



DEPARTMENT OF VETERANS AFFAIRS

VETERANS HEALTH ADMINISTRATION

PERFORMANCE WORK STATEMENT

Product Effectiveness Measurement Services Contract

Draft

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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, lessons learned, and product effectiveness measurement services. PE's Product Effectiveness Measurement Services (PEMS) focuses on the planning, collection of data, analysis and reporting of business benefits on significant programs, processes, technology, and medical products from VA stakeholders to measure their effectiveness and help improve them. The program is responsible for developing comprehensive evaluation plans; planning and performing data collection; comprehensive analysis; identifying impacts, correlations and benefits being realized; and reporting of business benefits and business value on significant programs, processes, technology, and medical products. Within the past year, PE's involvement in measurement of programs has evolved from the previous focus on products and individual programs to include measurement of the highest priority VA initiatives. Results from PE projects support VA stakeholders at the highest executive level of VA to measure these programs' effectiveness and make recommendations on improving their performance. Objectives include validating investment decisions, providing accountability, and supporting continuous improvement of VHA mission critical health information and informatics projects. The subject matter of the work described in the Performance Work Statement (PWS) involves measurements, findings, and recommendations related to the highest priority initiatives within the Department of Veterans Affairs to include the VA Community Care initiative and other VA health care initiatives. As such, the results of the advisory and assistance produced via this contract, meaning the contractor's findings and recommendations, shall be developed using a rigorous process to ensure they are suitable for use 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 Product Effectiveness Measurement Services (PEMS) engagements for the VHA Product Effectiveness Program. This Scope of Work describes services required to support the goals and objectives of the PE organization.

2. CONTRACT SCOPE:

The VHA PE program office is establishing a contract for Product Effectiveness Measurement Services (PEMS) to focus on healthcare related business processes investments, improvements and/or changes requiring measurement to identify realization of expected benefits from a business value perspective. The contractor shall perform this work in various work settings to include clinical/healthcare delivery environments, administrative, operational and logistical environments. PE uses a rigorous process to conduct their assessments which ultimately informs 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. The contractor is required to exercise critical thinking, perform deep analysis, provide comprehensive and detailed problem

statements and hypothesis and articulate the messaging of salient information at an executive level which includes bottom line up front information in plain language from a business value perspective. Communications of complex subject matter findings regarding the business value of health care, workflow knowledge, and business rules to inform decision making which has far-reaching impact on national programs such as the provision of health care services to all Veterans must be accurate and include credible evidence based information. It is imperative that PE has the level of expertise that is needed to fulfill their mission. This will require the Contractor to provide services to successfully initiate, plan, and execute projects, also referred to as Engagements. Activities to be performed include the following:

- a) Effectively and successfully initiate, facilitate, plan and execute complex Product Effectiveness Measurement Services (PEMS) projects. This includes exercising critical thinking and performing deep analysis to understand the business process workflow and identify and document the impact areas of the as is and to be state. Uncover and understand business rules, success factors and Key Performance Indicators (KPIs). Obtain data for both qualitative and quantitative measures and show their value. Identify and demonstrate foundational benefits and correlate all of the data as appropriate. Identify and understand interdependencies and core competencies. Reports show a logical flow of analysis and include foundational benefits (e.g. Is the system installed?), functional (e.g. Does the system work?), adoption, (e.g. Are staff using the system?), operational (e.g. Is the system more efficient?) and strategic benefits (e.g. Are users satisfied?). Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are realized. Reports also should show measurement groupings and metrics and their values written in an executive leadership format and include the source of the data. Salient information is captured, identified, defined, articulated and messaged appropriately from a business value perspective. To successfully execute this contract both health care expertise and business acumen is needed.
- b) Gather and examine information from multiple stakeholders and sources, this may include but is not limited to: interviews with the PE Director and program managers, all subject matter experts that would have information related to the project such as clinical, business, managerial and technical staff; databases; literature searches, industry best practices, reports, and gathering information from the sites and the clinical environment. Stakeholders also represent numerous work settings, including: clinical/health care delivery environments, administrative, operational, and logistical. Once information is reviewed it is aggregated then disseminated in a logical, detailed and timely manner, sources are identified and referenced.
- c) Data collected depends on the engagement requirements and may be of a qualitative and/or quantitative nature. Qualitative data shall be collected by use of various modalities; including: literature searches, comparative analysis to industry standards,

data calls, site visits, questionnaires, interviews, focus groups, data collected by other organizations, or similar methods. Quantitative data shall be collected from existing or created databases/data cubes, questionnaires, manual data collection, observations or similar methods, as necessary. Where applicable, data correlations and interdependencies will need to be identified and/or analyzed. Qualitative data, facts or factors that affect the measurement can, in some cases, be quantitatively measured (e.g. If 20 staff report qualitatively that a process step takes between 5-7 minutes, then that can be measured quantitatively). Due to the subject matter both health care and business acumen experience is needed to perform this task, this includes communication, collaboration, identifying and documenting relevant information.

- d) Create specific deliverables for the purposes of administering, documenting, reporting, analyzing, and communicating the results and to support continuous process improvement. Interim and final deliverables are created to inform executive leadership and must be articulated and messaged with salient information to include bottom line up front information from a business value perspective. Many deliverables are used as building blocks to other deliverables, therefore it is imperative that deliverables are executed successfully in a timely manner so as to not to delay the engagement.

The subject matter of the Product Effectiveness Measurement Services (PEMS) engagements will be chosen based on the needs of the PE program in its support of VHA Strategic Goals. Product Effectiveness Measurement Services (PEMS) engagements are performed for Product Effectiveness with PE being the primary customer. Product Effectiveness will be the determinant of the quality of deliverables per the quality measures in the contract Quality Assurance Surveillance Plan (QASP). Product Effectiveness has the ultimate authority to determine if engagement processes and deliverables are deemed satisfactory. Product Effectiveness Measurement Services (PEMS) engagements are supported by project stakeholders who are defined as a person or group who has a vested interest in the engagement subject matter (Ex. user working group members, subject matter experts etc.) Stakeholders do not have the authority to determine if engagement processes and deliverables are deemed satisfactory. Product Effectiveness is the customer of this contract and Product Effectiveness determines if deliverables are of acceptable quality, not the stakeholders.

Engagement Descriptions

Engagements are planned for the following VHA initiatives and/or program offices as well as emerging engagements during the contract period of performance:

- Veterans Choice Program (VCP)
- Office of VA Community Care
- Chief Business Office (CBO)
- Pharmacy Benefits Management
- VistA Evolution (VE) Electronic Health Management Platform (eHMP)

- VHA and Department of Defense (DOD) Data Interoperability
- Tele-Health -Patient Access to Care Related Initiatives
- Patient Flow Applications-Enhance Patient Access to Care
- VA Center for Innovation (VACI)
- Office of Connected Care
- Strategic Workforce Assessments
- Office of Patient Centered Care
- Office of Strategic Integration

Please note the listed engagements are examples of the planned subject matter and/or content of these services and are subject to change depending on the needs of the Product Effectiveness program. In the event any of the above planned engagements are changed, a comparable level of effort with comparable expertise for the new engagement(s) will be required regardless of the subject matter.

Quantity of Engagements and Phases Requested

Product Effectiveness Measurement Services (PEMS) engagements are generally classified into three sizes from a data collection effort perspective (or in the case of a Due Diligence, the effort required to complete the Due Diligence): Large, Medium, and Small. A large engagement generally involves engaging with multiple up to all VHA facilities and Veterans Integrated Service Networks (VISN) on a national level and collecting quantitative and/or qualitative data at a national level. A medium engagement involves engaging with half or less of all facilities (e.g. 10-50 facilities) and VISNs, often times measuring quantitative and/or qualitative data from a representative sampling of facilities and/or VISNs nationally. A small engagement generally involves engaging with fewer facilities (e.g. 1-5 facilities) or one Veterans Integrated Service Network (VISN) measuring quantitative and/or qualitative data from a smaller sample size.

Product Effectiveness offers various rigors of measurement services based on the engagement need. Levels of rigor apply to all sub-phases that precede the analysis/evaluation sub-phases. The level of rigor needed for an engagement is determined by the government Product Effectiveness staff. Levels of rigor are as follows:

- **Rigorous Measurement (High rigor)** - the purpose of a rigorous measurement is to produce a comprehensive measurement plan that describes methodology that will be used to gather performance data in order to objectively evaluate the degree to which the expected project benefits were achieved. An example would be a long-term evaluation of a program, product or process change and may be a baseline, interim, or post-deployment measurement. This also would include new initiatives and/or something that was not previously measured. A high rigor effort would be applicable to sub-phases 1.1-1.5 and 1.8-1.9.
- **Evaluation (Medium rigor)** - the purpose of an evaluation is to provide a rapid benefits realization assessment. It will include an evaluation plan that identifies

benefits, measurements and metrics. The plan will include descriptions, rationale, data sources, etc. of metrics which is validated with the subject matter experts and project stakeholders. This is presented in an abbreviated format vs. a comprehensive/rigorous measurement plan. An example would be a targeted evaluation that may be focused on a pilot and/or first iteration of a change at site(s), VISN(s), and/or program office(s). A medium rigor effort would be applicable to sub-phases 2.1-2.2 and 2.5-2.6.

- Assessment (Low rigor)-the purpose of an assessment is to determine effectiveness of change. It will not require a comprehensive measurement plan but instead will require a basic, structured assessment plan that defines a measurement approach that may serve as a pre-cursor to a comprehensive measurement plan. An example would be an engagement with a quick turnaround to validate benefits and/or viability of a product. The assessment could be a Post Implementation Review, Root Cause Analysis, Lessons Learned retrospect, etc. A low rigor effort would be applicable to sub-phase 3.1.

Each engagement always has at least one phase and sub-phase but may require multiple sub-phases. For example, one large engagement may consist of only one sub –phase 1.1 Due Diligence, while another may require sub-phases 1.1-1.7. The Product Effectiveness Measurement Services (PEMS) Program Manager will assign each phase and sub-phase during the course of each engagement. In accordance with the Product Effectiveness Measurement Services (PEMS) Process & Procedures (P&P) document, the Contractor shall provide the Task Phases listed below.

Table 1: Engagements

The quantities of Task Phases, levels of effort and rigor described below relate to several planned engagements. As stated previously, Task Phases may be assigned individually and the allocation described may differ from this plan depending upon Product Effectiveness strategic needs.

Phase #	Phase Name	Level of Effort		
1	Rigorous Measurement (High rigor)			
	<i>Due Diligence Effort</i>	<i>Large</i>	<i>Med</i>	<i>Small</i>
1.1	Due Diligence	2	6	10
1.2	Plan Engagement	2		
1.3	Business Value Definition and Justification (BVDJ)	2		
1.4	Define Benefits	2		
1.5	Measurement Plan	2		
	<i>Data Collection Effort</i>	<i>Large</i>	<i>Med</i>	<i>Small</i>
1.6	Data Collection & Analysis	2	0	0
1.7	Reporting	2	0	0
	Rigorous Measurement: Post Implementation (High rigor)			
1.8	Post Implementation –Plan	2		

	Engagement			
1.9	Post Implementation-Measurement Plan Update	2		
Data Collection Effort		Large	Med	Small
1.10	Post Implementation-Data Collection & Analysis	0	2	0
1.11	Post Implementation-Reporting	0	2	0
Rigorous Measurement: Lessons Learned (High rigor)				
1.12	Lessons Learned	4		
Phase #	Phase Name	Level of Effort		
2	Evaluation (Medium Rigor)			
2.1	Evaluation-Engagement Plan	9		
2.2	Evaluation-Evaluation Plan	9		
Data Collection Effort		Large	Med	Small
2.3	Evaluation-Data Collection & Analysis Report	0	7	2
2.4	Evaluation-Final Report	0	7	2
Evaluation: Post Implementation (Medium Rigor)				
2.5	Evaluation-Post Implementation Engagement Plan	4		
2.6	Evaluation- Post Implementation Evaluation Plan Update	4		
Data Collection Effort		Large	Med	Small
2.7	Evaluation- Post Implementation Data Collection & Analysis Report	0	4	0
2.8	Evaluation- Post Implementation Final Report	0	4	0
Phase #	Phase Name	Level of Effort		
3	Assessment (Low Rigor)			
Data Collection Effort		Large	Med	Small
3.1	Assessment-Business Value Assessment Report	8	0	0
Program Management				
Contract Program Management		1		
Post Engagement Business Value Report		17		
Steering Committee and User Working Group Meetings		5		

- a. **Type of Order:** Firm Fixed Price: Payment amount does not depend on resources used or time expended.
- b. **Period of Performance (PoP):** This contract will have a Period of Performance (POP) Twelve (12) months from the date of award with Four (4) option years.

