Self-assessment	7	ea	\$	\$

Deliverable	Qty	Unit	Unit Price	Total Price
10.9: Guidance Documents and Templates	1	ea	\$	\$
10.10 Customer Briefing	13	ea	\$	\$
Travel (2 travelers, 3 days)	18	ea	\$	\$
Total (1.1 through 10.9)				\$