- c. **Place of Performance:** Washington D.C. Metropolitan area. The majority of the tasks under this PWS shall take place at the Contractor's site; however, some tasks may be performed at various Government facilities. Occasional in-person meetings within the metro area are required at the Program Manager's discretion. These meetings may take place at either contractor or government facilities. No work at any Government site shall take place on Federal holidays or weekends, unless directed by the Contracting Office.
- d. **Travel Requirements:** This is the typical 12 month travel related to a typical contract.

The government estimates the following trips will be required:

Estimated Locations	Estimated # of trips	Estimated # of contractor personnel per trip	Estimated # days per trip
St. Louis, MO	1	2	3
Manchester, NH	1	2	3
Boston, MA	1	2	3
Hampton, VA	1	2	3
Long Beach, CA	1	2	3
Birmingham, AL	1	2	3
Total	6		

All of the above locations and number of trips are subject to change based on engagement needs. Since the place of performance is the Washington, D.C. metropolitan area, travel funds shall not be used for travel to the place of performance, i.e., for personnel who are not stationed within this area.

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). 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.

3. SPECIFIC MANDATORY TASKS AND ASSOCIATED DELIVERABLES

The contractor shall perform engagements in accordance with the Product Effectiveness Measurement Services (PEMS) Process & Procedures (P&P) and Concept of Operations (CONOPS) documents. The purpose of the CONOPS is to describe the concept of operations for implementing the Product Effectiveness Measurement Services (PEMS) program. The CONOPS is a high level description of the Product Effectiveness Measurement Services (PEMS) program and is provided to the contractor to assist with understanding the context of the services in relation to the program. The purpose of the Product Effectiveness Measurement Services

(PEMS) Process & Procedures is to describe the procedures and expectations for administering Product Effectiveness Measurement Services (PEMS) engagements to measure VHA product and process changes. It is a detailed, step-by-step process by which Product Effectiveness Measurement Services (PEMS) engagement services and associated deliverables shall be completed.

Understanding of the program guiding documents, adherence to the processes, and program improvement activities are critical to successful performance of the contract and to providing consistent, quality services to the Product Effectiveness Measurement Services (PEMS) program.

Assignment of Contract Task Phases to Product Effectiveness Measurement Services (PEMS) Engagements: Product Effectiveness Measurement Services (PEMS) engagements do not necessarily contain each of the task phases sequentially. The Product Effectiveness Program Office supports many different VHA programs and initiatives that may be at various stages of completion. Each Task Phase will be assigned by the Program Manager (PM) individually or as a full engagement (multiple task phases) based on the project selected. The contractor shall confirm engagement stakeholders; scope, business value and assessment approach strategy with the PM and receive approval prior to commencing any Task Phase under the contract.

Services and Deliverables: Each Contract Task Phase consists of services in support of the Product Effectiveness Measurement Services (PEMS) program with associated deliverables related to the Task Phase and for providing documented results of the phase. The services and deliverables are described below and detailed within the schedule of deliverables. Program Management deliverables such as project plans, agendas, meeting minutes, etc. are included within each of the Task Phases.

Many deliverables are considered to be “living” documents, which shall be created in the first sub-phase where the deliverable is required and then the original deliverable is updated and delivered in subsequent sub-phases, when applicable. For example, if a Project Management Plan is first created in sub-phase 1.2, then this same Plan shall be updated and redelivered in subsequent sub-phases (e.g., additional stakeholders are added, timelines are adjusted, risks mitigated), as needed. For such living documents, the intent is to maintain a single such deliverable over the life of the project rather than having documents recreated for each sub-phase. Similarly, where indicated, other deliverables, such as Agendas, Meeting Minutes, and data are “Roll Up” deliverables of work products produced throughout the sub-phase. Roll Up deliverables such as data are also intended to be maintained as single deliverables over the life of the project

Phase 1: Rigorous Measurement (High Rigor-Sub-Phase 1.1-1.12): The purpose of a rigorous measurement is to produce a comprehensive measurement plan that describes the methodology that will be used to gather performance data in order to objectively evaluate the degree to which the expected project benefits were achieved. An example would be a long-term evaluation of a program, product or process change and may be a baseline, interim, or post-deployment measurement

Sub-phase: 1.1 Due Diligence

Product Effectiveness will provide scoping direction and due diligence goals at the start of the phase. The contractor shall adhere to scoping direction and due diligence goals provided by Product Effectiveness. The contractor shall utilize critical thinking to obtain pertinent and valuable information that would support and enhance the scope of the project. The contractor shall perform the prerequisite due diligence activities required to begin Product Effectiveness Measurement Services (PEMS) engagement planning based on a well thought out approach. 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:

- 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 include searching Product Effectiveness 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. 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 Product Effectiveness 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 evaluation plans, and/or pilot questionnaire content. The contractor shall facilitate, schedule, and document all meetings with program staff and potential customers.

Due Diligence output shall provide valuable feedback for Product Effectiveness to assist with identification of potential project engagement opportunities for all Product Effectiveness domains and be described and prioritized based on impact, scope, cost, objective of the engagement identified and an assessment of the stakeholder's desire for Product Effectiveness services will be reported. Potential project risks and mitigation strategies along with project sponsors and stakeholders will be described in sufficient detail to support and justify a full engagement (i.e., continuation to additional phases).

Deliverable 1.1.1: Project Plan: The contractor shall create a detailed mission focused project plan in a timely manner to guide Due Diligence project direction to include roles and

responsibilities of all stakeholders (e.g., project sponsor, primary point of contact, work group members, informed stakeholders), a scoping statement that includes the objective and approach, planned deliverables and development of a project baseline. The project plan baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.1.2: Research/Interview Plan and Log: The Research/Interview Plan and Log shall include a comprehensive and detailed problem statement and hypothesis with an interview and research plan that will require critical thinking to support acquiring required Due Diligence information focused on the business value of healthcare and will be updated as knowledge is acquired to insure the content is current. The interview plan shall include an adequate number of interviews to obtain the necessary information to include interviews with the Product Effectiveness Director and domain (Product Effectiveness Measurement Services (PEMS), Functional Review and Lessons Learned) leads, VHA Subject Matter Experts (SME), private sector SME's and any applicable SME who would contribute valuable content to the Due Diligence. The research plan shall include but not limited to searching Product Effectiveness 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. An interview log and research log shall be created listing all resources the contractor plans to interview and research. Both the interview plan and research plan shall be reviewed with and signed off by the Product Effectiveness Measurement Services (PEMS) Program Manager prior to any actions commencing on the plan. Once all interviews and research outlined in the plan have been completed justification for any interviews and research that was unable to be completed shall be reviewed with and signed off by the Product Effectiveness Measurement Services (PEMS) Program Manager.

Deliverable 1.1.3: Project Management Plan: The Due Diligence Project Management Plan shall document engagement information in sufficient detail to allow a future project charter and/or addendum to be created and justify a full engagement (i.e., continuation to additional phases). Due Diligence 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 state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Due Diligence Project Management Plan shall answer the following key questions:

- What problem(s) or challenge is the project trying to solve?
- What are VHA's choices?
- What will happen if we do nothing (include risks)?
- 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 output shall identify potential project engagement opportunities for all Product Effectiveness 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 Product Effectiveness 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.

The project management plan shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes a demonstration of the bottom line up front and enough of the independent analysis to be deemed credible.

Checkpoint: For the due diligence phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-phase: 1.2 Plan Engagement

The contractor shall perform the tasks to actively plan the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Plan Engagement phase is to complete the tasks necessary to successfully and completely plan and initiate a Product Effectiveness Measurement Services (PEMS) engagement focused on the business value of healthcare. The contractor shall create a detailed mission focused baseline project plan in a timely manner to guide the entire engagement's direction. The project plan will serve as the baseline for future project plan updates. The contractor shall create a project charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment.

A site visit planning report document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The site visit planning report shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow description of the current and future state created with input from the steering committee and user working group, a description of what is working well and opportunities for improvement, project goals, current strategies to measure success, interview questions and site visit guidelines. The site visit planning report shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. The contractor shall map site visits to an understanding of the business case and problem statements.

The Site Visit Planning Report shall include an Executive Summary Briefing that shall serve as the entrance briefing for site visits, kickoff presentation for the user working group, presentation for subject matter expert meetings and presentations to executive leaders. The Executive Summary Briefing shall be no longer than 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and articulates the messaging of salient information at an executive level which includes bottom line up front information in plain language from a business value perspective and enough of the analysis to be deemed credible.

Deliverable 1.2.1: Project Plan: The contractor shall create a detailed mission focused project plan in a timely manner to guide the entire engagement's direction to include roles and responsibilities of all stakeholders, a scoping statement, planned deliverables and development of a project plan baseline and approach. This project plan will serve as the baseline project plan for future project plan updates. The project baseline shall include the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall include all planned site visits. The project plan shall have ample detail to demonstrate that the contractor has the correct approach and appropriate level of effort needed for successful completion of the engagement. This project plan is not a deliverable schedule. The project plan shall include an initial successful checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.2.2: Charter and/or Addendum: The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.

Deliverable 1.2.3: Steering Committee and User Working Group Presentations: Steering Committee and User Working Group Presentations shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare. Meeting presentations shall drive to an understanding of the current and future state, existing policies,

processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.

Deliverable 1.2.4: Initial Workflows: Initial workflow description(s) shall be created to compare the as is and to be state from the business role perspective in preparation for validation at future site visits. Applicable processes known during this phase drive creation of initial workflows and are accurately documented. The points of process variation (impacts), potential points of failure, differences between the as is and to be state will be identified and used as key points of focus for measurements. Initial workflows will be created from a business value perspective to include applicable use cases and various applicable scenarios. Potential points of initial workflow failure will be identified. The contractor shall gather initial workflow information from existing work flows, user working groups, SME's, workflows created by other domains such as Functional Review (FR) and other applicable sources to inform the creation of the initial Product Effectiveness Measurement Services (PEMS) initial workflow. For the initial workflow to be completed a checkpoint with the Product Effectiveness stakeholders prior to proceeding shall be completed.

Deliverable 1.2.5: Site Visit Planning Report: A site visit planning report document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The site visit planning report shall require critical thinking to support acquiring required information focused on the business value of healthcare. The site visit planning report shall include all information needed to prepare for a site visit. The site visit planning report shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow description of the current and future state created with input from the steering committee and user working group, a description of what is working well and opportunities for improvement, project goals, current strategies to measure success, interview questions and site visit guidelines. The site visit planning report shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. The contractor shall map site visits to an understanding of the business case and problem statements.

The Site Visit Planning Report shall include an Executive Summary Briefing that shall serve as the entrance briefing for site visits, kickoff presentation for the user working group, presentation for subject matter expert meetings and presentations to executive leaders. The Executive Summary Briefing shall be no longer than 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and articulates the messaging of salient information at an executive level which includes bottom line up front information in plain language from a business value perspective and enough of the analysis to be deemed credible. The site visit planning report and Executive Summary Briefing will serve as the deliverable for the checkpoint at the end of the phase.

Checkpoint: For the plan engagement phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed at the end of this phase prior to proceeding to the next phase.

Sub-Phase: 1.3 Business Value Definition and Justification

The contractor shall perform the tasks to understand the Business Value Definition and Justification for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Business Value Definition and Justification phase is to understand and describe the business case and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case and expected benefits can be enhanced to assist with resolution of the problem.

The contractor shall demonstrate a thorough and comprehensive understanding of the business case to include a complete and thorough understanding of the problem statement and hypothesis, business drivers, project goals, use case scenarios, process description(s), workflow description of the current and future state, a description of what is working well and opportunities for improvement, project related policies, processes, business rules, business control points and potential points of failure and current strategies to measure success, expected project benefits and Key Performance Indicators (KPI's). This understanding shall be validated by the site visits(s) that occur in this phase. The Business Value Definition and Justification Phase shall require critical thinking to support Product Effectiveness in acquiring required information for successfully understanding the business case and healthcare business value of the engagement.

Deliverable 1.3.1: Project Plan Update: The contractor shall update the baseline project plan created in *Sub-Phase 1.2-Plan Engagement-Engagement Project Plan* to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.3.2: Final Workflows: Detailed and final product workflow description(s) shall also be created that compares the as is and to be state from the business role perspective. The points of process variation (impacts) between the as is and to be state will be identified and used as key points of focus for measurements. Final workflows will be created from a business value perspective to include applicable use case and various applicable scenarios along with initial business rules. Potential points of final workflow failure will be identified.

Workflows created by other domains such as Functional Review (FR) shall be leveraged to inform the creation of the Product Effectiveness Measurement Services (PEMS) final workflow. Input from site visits will also be used to assist with creation and validation of workflows, various scenarios and use cases, validation of executive messaging and overall business value. The contractor shall utilize the final workflow to validate the messaging and context for how

measures relate to one another. For the final workflow to be completed a checkpoint with the Product Effectiveness stakeholders prior to proceeding shall be completed.

Deliverable 1.3.3: Report: The contractor shall develop the Business Value Definition and Justification report, in MS WORD. The Business Value Definition and Justification report shall be created to set up the hypothesis and framing of the expected outcome(s) and shall contain the beginning of the framing of baseline messaging. The Business Value Definition and Justification report is created with the purpose of developing and demonstrating a complete and thorough understanding of the problem statement, project related policies, processes, business rules, business control points and potential points of failure. This understanding shall be validated by the site visits(s) that occur in this phase. All information learned and validated at the site visit(s) shall be included in the report in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress. The contractor shall also demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met.

Expected project benefits shall be clearly articulated along with measurement approaches, success factors and KPI's. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall develop "what if" scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced. The Business Value Definition and Justification Report shall include an Executive Summary that is no longer than (five) 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.

Deliverable 1.3.4: Project Briefing: A presentation-style document shall be developed that provides a concise executive summary of the project's business value definition and justification and will serve as the deliverable for the checkpoint at the end of the phase and updated as knowledge is acquired to insure the content is current .

The contractor shall demonstrate a thorough and comprehensive understanding of the business case, business value definition and justification to include a comprehensive and detailed problem statement and hypothesis, business drivers, project goals, use case scenarios, process description(s), workflow description of the current and future state, a description of what is working well and opportunities for improvement, and current strategies to measure success and Key Performance Indicators(KPI's) as these items are learned, developed and understood.

The briefing shall contain stakeholder information, site visit planning and reporting of site visit execution information created in sub-phase 1.2 (Plan Engagement), accomplishments, schedule, and other information relevant to the project engagement. Briefings shall include an Executive Summary that is no longer than (five) 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress

and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.

Checkpoint: For the Business Value Definition and Justification phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-Phase: 1.4 Define Benefits

The contractor shall perform the tasks to define the benefits for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Define Benefits phase is to demonstrate all of benefit(s), measurement grouping(s), metric(s) required to successfully and completely measure attainment of all intended engagement benefits and project goals.

The contractor shall develop the Long List of Applicable Benefits document to demonstrate the comprehensive list of applicable benefit(s), measurement grouping(s), metric(s) that may be realized as a result of the project. The purpose of the document is to demonstrate identification all of the applicable benefit(s), measurement grouping(s), and metric(s) associated with the project, regardless of priority or measurement feasibility from a measurement plan perspective.

The contractor shall validate the final benefit(s), measurement grouping(s), metric(s) that will be included in the Short List of Benefits (SLOB) based on the Performance Metric Rating (PMR). The contractor shall use the PMR to evaluate each of the benefits and performance measures and metrics within the Long List of Applicable Benefits in order to determine which are the most qualified benefit(s), measurement grouping(s) and metric(s) to include that will proving the value of the investment and be evaluated as part of the Product Effectiveness Measurement Services (PEMS) assessment. The Short List of Benefits shall demonstrate inclusion of benefit(s), measurement grouping(s), metric(s) that have a confirmed applicability, data availability, data integrity, data measurability, data collection effort and alignment to the business case. The short list of Benefits shall demonstrate all of the benefit(s), measurement grouping(s), metric(s) required to successfully and completely measure attainment of all intended benefits and project goals. The short list of Benefits shall include a rationale for inclusion of each benefit(s), measurement grouping(s), metric(s) on the list with supporting information to highlight the importance of why it is on the list and includes the linkages to the business value and the project goals

The Define Benefits Phase shall require critical thinking to demonstrate a full understanding of project related policies, processes, business rules, business control points and potential points of failure and the logic and rationale for inclusion of and the benefit(s), measurement grouping(s), metric(s) related to them including those that demonstrates variations between the as is and to be workflow and points of impact from a business role and business value of healthcare perspective to validate key points of measurement.

Deliverable 1.4.1: Project Plan Update: The contractor shall update the baseline project plan created in *Sub-Phase 1.2-Plan Engagement-Engagement Project Plan* to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall

include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.4.2: Long List of Applicable Benefits: The contractor shall develop the Long List of Applicable Benefits document to demonstrate the comprehensive list of applicable benefit(s), measurement grouping(s), metric(s) that may be realized as a result of the project.

The Long List of Applicable Benefits is developed based on all knowledge acquired from interviews, research, validated workflow(s), project hypothesis, simulations, project success factors, KPI's, business roles, potential benefit(s), measurement grouping(s), metric(s), knowledge of data availability, site visit input and all previous engagement information.

The Long List of Applicable Benefits shall demonstrate an understanding of the business case, policies, processes, business control points and potential points of failure related to the benefit(s), measurement grouping(s), metric(s), operational definition and applicability to the business case and business problem being solved. The contractor shall include all elements of a measurement plan to include an abridged rationale for each benefit(s), measurement grouping(s), metric(s) on the Long List of Applicable Benefits, importance to stakeholders, desired outcome, data source (if known), measurement grouping linkages to the business case and timeframe for data collection. The contractor shall insure that there is ample information in the Long List of Applicable benefits to perform a Performance Metric Rating (PMR) which follow in the next sub-phase.

The contractor shall include any facts (data) that can be qualitatively and quantitatively measured. Foundational, functional and adoption benefits shall be identified and included that must be achieved before additional operational and strategic benefits are fully realized. The purpose of the document is to demonstrate identification all of the applicable benefit(s), measurement grouping(s), and metric(s) associated with the project, regardless of priority or measurement feasibility from a measurement plan perspective.

Deliverable 1.4.3: Performance Metric Rating and Short List of Benefits: The contractor shall validate the final benefit(s), measurement grouping(s), metric(s) that will be included in the Short List of Benefits based on the Performance Metric Rating (PMR). The contractor shall use the PMR to evaluate each of the benefits and performance measures and metrics within the Long List of Applicable Benefits in order to determine which are the most qualified benefit(s), measurement grouping(s) and metric(s) to include that will proving the value of the investment and be evaluated as part of the Product Effectiveness Measurement Services (PEMS) assessment.

The contractor shall derive an overall Performance Measure Rating (PMR) for each performance measures by evaluating them based on (1) Benefit Applicability (2) Data availability (3) Data integrity (4) Data Measurability (qualitative or quantitative) (5) Data Collection Effort required based on their own knowledge and input from other domains, Product Effectiveness Measurement Services (PEMS) Program Manager, Product Effectiveness Director and SME's to determine which performance measures from the Long List of Applicable Benefit will be

ultimately be evaluated as part of the assessment. The contractor shall refer to the Product Effectiveness Measurement Services (PEMS) Process and Procedures document PRM process to successfully complete this deliverable. The contractor shall understand the PMR process, operational definition of the metric being rated and expected measurement output from the PMR. PMR output will be reviewed and approved with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to finalization of the Short List of Benefits.

The Short List of Benefits shall include the results of the PMR. The Short List of Benefits shall demonstrate inclusion of benefit(s), measurement grouping(s), metric(s) that have a confirmed applicability, data availability, data integrity, data measurability, data collection effort and alignment to the business case. The short list of Benefits shall demonstrate all of benefit(s), measurement grouping(s), metric(s) required to successfully and completely measure attainment of all intended benefits and project goals. The short list of Benefits shall include a rationale for inclusion of each benefit(s), measurement grouping(s), metric(s) on the list with supporting information to highlight the importance of why it is on the list and includes the linkages to the business value and the project goals

Deliverable 1.4.4: Project Briefing: The contractor shall develop a comprehensive Define Benefits Project Briefing that demonstrates a complete, well defined and comprehensive list of quantitative and qualitative measures and metrics and related data sources and updated as knowledge is acquired to insure the content is current. The purpose of the Define Benefits Project Briefing is to demonstrate a full understanding of project related policies, processes, business rules, business control points and potential points of failure and the benefit(s), measurement grouping(s), metric(s) related to them.

The contractor shall demonstrate the logic and rationale for inclusion of all benefit(s), measurement grouping(s) and metric(s) including those that demonstrates variations between the as is and to be workflow and points of impact from a business role perspective to validate key points of measurement. Project Briefings shall include an Executive Summary that is no longer than (five) 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front (BLUF) and sufficient analysis to be deemed credible.

Checkpoint: For the define benefits phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-phase: 1.5 Measurement Plan

The contractor shall perform the tasks to create the measurement plan for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Measurement Plan phase is to describe and demonstrate all quantitative and qualitative measure(s), measurement grouping(s), and metrics to include data definition(s), a detailed and comprehensive rationale, sample size, data collection timeframe, data collection plan, known

benchmarks, desired outcomes and validated data sources. The Measurement Plan shall include the following:

- **Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources:** All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the comprehensive measurement plan.
- **Foundational Benefits:** Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated in detail.
- **Hypothesis:** The Measurement Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect.
- **Dependencies and Correlations:** benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis.
- **Simulated Examples:** Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case.

The Measurement Plan Phase shall require critical thinking to describe and demonstrate all applicable quantitative and qualitative measure(s), measurement grouping(s), and metrics, foundational benefits, hypothesis', dependencies and correlations and simulated examples in sufficient detail to provide a solid measurement framework to demonstrate attainment of project goals, expected benefits and business value of healthcare objectives.

Deliverable 1.5.1: Project Plan Update: The contractor shall update the baseline project plan created in *Sub-Phase 1.2-Plan Engagement-Engagement Project Plan* to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.5.2: Measurement Plan: All quantitative and qualitative measure(s), measurement grouping(s), and metrics shall be described and demonstrate data definition(s), a detailed and comprehensive rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Measurement Plan shall include the following:

- Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources: All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the comprehensive measurement plan.
- Foundational Benefits: Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated in detail.
- Hypothesis: The Measurement Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect.
- Dependencies and Correlations: benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis.
- Simulated Examples: Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case.

Checkpoint: For the measurement plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-Phase: 1.6 Data Collection and Analysis

The objective of the Data Collection and Analysis phase is to demonstrate a complete and comprehensive review of how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include the following:

- Foundational Benefits: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.
- Hypothesis: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary.

- **Dependencies and Correlations:** The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.
- **Simulated Examples:** The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary.

The Data Collection and Analysis Phase shall require critical thinking to demonstrate a complete and comprehensive understanding and analysis of data findings to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals, expected benefits and business value of healthcare objectives were met.

Deliverable 1.6.1: Project Plan Update: The contractor shall update the baseline project plan created in *Sub-Phase 1.2-Plan Engagement-Engagement Project Plan* to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.6.2: Project Analysis and Preliminary Findings Report: The contractor shall populate all metrics described in the Measurement Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate a complete and comprehensive review of how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:

- **Foundational Benefits:** Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.
- **Hypothesis:** The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary.

- Dependencies and Correlations: The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.
- Simulated Examples: The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary.

The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare the Project Analysis and Preliminary Findings Report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.

Checkpoint: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-Phase: 1.7 Reporting

The contractor shall perform the tasks to create the final report for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Reporting phase is to create a final engagement report that serves as an executive summary which includes critical findings to demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or “no go”.

The report shall also include and demonstrate any salient points that were identified in the Measurement Plan and Data Collection and Analysis Phase. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall deliver a report ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized.

The Reporting Phase shall require critical thinking to create a final engagement report that reflects critical findings to demonstrate the business value of the engagement investment and

provide data based evidence and conclusions to assist executive leaders in making data based decisions related to the investment.

Deliverable 1.7.1: Project Plan Update: The contractor shall update the baseline project plan created in *Sub-Phase 1.2-Plan Engagement-Engagement Project Plan* to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.7.2: Report of Findings: The contractor shall deliver a Report of Findings ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The Report of Findings shall also include and demonstrate any salient points that were identified in the Measurement Plan and Data Collection and Analysis Phase. When the Report of Findings is being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the Report of Findings.

Report of Findings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the Executive Summary, the Report of Findings shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the summary of findings, the Report of Findings body (target fifteen (15) pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the report. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.

A separate one (1) page stand-alone document known as a Quick Facts shall accompany the Report of Findings and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.

Checkpoint: For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.

Deliverable 1.7.3: Project Briefing: The contractor shall develop a comprehensive Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Project Briefing is serve as an executive summary which includes critical findings to demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or ‘no go. The Project Briefing shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.

Sub-Phase: 1.8 Post Implementation-Plan Engagement

Product Effectiveness will provide scoping direction and goals at the start of the phase. The contractor shall adhere to scoping direction and goals provided by Product Effectiveness. The contractor shall perform the prerequisite activities required to begin Product Effectiveness Measurement Services (PEMS) Post Implementation planning. The objective of the Post Implementation Plan Engagement phase is to complete the tasks necessary to successfully and completely plan and initiate a Product Effectiveness Measurement Services Post Implementation engagement focused on the business value of healthcare. The contractor shall create a detailed mission focused project plan in a timely manner to guide the entire engagement’s direction. This project plan will serve as the baseline for future project plan updates. The contractor shall create a project charter in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment.

A presentation-style briefing document shall be developed that provides an executive summary of the project and contain the information needed to initiate and guide discussions with SME’s and the User Working Group (UWG). The User Working Group is comprised of a representative sampling of subject matter experts (front line staff, supervisors, program office representatives, executive leaders and various stakeholders) who have a vested interest in the engagement subject

matter. The briefing shall drive to a complete and comprehensive plan for site visit planning and execution and include an initial product workflow description(s) that compares the as is and to be state from the business role perspective in preparation for validation at future site visits.

The contractor shall perform the tasks to understand the business value of the Product Effectiveness Measurement Services (PEMS) engagement with the objective of understanding and describing the business case and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case and expected benefits can be enhanced to assist with resolution of the problem.

The contractor shall demonstrate a thorough and comprehensive understanding of the business case to include a complete and thorough understanding of the problem statement and hypothesis, business drivers, project goals, use case scenarios, process description(s), workflow description of the current and future state, a description of what is working well and opportunities for improvement, project related policies, processes, business rules, business control points and potential points of failure and current strategies to measure success, expected project benefits and Key Performance Indicators (KPI's). This understanding shall be validated by the site visits(s) that occur in this phase. The Post Implementation Plan Engagement Phase shall require critical thinking to support Product Effectiveness in acquiring required information for successfully planning and initiating the engagement and successfully understanding the business case and healthcare business value of the engagement.

Deliverable 1.8.1: Project Plan: The contractor shall create a detailed mission focused baseline project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline. The baseline 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 entire engagement to successful completion. The project plan shall include an initial successful checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.8.2: Charter and/or Addendum: The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have

authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.

Deliverable 1.8.3: Steering Committee and User Working Group Presentations: Steering Committee and User Working Group Presentations shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.

Deliverable 1.8.4: Business Value Report: The contractor shall develop the Business Value report, in MS WORD format, with the purpose of developing and demonstrating a complete and thorough understanding of the problem statement, project related policies, processes, business rules, business control points and potential points of failure. This understanding shall be validated by the site visits(s) that occur in this phase. All information learned and validated at the site visit(s), shall be included in the Business Value report in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress.

The contractor shall also demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met. Expected project benefits shall be clearly articulated along with measurement approaches, success factors and Key Performance Indicators (KPI's). The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall develop "what if" scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced.

The Business Value report shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.

Checkpoint: For the measurement plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Deliverable 1.8.5: Project Briefing: A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare. The project briefing shall include all information needed to prepare for a site visit and shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. The project briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow description of the current and future state created with input from the steering committee and user working group, a description of what is working well and opportunities for improvement, project goals, current strategies to measure success, interview questions and site visit guidelines. The project briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). The contractor shall map site visits to an understanding of the business case and problem statements.

Project briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible. The project briefing shall be reviewed with the BR Program Manager weekly updated weekly and will serve as the deliverable for the checkpoint at the end of the phase.

Sub-Phase: 1.9 Post Implementation-Measurement Plan

The contractor shall perform the tasks to create the post implementation measurement plan for the Product Effectiveness Measurement Services (PEMS) engagement. The contractor shall update the Baseline/Initial Engagement Measurement Plan to reflect any added, deleted or updated benefit(s), measurement grouping(s) or metrics needed to successfully measure the business value impact of the change from the baseline/initial measurement in the post implementation measurement. The contractor shall verify assumptions, refine evaluation strategies, validate evaluation plans, and/or pilot questionnaire content. The objective of the Post Implementation Measurement Plan phase is to describe and demonstrate all quantitative and qualitative measure(s), measurement grouping(s), and metrics to include data definition(s), a detailed and comprehensive rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Post Implementation Measurement Plan shall include the following:

- **Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources:** All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the comprehensive measurement plan.
- **Foundational Benefits:** Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated in detail.

- Hypothesis: The Measurement Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect.
- Dependencies and Correlations: benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis.
- Simulated Examples: Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case.

The Post Implementation Measurement Plan Phase shall require critical thinking to describe and demonstrate all applicable quantitative and qualitative measure(s), measurement grouping(s), and metrics, foundational benefits, hypothesis', dependencies and correlations and simulated examples in sufficient detail to provide a solid measurement framework to demonstrate attainment of project goals, expected benefits and business value of healthcare objectives.

Deliverable 1.9.1: Project Plan Update: The contractor shall update the baseline project plan created in *Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan* to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and PE Director weekly.

Deliverable 1.9.2: Measurement Plan Update: The contractor shall update the Baseline/Initial Engagement Measurement Plan to reflect any added, deleted or updated benefit(s), measurement grouping(s) or metrics needed to successfully measure the business value impact of the change from the baseline/initial measurement in the post implementation measurement. The contractor shall verify assumptions, refine evaluation strategies, validate evaluation plans, and/or pilot questionnaire content. All quantitative and qualitative measure(s), measurement grouping(s), and metrics shall be described and demonstrate data definition(s), a detailed and comprehensive rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Measurement Plan shall include the following:

- **Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources:** All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the comprehensive measurement plan.
- **Foundational Benefits:** Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated in detail.

- Hypothesis: The Measurement Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect.
- Dependencies and Correlations: benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis.
- Simulated Examples: Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case.

Checkpoint: For the measurement plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-Phase: 10.1 Post Implementation-Data Collection and Analysis

The contractor shall perform the tasks to collect and analyze all data for the post implementation Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Post Implementation Data Collection and Analysis phase is to demonstrate a complete and comprehensive review of how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:

- **Foundational Benefits**: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.
- **Hypothesis**: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary.
- **Dependencies and Correlations**: The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.

- **Simulated Examples:** The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary.

The Data Collection and Analysis Phase shall require critical thinking to demonstrate a complete and comprehensive understanding and analysis of data findings to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals, expected benefits and business value of healthcare objectives were met.

Deliverable 1.10.1: Project Plan Update: The contractor shall update the baseline project plan created in *Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan* to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.10.2: Preliminary Findings Report: The contractor shall populate all metrics described in the Measurement Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate a complete and comprehensive review of how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:

- **Foundational Benefits:** Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.
- **Hypothesis:** The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary.
- **Dependencies and Correlations:** The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with

government team members as well as with contract support from other firms supporting Product Effectiveness.

- **Simulated Examples:** The analysis shall include input of actual data in the simulation models created in the Post Implementation Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary.

The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare this report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.

Checkpoint: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-Phase: 1.11 Post Implementation-Reporting

The contractor shall perform the tasks to create the final report for the post implementation Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Post Implementation Reporting phase is to create a final engagement report that serves as an executive summary which includes critical findings to demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or ‘no go.

The report shall also include and demonstrate any salient points that were identified in the Post Implementation Measurement Plan and Post Implementation Data Collection and Analysis Phase. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall deliver a report ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized.

The Post Implementation Reporting Phase shall require critical thinking to create a final engagement report that reflects critical findings to demonstrate the business value of the engagement investment and provide data based evidence and conclusions to assist executive leaders in making data based decisions related to the investment.

Deliverable 1.11.1: Project Plan Update: The contractor shall update the baseline project plan created in *Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan* to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure

(WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.11.2: Report of Findings: The contractor shall deliver a Report of Findings ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The Report of Findings shall also include and demonstrate any salient points that were identified in the Post Implementation Measurement Plan and Data Collection and Analysis Phase.

When Reports of Findings are being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the report

Report of Findings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the Executive Summary, the Report of Findings shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the summary of findings, the report body (target fifteen (15) pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the Report of Findings. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.

A separate one (1) page stand-alone document known as a Quick Facts shall accompany the Report of Findings and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.

Deliverable 1.11.3: -Project Briefing: The contractor shall develop a Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Project Briefing is to serve as an executive summary which includes critical findings to demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or ‘no go.

The Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.

Checkpoint: For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.

Sub-Phase 1.12 Lessons Learned

The contractor shall perform the tasks to gather and record the lessons learned for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Lessons learned phase is to create a document that describes the comprehensive lessons learned from the Product Effectiveness Measurement Services (PEMS) engagement project, addressing each task and subtask of the project. This report will include retrospective accomplishments to demonstrate if goals for the evaluation were accomplished and recommendations for any improvements needed for future engagement successes.

The Lessons Learned Phase shall require critical thinking to create a Lessons Learned report that reflects critical findings to demonstrate comprehensive lessons learned from the Product Effectiveness Measurement Services (PEMS) engagement and provide valuable feedback to Product Effectiveness, current and future stakeholders and senior program leaders, top level agency leadership and members of Congress

Deliverable 1.12.1: Project Plan Update: The contractor shall update the baseline project plan created in *Sub-Phase 1.2-Plan Engagement-Engagement Project Plan* or *Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan* as applicable to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The

project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 1.12.2: Report of Findings: The contractor shall create a document that describes the comprehensive lessons learned from the Product Effectiveness Measurement Services (PEMS) engagement project, addressing each task and subtask of the project. Lessons Learned shall be gathered at each phase of an engagement as it progresses and be shared with the project stakeholders. This report will include retrospective accomplishments to demonstrate if goals for the evaluation were accomplished and recommendations for any improvements needed for future engagement successes. Lessons Learned shall include findings written in a concise format intended for internal use by Product Effectiveness, current and future engagement stakeholders and senior program leaders, top level agency leadership and members of Congress. All findings, lessons, naming conventions, and other data developed through all phases shall comply with conventions established to support use within the Product Effectiveness Knowledgebase.

Lessons Learned shall include a self-assessment of the customer engagement, based on planned and realized value of the engagement to the Product Effectiveness customer. This deliverable shall demonstrate the objective and subjective value of the Product Effectiveness Measurement Services (PEMS) 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 Product Effectiveness Program.

Checkpoint: For the lessons learned phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.

Phase 2: Evaluation (Medium Rigor-Sub-Phase 2.1-2.8): *The purpose of an evaluation is to provide a rapid product effectiveness measurement services assessment. It will include an evaluation plan that identifies benefits, measurements and metrics. The plan is validated with subject matter experts and project stakeholders which will include descriptions, rationale, data sources, etc. of metrics. This is presented in an abbreviated format vs. a comprehensive/rigorous measurement plan. An example would be a targeted evaluation that may be focused on a pilot and/or first iteration of a change at site(s), VISN(s), and/or program office(s).*

Sub-Phase: 2.1 Evaluation-Engagement Plan

Product Effectiveness will provide scoping direction and Evaluation goals at the start of the phase. The contractor shall adhere to scoping direction and Evaluation goals provided by Product Effectiveness. The contractor shall perform the prerequisite activities required to begin Product Effectiveness Measurement Services (PEMS) engagement planning focused on the business value of healthcare.

The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement,

planned deliverables and development of a project baseline and includes weekly updates over the lifecycle of the project (6-8 weeks) as defined by Product Effectiveness.

This sub-phase requires contractor interaction with potential Product Effectiveness 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 evaluation plans, and/or pilot questionnaire content. The contractor shall facilitate, schedule, and document all meetings with program staff and potential customers.

A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare and include all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project.

The briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow descriptions, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success.

The briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG) and brief stakeholder and executive leaders on project progress. The briefing shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. All information learned and validated at the site visit(s) shall be included in the report in a concise format. The contractor shall map site visits to an understanding of the business case and problem statements. The Evaluation-Engagement Plan Phase shall require critical thinking to support Product Effectiveness in acquiring required information for successfully planning and initiating the evaluation and successfully understanding the business case and healthcare business value of the evaluation.

Deliverable 2.1.1: Project Plan: The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the lifecycle of the project (6-8 weeks) as defined by Product Effectiveness. The project baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 2.1.2: Charter and/or Addendum: The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a PEMS assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.

Deliverable 2.1.3: Steering Committee and User Working Group Presentations: Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare with the goal of including all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting presentations shall also be used to discuss project status, validate information and understandings, validate evaluation plans, and/or pilot questionnaire content, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.

Deliverable 2.1.4: Project Briefing: A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare and include all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project.

The project briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow descriptions, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Workflows will be created from a business value perspective to include points of process variation (impacts), potential points of failure, applicable use cases and various applicable scenarios. Potential points of workflow failure will be identified. The contractor shall

gather workflow information from existing work flows, user working groups, SME's, workflows created by other domains such as Functional Review (FR) and other applicable sources to inform the creation of the workflow. The contractor shall utilize the final workflow to validate the messaging and context for how measures relate to one another.

The project briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). The project briefing shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. All information learned and validated at the site visit(s) shall be included in the report in a concise format. The contractor shall map site visits to an understanding of the business case and problem statements.

Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible. The briefing shall be reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager weekly updated weekly and will serve as the deliverable for the checkpoint at the end of the phase.

Sub-Phase: 2.2 Evaluation-Evaluation Plan

The contractor shall perform the tasks to create the evaluation plan for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Evaluation-Evaluation Plan phase is to describe and demonstrate All project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project shall be described and demonstrate data definition(s), an abridged rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Evaluation-Evaluation Plan shall include the following:

- **Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources:** All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the evaluation plan if deemed critical to rapidly (6-8 weeks) measure project success.
- **Foundational Benefits:** Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated.
- **Hypothesis:** The Evaluation Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect.
- **Dependencies and Correlations:** benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis.

- **Simulated Examples:** Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case.

The Evaluation-Evaluation Plan Phase shall require critical thinking to describe and demonstrate all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics, foundational benefits, hypothesis', dependencies and correlations and simulated examples in sufficient detail to rapidly (6-8 weeks) evaluate success of the project to demonstrate attainment of project goals, expected benefits and business value of healthcare objectives.

Deliverable 2.2.1: Evaluation Plan: All project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project shall be described and demonstrate data definition(s), an abridged rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Evaluation Plan shall include the following:

- **Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources:** All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the evaluation plan if deemed critical to rapidly (6-8 weeks) measure project success.
- **Foundational Benefits:** Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated.
- **Hypothesis:** The Evaluation Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect.
- **Dependencies and Correlations:** benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis.
- **Simulated Examples:** Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case.

Checkpoint: For the evaluation plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-Phase: 2.3 Evaluation-Data Collection and Analysis

The contractor shall perform the tasks to collect and analyze all data for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Evaluation-Data Collection and Analysis phase is to populate all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) described in the Evaluation Plan with all values and results from all domains and sources prior to the analysis to evaluate the success of the project. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:

- **Foundational Benefits:** Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.
- **Hypothesis:** The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary.
- **Dependencies and Correlations:** The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.
- **Simulated Examples:** The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary.

The Data Collection and Analysis Phase shall require critical thinking to demonstrate a complete and comprehensive understanding and analysis of data findings to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals, expected benefits and business value of healthcare objectives were met.

Deliverable 2.3.1: Preliminary Findings Report: The contractor shall populate all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project and described in the Evaluation Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall

demonstrate how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:

- Foundational Benefits: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.
- Hypothesis: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary.
- Dependencies and Correlations: The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.
- Simulated Examples: The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary.

The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare this Preliminary Findings Report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.

Checkpoint: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-Phase: 2.4 Evaluation-Final Report

The contractor shall perform the tasks to create a concise Evaluation Final Report for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Evaluation-Final Report phase is to create a concise and rapid (6-8 weeks) final engagement report that serves as an executive summary which includes critical findings to demonstrate the business

value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or ‘no go.

The report shall also include and demonstrate any salient points that were identified in the Evaluation -Evaluation Plan and Evaluation-Data Collection and Analysis Phase. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall deliver a concise and rapid (6-8 weeks) report ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized.

The Evaluation-Final Report Phase shall require critical thinking to create a final engagement report that reflects concise and rapid (6-8 weeks) critical findings to demonstrate the business value of the engagement investment and provide data based evidence and conclusions to assist executive leaders in making data based decisions related to the investment.

Deliverable 2.4.1: Final Report: The contractor shall deliver a concise and rapid (6-8 weeks) report to demonstrate critical findings in a format ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The report shall also include and demonstrate any salient points that were identified in the Evaluation Plan and Data Collection and Analysis Phase. When reports are being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the report.

Final Reports shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the Executive Summary, the Final Report shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the summary of findings, the report body (target 15 pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the report. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.

A separate one (1) page stand-alone document known as a Quick Facts shall accompany the report and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.

Checkpoint: For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.

Deliverable 2.4.2: Project Briefing:

The contractor shall develop a concise Evaluation Final Report Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Evaluation Final Report Project Briefing is to serve as an executive summary which includes critical findings to concisely and rapidly (6-8 weeks) demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or “no go”.

Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.

Sub-Phase: 2.5 Evaluation-Post Implementation Engagement Plan

Product Effectiveness will provide scoping direction and Evaluation goals at the start of the phase. The contractor shall adhere to scoping direction and Evaluation goals provided by Product Effectiveness. The contractor shall perform the prerequisite activities required to begin Product Effectiveness Measurement Services (PEMS) engagement planning focused on the business value of healthcare.

The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the lifecycle of the project (6-8 weeks) as defined by Product Effectiveness.

This sub-phase requires contractor interaction with potential Product Effectiveness 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 evaluation plans, and/or pilot questionnaire content. The contractor shall facilitate, schedule, and document all meetings with program staff and potential customers

A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare and include all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project.

The briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow description of the current and future state, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success.

The briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG) and brief stakeholder and executive leaders on project progress. The briefing shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. All information learned and validated at the site visit(s) shall be included in the report in a concise format. The contractor shall map site visits to an understanding of the business case and problem statements. The Evaluation-Engagement Plan Phase shall require critical thinking to support Product Effectiveness in acquiring required information for successfully planning and initiating the evaluation and successfully understanding the business case and healthcare business value of the evaluation.

Deliverable 2.5.1: Project Plan: The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the lifecycle of the project (6-8 weeks) as defined by Product Effectiveness. The project baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 2.5.2: Charter and/or Addendum: The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.

Deliverable 2.5.3: Steering Committee and User Working Group Presentations: Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare with the goal of updating the existing evaluation plan including all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. The contractor shall facilitate, schedule, and document all meetings with program staff and potential customers. Meeting presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.

Deliverable 2.5.4: Project Briefing: A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare and include all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project.

The project briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow descriptions, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Workflows will be created from a business value perspective to include points

of process variation (impacts), potential points of failure, applicable use cases and various applicable scenarios. Potential points of workflow failure will be identified. The contractor shall gather workflow information from existing work flows, user working groups, SME's, workflows created by other domains such as Functional Review (FR) and other applicable sources to inform the creation of the workflow. The contractor shall utilize the final workflow to validate the messaging and context for how measures relate to one another.

The project briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). The project briefing shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. All information learned and validated at the site visit(s) shall be included in the report in a concise format. The contractor shall map site visits to an understanding of the business case and problem statements.

Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible. The briefing shall be reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager weekly updated weekly and will serve as the deliverable for the checkpoint at the end of the phase.

Sub-Phase: 2.6 Evaluation-Post Implementation Evaluation Plan Update

The contractor shall perform the tasks to create the Post Implementation Evaluation Plan for the Product Effectiveness Measurement Services (PEMS) engagement. The contractor shall update Post Implementation Evaluation Plan to reflect any added, deleted or updated benefit(s), measurement grouping(s) or metrics needed to successfully measure the business value impact of the change from the baseline/initial measurement in the post implementation measurement. The objective of the Post Implementation Evaluation Plan is to describe and demonstrate all quantitative and qualitative measure(s), measurement grouping(s), and metrics to include data definition(s), a detailed and comprehensive rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Post Implementation Evaluation Plan shall include the following:

- Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources: All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the evaluation plan if deemed critical to rapidly (6-8 weeks) measure project success.
- Foundational Benefits: Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated.

- **Hypothesis:** The Evaluation Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect.
- **Dependencies and Correlations:** benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis.
- **Simulated Examples:** Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case.

The Post Implementation Evaluation Plan shall require critical thinking to describe and demonstrate all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics, foundational benefits, hypothesis', dependencies and correlations and simulated examples in sufficient detail to rapidly (6-8 weeks) evaluate success of the project to demonstrate attainment of project goals, expected benefits and business value of healthcare objectives.

Deliverable 2.6.1: Evaluation Plan: All project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project shall be described and demonstrate data definition(s), an abridged rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Evaluation Plan shall include the following:

- **Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources:** All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the evaluation plan if deemed critical to rapidly (6-8 weeks) measure project success.
- **Foundational Benefits:** Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated.
- **Hypothesis:** The Evaluation Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect.
- **Dependencies and Correlations:** benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis.

- **Simulated Examples:** Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case.

Checkpoint: For the evaluation plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-Phase: 2.7 Evaluation-Post Implementation-Data Collection and Analysis

The contractor shall perform the tasks to collect and analyze all data for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Post Implementation-Data Collection and Analysis phase is to populate all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) populate the Post Implementation- Evaluation Plan with all values and results from all domains and sources prior to the analysis to evaluate the success of the project . Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:

- **Foundational Benefits:** Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.
- **Hypothesis:** The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary.
- **Dependencies and Correlations:** The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.
- **Simulated Examples:** The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary.

The Post Implementation-Data Collection and Analysis Phase shall require critical thinking to demonstrate a complete and comprehensive understanding and analysis of data findings to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals, expected benefits and business value of healthcare objectives were met.

Deliverable 2.7.1: Preliminary Findings Report: The contractor shall populate all project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project and described in the Post Implementation Evaluation Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:

- **Foundational Benefits:** Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.
- **Hypothesis:** The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary.
- **Dependencies and Correlations:** The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.
- **Simulated Examples:** The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary.

The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare this Preliminary Findings Report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.

Checkpoint: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.

Sub-Phase: 2.8 Evaluation-Post Implementation-Final Report

The contractor shall perform the tasks to create a concise Post Implementation-Evaluation Final Report for the Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Evaluation-Final Report phase is to create a concise and rapid (6-8 weeks) final engagement report that serves as an executive summary which includes critical findings to demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or ‘no go.

The report shall also include and demonstrate any salient points that were identified in the Post Implementation-Evaluation Plan and Post Implementation-Data Collection and Analysis Phase. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall deliver a concise and rapid (6-8 weeks) report ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized.

The Post Implementation-Final Report Phase shall require critical thinking to create a final engagement report that reflects concise and rapid (6-8 weeks) critical findings to demonstrate the business value of the engagement investment and provide data based evidence and conclusions to assist executive leaders in making data based decisions related to the investment.

Deliverable 2.8.1: Final Report: The contractor shall deliver a concise and rapid (6-8 weeks) report to demonstrate critical findings in a format ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The report shall also include and demonstrate any salient points that were identified in the Post Implementation-Evaluation Plan and Post Implementation-Data Collection and Analysis Phase. When reports are being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the report.

Post Implementation-Final Reports shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up

front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the Executive Summary, the Final Report shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the summary of findings, the report body (target 15 pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the report. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)

The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the BRMS methodology, a benefit by benefit summary of results and a summary of findings and recommendations.

A separate one (1) page stand-alone document known as a Quick Facts shall accompany the report and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.

Deliverable 2.8.2: Project Briefing:

The contractor shall develop a concise Post Implementation- Final Report Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Evaluation Final Report Project Briefing is to serve as an executive summary which includes critical findings to concisely and rapidly (6-8 weeks) demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or ‘no go.

Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.

Checkpoint: For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.

Phase 3: Assessment (Low rigor-Sub-Phase 3.1): *The purpose of an Assessment is to determine effectiveness of change. It will not require a comprehensive measurement plan but instead will require a basic, structured assessment plan that defines a measurement approach that may serve as a pre-cursor to a comprehensive measurement plan. An example would be an engagement with a quick turnaround to validate benefits and/or viability of a product. The assessment could be a Post Implementation Review, Root Cause Analysis, Lessons Learned retrospect, etc.*

Sub-Phase: 3.1 Assessment

Product Effectiveness will provide scoping direction and Assessment goals at the start of the phase. The contractor shall adhere to scoping direction and Assessment goals provided by Product Effectiveness. The contractor shall perform the tasks to understand the Assessment Product Effectiveness Measurement Services (PEMS) engagement. The objective of the Assessment phase is to rapidly (2-4 weeks) understand and describe the business case and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case and expected benefits can be enhanced to assist with resolution of the problem.

The contractor shall demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met. Expected project benefits shall be clearly articulated in a basic, structured assessment plan that defines a measurement approach that may serve as a pre-cursor to a comprehensive measurement plan. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.

The contractor shall develop “what if” scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced. The Assessment shall require critical thinking to support Product Effectiveness in acquiring required information for successfully understanding the business case and healthcare business value of the engagement.

Deliverable 3.1.1: -Project Plan: The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the brief (2-4 weeks) lifecycle of the project as defined by Product Effectiveness.

The project plan baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.

Deliverable 3.1.2: Business Value Assessment Report: The contractor shall develop the Assessment-Business Value Assessment Report, in MS WORD format, with the purpose of developing and demonstrating an understanding of the effectiveness of the change being assessed. The Business Value Assessment Report shall include a basic, structured assessment plan that defines a measurement approach that may serve as a pre-cursor to a comprehensive measurement plan.

A complete and thorough understanding of the problem statement, project related policies, processes, business rules, business control points and potential points of failure shall be demonstrated in the Business Value Assessment Report in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress. The contractor shall also demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met. Expected project benefits shall be clearly articulated in a basic, structured assessment plan that defines a measurement approach that may serve as a pre-cursor to a comprehensive measurement plan. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall develop “what if” scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced.

The Business Value Assessment Report shall include an Executive Summary that is no longer than five (5) pages, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.

Program Management: Product Effectiveness Measurement Services Contract Program Management encompasses program and project management activities to include weekly status reports, monthly accomplishment reports, Post Engagement Business Value Reports and additional Steering Committee and User Working Group Meetings needed throughout the entire lifecycle of the contract. Program Management Products shall be uploaded to the PE Program SharePoint site.

Contract Program Management: Product Effectiveness Measurement Services Contract Program Management encompasses program and project management activities to include weekly status reports and monthly accomplishment reports throughout the entire lifecycle of the contract. Program Management Products shall be uploaded to the PE Program SharePoint site.

- ***Weekly Status Report:*** This deliverable is a weekly report of status of milestones, project plan timeline compliance, activities and accomplishments, and shall include actions, issues, and risks. This report shall serve as the agenda for the weekly Product Effectiveness Measurement Services status meeting. This report shall also contain a table of the awarded Task Phases and Deliverables listing their status (assigned/unassigned) as well as the customer engagement assigned. This report shall also contain Benefits Realization Program Pipeline strategy and shall include recommendations for provision of PE services to current or potential engagement customers. Deliverable applies to all engagements in the contract.
- ***Monthly Accomplishments Report:*** This deliverable provides updates to the report of accomplishments for the engagement. Engagement accomplishments shall be reported as “track changes” updates to the PE Monthly Accomplishments 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 PE Monthly Accomplishments Report. Deliverable applies to all engagements in the contract.

Post Engagement Business Value Report: Product Effectiveness Measurement Services (PEMS) Post Engagement Business Value Report (PEBVR) includes a post-engagement review of the impact and business value provided by Product Effectiveness (PE) to the enterprise (e.g., to what extent was Product Effectiveness (PE) able to achieve its goals and objectives for the evaluation?). This report will include a detailed and comprehensive account of engagement accomplishments, including how findings align with VA, VHA and Product Effectiveness (PE) strategic goals and objectives and the value of the findings in supporting strategic decisions. The accomplishments will also document the extent of the Product Effectiveness (PE) evaluation (e.g., number of site visits, staff interviewed, data analyzed, key leadership briefed), specific action plans developed as a result of Product Effectiveness (PE)’s involvement, and any positive feedback provided by key stakeholders. (Please note that content requirements may change periodically as strategic direction and performance requirements change for VA, VHA and Product Effectiveness (PE). The contractor shall check with the Product Effectiveness Measurement Services (PEMS) Domain lead for any content requirement changes prior to starting the report).

Steering Committee and User Working Group Meetings (Presentations): This deliverable provides for additional Steering Committee, User Working Group and Subject matter Expert meetings when needed as determined by Product Effectiveness (PE). The effort involved related to this deliverable would be for five (5) Steering Committee and User Working Group Meetings and related presentations, meeting agenda’s and minutes. Steering Committee and User Working Group Presentations shall contain the information needed to initiate and guide discussions with SME’s and the User Working Group (UWG). Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting

presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.

Pre-meeting activities shall be complete, accurate and thorough to include obtainment of required research and knowledge (content). Meeting logistics and content shall be completed well before the meeting occurs and approved by the government lead. Meeting facilitation and presentations shall be performed in a very smooth, confident and professional manner without awkward pauses. Comprehensive post-meeting summaries shall be provided to include but not limited to: Minutes, Action Items, Attendees, Program Objectives and Milestones and major decision points.

4. SCHEDULE OF DELIVERABLES:

The Contractor shall submit all deliverables described in accordance with the Product Effectiveness Measurement Services (PEMS) Performance Work Statement, Process & Procedures, and Concept of Operations, where applicable. The Contractor shall upload and tag all deliverables onto the specified SharePoint site and send an email notification to the Contracting Officer, Contracting Officer Representative, and Program Office listing all completed deliverables and a link to their location. Deliverables shall be written clear and concise from a business value perspective and need very little, if any changes upon government review. These documents need to be written at the executive level that could be presented to VA senior program leaders, top level agency leadership and members of Congress. 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 Product Effectiveness Measurement Services (PEMS) PWS. Submission of deliverables shall be in accordance with the Product Effectiveness Measurement Services (PEMS) PWS specifications.

- a.** Deliverables are outlined in the below schedule. Listed deliverables are applicable only to those CLINs actually purchased.
- b.** Separate deliverables are required for each engagement. For example, for each engagement, there shall be separate deliverables 1.1 through 1.6.
- c.** Please refer to the Product Effectiveness Measurement Services (PEMS) Process & Procedures for deliverable descriptions, templates, and examples where indicated within the table. Where indicated, some deliverables are considered to be “living” documents, which shall be created in the first phase where the deliverable is required and then updated and delivered in subsequent phases, when applicable.. For such

living documents, the intent is to maintain a single such deliverable over the life of the project rather than having individual documents for each phase. Similarly, where indicated, other deliverables, such as Agendas, Meeting Minutes, and Communications materials are “Roll Up” deliverables of work products produced throughout the phase. Roll Up deliverables of work products produced throughout the phase. Roll Up deliverables are also intended to be maintained as single deliverables over the life of the project

Assignment of Contract Task Phases to Product Effectiveness Measurement Services

(PEMS) Engagements: Product Effectiveness Measurement Services (PEMS) engagements do not necessarily contain each of the task phases sequentially. The Product Effectiveness Program Office supports many different VHA programs and initiatives that may be at various stages of completion. Each Task Phase will be assigned by the Program Manager (PM) individually or as a full engagement (multiple task phases) based on the project selected. The contractor shall confirm engagement stakeholders, scope, business value and assessment approach strategy with the PM and receive approval prior to commencing any Task Phase under the contract.

Deliverable Schedule

Deliverable	Description or Reference	Due Date
<i>Phase 1: Rigorous Measurement (High Rigor-Phase 1.1-1.12)</i>		
<i>Sub-Phase 1.1 – Due Diligence</i>		
1.1.1: Project Plan	The contractor shall create a detailed mission focused project plan in a timely manner to guide Due Diligence project direction to include roles and responsibilities of all stakeholders (e.g., project sponsor, primary point of contact, work group members, informed stakeholders), a scoping statement that includes the objective and approach, planned deliverables and development of a project baseline. The project plan baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) to three (3) business days after start of phase and weekly updates thereafter.
1.1.2: Research/Interview Plan and Log	The Research/Interview Plan and Log shall include a comprehensive and detailed problem statement and hypothesis with an interview and research plan that will require critical thinking to support acquiring required Due Diligence information focused on the business value of healthcare and will be updated as knowledge is acquired to insure the content is current. The interview plan shall include an adequate number of interviews to obtain the necessary information to include interviews with the Product Effectiveness Director and domain (Product Effectiveness Measurement Services (PEMS), Functional Review and Lessons Learned) leads, VHA Subject Matter Experts (SME), private sector SME's and any applicable SME who would contribute valuable content to the Due Diligence. The research plan shall include but not limited to searching Product Effectiveness 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. An interview log and research log shall be created listing all resources the contractor plans to interview and	Research/Interview Plan due two (2) weeks after start of phase. Final due four (4) weeks prior to the end of the phase.

Deliverable	Description or Reference	Due Date
	<p>research. Both the interview plan and research plan shall be reviewed with and signed off by the Product Effectiveness Measurement Services (PEMS) Program Manager prior to any actions commencing on the plan. Once all interviews and research outlined in the plan have been completed justification for any interviews and research that was unable to be completed shall be reviewed with and signed off by the Product Effectiveness Measurement Services (PEMS) Program Manager.</p>	
1.1.3: Project Management Plan	<p>The Due Diligence Project Management Plan shall document engagement information in sufficient detail to allow a future project charter and/or addendum to be created and justify a full engagement (i.e., continuation to additional phases). Due Diligence 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 state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Due Diligence Project Management Plan shall answer the following key questions:</p> <ul style="list-style-type: none"> • What problem(s) or challenge is the project trying to solve? • What are VHA's choices? • What will happen if we do nothing (include risks)? • 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. <p>Due Diligence output shall identify potential project engagement opportunities for all Product Effectiveness 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 Product Effectiveness 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.</p> <p>The project management plan shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes a demonstration of the bottom line up front and enough of the independent analysis to be deemed credible.</p> <p><u>Checkpoint:</u> For the due diligence phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	<p>Outline due four (4) weeks after start of phase. Final due one (1) week prior to the end of the phase.</p>

Deliverable	Description or Reference	Due Date
1.1.4: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable.	Two (2) business days prior to the subject meeting.
1.1.5: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable repeated throughout the engagement.	One (1) business day following the subject meeting.
Sub-Phase 1.2 – Plan Engagement		
1.2.1: Project Plan	The contractor shall create a detailed mission focused project plan in a timely manner to guide the entire engagement’s direction to include roles and responsibilities of all stakeholders, a scoping statement, planned deliverables and development of a project plan baseline and approach. This project plan will serve as the baseline project plan for future project plan updates. The project baseline shall include the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall include all planned site visits. The project plan shall have ample detail to demonstrate that the contractor has the correct approach and appropriate level of effort needed for successful completion of the engagement. This project plan is not a deliverable schedule. The project plan shall include an initial successful checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) to three (3) business days after start of phase and weekly updates thereafter.
1.2.2: Charter and/or Addendum	The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.	Created in DRAFT one (1) to three (3) business days after start of phase. Final due 4 weeks from start of phase or prior to any site visits, whichever comes first.
1.2.3: Committee (SC) & User Working Group (UWG) Presentations	Steering Committee and User Working Group Presentations shall contain the information needed to initiate and guide discussions with SME’s and the User Working Group (UWG). Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.	Two (2) business days prior to the subject meeting.

Deliverable	Description or Reference	Due Date
1.2.4: Initial Workflows	Initial workflow description(s) shall be created to compare the as is and to be state from the business role perspective in preparation for validation at future site visits. Applicable processes known during this phase drive creation of initial workflows and are accurately documented. The points of process variation (impacts), potential points of failure, differences between the as is and to be state will be identified and used as key points of focus for measurements. Initial workflows will be created from a business value perspective to include applicable use cases and various applicable scenarios. Potential points of initial workflow failure will be identified. The contractor shall gather initial workflow information from existing work flows, user working groups, SME's, workflows created by other domains such as Functional Review (FR) and other applicable sources to inform the creation of the initial Product Effectiveness Measurement Services (PEMS) initial workflow. For the initial workflow to be completed a checkpoint with the Product Effectiveness stakeholders prior to proceeding shall be completed.	Four (4) weeks after start of phase
1.2.5: Site Visit Planning Report	<p>A site visit planning report document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The site visit planning report shall require critical thinking to support acquiring required information focused on the business value of healthcare. The site visit planning report shall include all information needed to prepare for a site visit. The site visit planning report shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow description of the current and future state created with input from the steering committee and user working group, a description of what is working well and opportunities for improvement, project goals, current strategies to measure success, interview questions and site visit guidelines. The site visit planning report shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. The contractor shall map site visits to an understanding of the business case and problem statements.</p> <p>The Site Visit Planning Report shall include an Executive Summary Briefing that shall serve as the entrance briefing for site visits, kickoff presentation for the user working group, presentation for subject matter expert meetings and presentations to executive leaders. The Executive Summary Briefing shall be no longer than 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and articulates the messaging of salient information at an executive level which includes bottom line up front information in plain language from a business value perspective and enough of the analysis to be deemed credible. The site visit planning report and Executive Summary Briefing will serve as the deliverable for the checkpoint at the end of the phase.</p> <p><u>Checkpoint:</u> For the plan engagement phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed at the end of this phase prior to proceeding to the next phase.</p>	Outline due two (2) weeks after start of phase. Final due one (1) week prior to the end of the phase.
1.2.6: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable.	Two (2) business days prior to the subject meeting.
1.2.7: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.	One (1) business day following the subject

Deliverable	Description or Reference	Due Date
		meeting.
Sub-Phase 1.3 – Business Value Definition and Justification		
1.3.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) business day after start of phase
1.3.2 Final Workflows	Detailed and final product workflow description(s) shall also be created that compares the as is and to be state from the business role perspective. The points of process variation (impacts) between the as is and to be state will be identified and used as key points of focus for measurements. Final workflows will be created from a business value perspective to include applicable use case and various applicable scenarios along with initial business rules. Potential points of final workflow failure will be identified. Workflows created by other domains such as Functional Review (FR) shall be leveraged to inform the creation of the Product Effectiveness Measurement Services (PEMS) final workflow. Input from site visits will also be used to assist with creation and validation of workflows, various scenarios and use cases, validation of executive messaging and overall business value. The contractor shall utilize the final workflow to validate the messaging and context for how measures relate to one another. For the final workflow to be completed a checkpoint with the Product Effectiveness stakeholders prior to proceeding shall be completed.	Two(2) weeks after start of phase
1.3.3: Report	The contractor shall develop the Business Value Definition and Justification report, in MS WORD. The Business Value Definition and Justification report shall be created to set up the hypothesis and framing of the expected outcome(s) and shall contain the beginning of the framing of baseline messaging. The Business Value Definition and Justification report is created with the purpose of developing and demonstrating a complete and thorough understanding of the problem statement, project related policies, processes, business rules, business control points and potential points of failure. This understanding shall be validated by the site visits(s) that occur in this phase. All information learned and validated at the site visit(s) shall be included in the report in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress. The contractor shall also demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met. Expected project benefits shall be clearly articulated along with measurement approaches, success factors and KPI's. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall develop "what if" scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced. The Business Value Definition and Justification Report shall include an Executive Summary that is no longer than (five) 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.	Outline due four (4) weeks after start of phase. Final due one (1) week prior to the end of the phase.

Deliverable	Description or Reference	Due Date
1.3.4 Project Briefing	<p>A presentation-style document shall be developed that provides a concise executive summary of the project's business value definition and justification and will serve as the deliverable for the checkpoint at the end of the phase and updated as knowledge is acquired to insure the content is current .</p> <p>The contractor shall demonstrate a thorough and comprehensive understanding of the business case, business value definition and justification to include a comprehensive and detailed problem statement and hypothesis, business drivers, project goals, use case scenarios, process description(s), workflow description of the current and future state, a description of what is working well and opportunities for improvement, and current strategies to measure success and Key Performance Indicators(KPI's) as these items are learned, developed and understood.</p> <p>The briefing shall contain stakeholder information, site visit planning and reporting of site visit execution information created in sub-phase 1.2 (Plan Engagement), accomplishments, schedule, and other information relevant to the project engagement. Briefings shall include an Executive Summary that is no longer than (five) 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.</p> <p><u>Checkpoint:</u> For the Business Value Definition and Justification phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	Outline due two (2) weeks after start of phase. Final due one (1) week prior to the end of the phase.
1.3.5 Meeting Agenda	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable	Two (2) business days prior to the subject meeting.
1.3.6: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable	One (1) business day following the subject meeting.
Sub-Phase 1.4-Define Benefits		
1.4.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) business day after start of phase
1.4.2: Long List of Applicable Benefits	<p>The contractor shall develop the Long List of Applicable Benefits document to demonstrate the comprehensive list of applicable benefit(s), measurement grouping(s), metric(s) that may be realized as a result of the project.</p> <p>The Long List of Applicable Benefits is developed based on all knowledge acquired from interviews, research, validated workflow(s), project hypothesis, simulations, project success factors, KPI's, business roles, potential benefit(s), measurement grouping(s), metric(s), knowledge of data availability, site visit input and all previous engagement information.</p>	Two(2) weeks after start of phase

Deliverable	Description or Reference	Due Date
	<p>The Long List of Applicable Benefits shall demonstrate an understanding of the business case, policies, processes, business control points and potential points of failure related to the benefit(s), measurement grouping(s), metric(s), operational definition and applicability to the business case and business problem being solved. The contractor shall include all elements of a measurement plan to include an abridged rationale for each benefit(s), measurement grouping(s), metric(s) on the Long List of Applicable Benefits, importance to stakeholders, desired outcome, data source (if known), measurement grouping linkages to the business case and timeframe for data collection. The contractor shall insure that there is ample information in the Long List of Applicable benefits to perform a Performance Metric Rating (PMR) which follow in the next sub-phase.</p> <p>The contractor shall include any facts (data) that can be qualitatively and quantitatively measured. Foundational, functional and adoption benefits shall be identified and included that must be achieved before additional operational and strategic benefits are fully realized. The purpose of the document is to demonstrate identification all of the applicable benefit(s), measurement grouping(s), and metric(s) associated with the project, regardless of priority or measurement feasibility from a measurement plan perspective.</p>	
1.4.3: <i>Performance Metric Rating and Short List of Benefits</i>	<p>The contractor shall validate the final benefit(s), measurement grouping(s), metric(s) that will be included in the Short List of Benefits based on the Performance Metric Rating (PMR). The contractor shall use the PMR to evaluate each of the benefits and performance measures and metrics within the Long List of Applicable Benefits in order to determine which are the most qualified benefit(s), measurement grouping(s) and metric(s) to include that will proving the value of the investment and be evaluated as part of the Product Effectiveness Measurement Services (PEMS) assessment.</p> <p>The contractor shall derive an overall Performance Measure Rating (PMR) for each performance measures by evaluating them based on (1) Benefit Applicability (2) Data availability (3) Data integrity (4) Data Measurability (qualitative or quantitative) (5) Data Collection Effort required based on their own knowledge and input from other domains, Product Effectiveness Measurement Services (PEMS) Program Manager, Product Effectiveness Director and SME's to determine which performance measures from the Long List of Applicable Benefit will be ultimately be evaluated as part of the assessment. The contractor shall refer to the Product Effectiveness Measurement Services (PEMS) Process and Procedures document PRM process to successfully complete this deliverable. The contractor shall understand the PMR process, operational definition of the metric being rated and expected measurement output from the PMR. PMR output will be reviewed and approved with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to finalization of the Short List of Benefits.</p> <p>The Short List of Benefits shall include the results of the PMR. The Short List of Benefits shall demonstrate inclusion of benefit(s), measurement grouping(s), metric(s) that have a confirmed applicability, data availability, data integrity, data measurability, data collection effort and alignment to the business case. The short list of Benefits shall demonstrate all of benefit(s), measurement grouping(s), metric(s) required to successfully and completely measure attainment of all intended benefits and project goals. The short list of Benefits shall include a rationale for inclusion of each benefit(s), measurement grouping(s), metric(s) on the list with supporting information to highlight the importance of why it is on the list and includes the linkages to the business value and the project goals.</p>	Three(3) weeks after start of phase
1.4.4: Project	The contractor shall develop a comprehensive Define Benefits Project Briefing that demonstrates a complete, well defined and comprehensive list of quantitative and qualitative measures and metrics and related data	Outline due two (2) weeks after start of

Deliverable	Description or Reference	Due Date
Briefing	<p>sources and updated as knowledge is acquired to insure the content is current. The purpose of the Define Benefits Project Briefing is to demonstrate a full understanding of project related policies, processes, business rules, business control points and potential points of failure and the benefit(s), measurement grouping(s), metric(s) related to them.</p> <p>The contractor shall demonstrate the logic and rationale for inclusion of all benefit(s), measurement grouping(s) and metric(s) including those that demonstrates variations between the as is and to be workflow and points of impact from a business role perspective to validate key points of measurement. Project Briefings shall include an Executive Summary that is no longer than (five) 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front (BLUF) and sufficient analysis to be deemed credible.</p> <p><u>Checkpoint:</u> For the define benefits phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase</p>	phase. Final due one (1) week prior to the end of the phase.
1.4.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable	Two (2) business days prior to the subject meeting.
1.4.6: Meeting Minutes	Minutes of all meetings related to the phase. . This is a "Roll Up" deliverable.	One (1) business day following the subject meeting.
Sub-Phase 1.5 - Measurement Plan		
1.5.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) business day after start of phase
1.5.2: Measurement Plan	<p>All quantitative and qualitative measure(s), measurement grouping(s), and metrics shall be described and demonstrate data definition(s), a detailed and comprehensive rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Measurement Plan shall include the following:</p> <ul style="list-style-type: none"> <u>Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources:</u> All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the comprehensive measurement plan. <u>Foundational Benefits:</u> Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated in detail. 	Two (2) weeks after start of phase

Deliverable	Description or Reference	Due Date
	<ul style="list-style-type: none"> <u>Hypothesis</u>: The Measurement Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect. <u>Dependencies and Correlations</u>: benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis. <u>Simulated Examples</u>: Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case. <p><u>Checkpoint</u>: For the measurement plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	
1.5.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting
1.5.4: Meeting Minutes	Minutes of all meetings related to the phase. . This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
Phase 1.6 – Data Collection and Analysis		
1.6.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) business day after start of phase and
1.6.2: Project Analysis and Preliminary Findings Report	<p>The contractor shall populate all metrics described in the Measurement Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate a complete and comprehensive review of how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:</p> <ul style="list-style-type: none"> <u>Foundational Benefits</u>: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized. 	Three (3) weeks after start of phase and one week after completion of information gathering. One additional update due one (1) week prior to the end of the phase.

Deliverable	Description or Reference	Due Date
	<ul style="list-style-type: none"> Hypothesis: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary. Dependencies and Correlations: The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness. Simulated Examples: The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary. <p>The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare the Project Analysis and Preliminary Findings Report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.</p> <p>Checkpoint: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	
1.6.3: Data Collection and Analysis-Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
1.6.4: Data Collection and Analysis-Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
Sub-Phase 1.7 –Reporting		
1.7.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) business day after start of phase

Deliverable	Description or Reference	Due Date
1.7.2: Report of Findings	<p>The contractor shall deliver a Report of Findings ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The Report of Findings shall also include and demonstrate any salient points that were identified in the Measurement Plan and Data Collection and Analysis Phase. When the Report of Findings is being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the Report of Findings.</p> <p>Report of Findings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the Executive Summary, the Report of Findings shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the summary of findings, the Report of Findings body (target fifteen (15) pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the report. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.</p> <p>A separate one (1) page stand-alone document known as a Quick Facts shall accompany the Report of Findings and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.</p> <p><u>Checkpoint:</u> For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.</p>	<p>Outline due ten (10) business days after start of phase. Final due one (1) week prior to the end of the phase.</p>
1.7.3: Project Briefing	<p>The contractor shall develop a comprehensive Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Project Briefing is serve as an executive summary which includes critical findings to demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or “no go. The Project Briefing shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and</p>	<p>Outline due two (2) weeks after start of phase. Final due one (1) week prior to the end of the phase.</p>

Deliverable	Description or Reference	Due Date
	members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.	
1.7.4: Data	All project raw data supporting the Report of Findings that have been gathered during the Product Effectiveness Measurement Services (PEMS) project (e.g., workbooks, interview notes, and survey data) shall be uploaded to the Product Effectiveness Share Point Site. This should also include any cleansed or normalized presentation of the data.	Due one (1) week prior to the end of the phase.
1.7.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
1.7.6: Reporting-Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
Sub-Phase 1.8 – Post Implementation-Plan Engagement		
1.8.1: Project Plan	The contractor shall create a detailed mission focused baseline project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline. The baseline 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 entire engagement to successful completion. The project plan shall include an initial successful checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) to three (3) business day after start of phase
1.8.2: Charter and/or Addendum	The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.	Created in DRAFT one (1) to three (3) business days after start of phase. Final due 4 weeks from start of phase or prior to any site visits, whichever comes first.
1.8.3: Steering Committee (SC) & User Working Group (UWG)	Steering Committee and User Working Group Presentations shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare. Meeting presentations shall drive to an understanding	Two (2) business days prior to the subject meeting.

Deliverable	Description or Reference	Due Date
<i>Presentations</i>	of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.	
1.8.4: Business Value Report	<p>The contractor shall develop the Business Value report, in MS WORD format, with the purpose of developing and demonstrating a complete and thorough understanding of the problem statement, project related policies, processes, business rules, business control points and potential points of failure. This understanding shall be validated by the site visits(s) that occur in this phase. All information learned and validated at the site visit(s), shall be included in the Business Value report in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress.</p> <p>The contractor shall also demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met. Expected project benefits shall be clearly articulated along with measurement approaches, success factors and Key Performance Indicators (KPI's). The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall develop "what if" scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced.</p> <p>The Business Value report shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.</p> <p><u>Checkpoint:</u> For the measurement plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	Outline due two (2) weeks after start of phase. Final due one (1) week prior to the end of the phase.
1.8.5 Project Briefing	<p>A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare. The project briefing shall include all information needed to prepare for a site visit and shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. The project briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow description of the current and future state created with input from the steering committee and user working group, a description of what is working well and opportunities for improvement, project goals, current strategies to measure success, interview questions and site visit guidelines. The project briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). The contractor shall map site visits to an understanding of the business case and problem statements.</p> <p>Project briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and</p>	Outline due two (2) weeks after start of phase. Final due one (1) week prior to the end of the phase.

Deliverable	Description or Reference	Due Date
	members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible. The project briefing shall be reviewed with the BR Program Manager weekly updated weekly and will serve as the deliverable for the checkpoint at the end of the phase.	
1.8.6 Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
1.8.7: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
Sub-Phase 1.9 – Post Implementation-Measurement Plan		
1.9.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) business day after start of phase
1.9.2: Measurement Plan Update	<p>The contractor shall update the Baseline/Initial Engagement Measurement Plan to reflect any added, deleted or updated benefit(s), measurement grouping(s) or metrics needed to successfully measure the business value impact of the change from the baseline/initial measurement in the post implementation measurement. The contractor shall verify assumptions, refine evaluation strategies, validate evaluation plans, and/or pilot questionnaire content. All quantitative and qualitative measure(s), measurement grouping(s), and metrics shall be described and demonstrate data definition(s), a detailed and comprehensive rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Measurement Plan shall include the following:</p> <ul style="list-style-type: none"> • <u>Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources:</u> All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the comprehensive measurement plan. • <u>Foundational Benefits:</u> Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated in detail. • <u>Hypothesis:</u> The Measurement Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect. • <u>Dependencies and Correlations:</u> benefit(s), measurement grouping(s), metric(s) interdependencies and comparative 	Two (2) weeks after start of phase

Deliverable	Description or Reference	Due Date
	<p>analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis.</p> <ul style="list-style-type: none"> <u>Simulated Examples</u>: Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case. <p><u>Checkpoint</u>: For the measurement plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	
1.9.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
1.9.4: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
Sub-Phase 1.10 – Post Implementation-Data Collection & Analysis		
1.10.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) business day after start of phase and weekly updates thereafter
1.10.2: Preliminary Findings Report	<p>The contractor shall populate all metrics described in the Measurement Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate a complete and comprehensive review of how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:</p> <ul style="list-style-type: none"> <u>Foundational Benefits</u>: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized. <u>Hypothesis</u>: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary. <u>Dependencies and Correlations</u>: The analysis shall include 	Two (2) weeks after start of project and one week after completion of information gathering. One additional update due one (1) week prior to the end of the phase.

Deliverable	Description or Reference	Due Date
	<p>demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.</p> <ul style="list-style-type: none"> • <u>Simulated Examples</u>: The analysis shall include input of actual data in the simulation models created in the Post Implementation Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary. <p>The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare this report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.</p> <p><u>Checkpoint</u>: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	
1.10.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
1.10.4: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
Phase 1.11 – Post Implementation-Reporting		
1.11.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) to three (3) business days after start of phase and weekly updates thereafter
1.11.2: Report of Findings	The contractor shall deliver a Report of Findings ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The Report of Findings shall also include and demonstrate any salient points that were identified in the Post Implementation Measurement Plan and Data Collection and Analysis Phase.	Three (3) weeks after start of phase and one week after completion of information gathering. One additional update due

Deliverable	Description or Reference	Due Date
	<p>When Reports of Findings are being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the report</p> <p>Report of Findings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the Executive Summary, the Report of Findings shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the summary of findings, the report body (target fifteen (15) pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the Report of Findings. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.</p> <p>A separate one (1) page stand-alone document known as a Quick Facts shall accompany the Report of Findings and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.</p>	one (1) week prior to the end of the phase.
1.11.3 Project Briefing	<p>The contractor shall develop a Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Project Briefing is to serve as an executive summary which includes critical findings to demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or “no go.”</p> <p>The Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.</p> <p><u>Checkpoint:</u> For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.</p>	Outline due two (2) weeks after start of phase. Final due one (1) week prior to the end of the phase.
1.11.4: Data	All project raw data supporting the Report of Findings that have been gathered during the Product Effectiveness Measurement Services (PEMS)	Due one (1) week prior to

Deliverable	Description or Reference	Due Date
	project (e.g., workbooks, interview notes, and survey data). This should also include any cleansed or normalized presentation of the data.	the end of the phase.
1.11.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
1.11.6: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
Sub-Phase 1.12 – Lessons Learned		
1.12.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> or <i>Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan</i> as applicable to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) business day after start of phase
1.12.2 Report of Findings	<p>The contractor shall create a document that describes the comprehensive lessons learned from the Product Effectiveness Measurement Services (PEMS) engagement project, addressing each task and subtask of the project. Lessons Learned shall be gathered at each phase of an engagement as it progresses and be shared with the project stakeholders. This report will include retrospective accomplishments to demonstrate if goals for the evaluation were accomplished and recommendations for any improvements needed for future engagement successes. Lessons Learned shall include findings written in a concise format intended for internal use by Product Effectiveness, current and future engagement stakeholders and senior program leaders, top level agency leadership and members of Congress. All findings, lessons, naming conventions, and other data developed through all phases shall comply with conventions established to support use within the Product Effectiveness Knowledgebase.</p> <p>Lessons Learned shall include a self-assessment of the customer engagement, based on planned and realized value of the engagement to the Product Effectiveness customer. This deliverable shall demonstrate the objective and subjective value of the Product Effectiveness Measurement Services (PEMS) 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 Product Effectiveness Program.</p> <p><u>Checkpoint:</u> For the lessons learned phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.</p>	SharePoint Lessons Learned Log updated weekly, Report due one (1) week prior to end of the engagement.
1.12.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
1.12.4: Meeting	Minutes of all meetings related to the phase. This is a “Roll Up”	One (1) business day

Deliverable	Description or Reference	Due Date
Minutes	deliverable.	following the subject meeting.
<u>Phase 2: Evaluation (Medium Rigor-Phase 2.1-2.8)</u>		
<u>Sub-Phase 2.1 – Evaluation-Engagement Plan</u>		
2.1.1: Project Plan	The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the lifecycle of the project (6-8 weeks) as defined by Product Effectiveness. The project baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) to three (3) business days after start of phase and weekly updates thereafter
2.1.2: Charter and/or Addendum	The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.	One (1) to three (3) business days after start of phase and weekly updates thereafter
2.1.3: Steering Committee (SC) & User Working Group (UWG) Presentations	Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare with the goal of including all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting presentations shall also be used to discuss project status, validate information and understandings, validate evaluation plans, and/or pilot questionnaire content, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.	Two (2) business days prior to the subject meeting.

Deliverable	Description or Reference	Due Date
2.1.4: Project Briefing	<p>A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare and include all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project.</p> <p>The project briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow descriptions, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Workflows will be created from a business value perspective to include points of process variation (impacts), potential points of failure, applicable use cases and various applicable scenarios. Potential points of workflow failure will be identified. The contractor shall gather workflow information from existing work flows, user working groups, SME's, workflows created by other domains such as Functional Review (FR) and other applicable sources to inform the creation of the workflow. The contractor shall utilize the final workflow to validate the messaging and context for how measures relate to one another.</p> <p>The project briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). The project briefing shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. All information learned and validated at the site visit(s) shall be included in the report in a concise format. The contractor shall map site visits to an understanding of the business case and problem statements.</p> <p>Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible. The briefing shall be reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager weekly updated weekly and will serve as the deliverable for the checkpoint at the end of the phase</p>	Outline due two (2) weeks after start of phase. Final due one (1) week prior to the end of the phase.
2.1.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable	Two (2) business days prior to the subject meeting.
2.1.6: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.	One (1) business day following the subject meeting.
Sub-Phase 2.2 – Evaluation: <i>Evaluation Plan</i>		
2.2.1: Evaluation Plan	<p>All <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project shall be described and demonstrate data definition(s), an abridged rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Evaluation Plan shall include the following:</p> <ul style="list-style-type: none"> Integrate Benefit(s), Measurement Grouping(s) and Metric(s) <u>from All Sources</u>: All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all 	Three (3) weeks after start of evaluation phases (Sub-Phase 2.1)

Deliverable	Description or Reference	Due Date
	<p>other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the evaluation plan if deemed critical to rapidly (6-8 weeks) measure project success.</p> <ul style="list-style-type: none"> • <u>Foundational Benefits</u>: Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated. • <u>Hypothesis</u>: The Evaluation Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect. • <u>Dependencies and Correlations</u>: benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis. • <u>Simulated Examples</u>: Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case. <p><u>Checkpoint</u>: For the evaluation plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	
2.2.2: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable	Two (2) business days prior to the subject meeting.
2.2.3: -Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.	One (1) business day following the subject meeting.
Sub-Phase 2.3: Evaluation-Data Collection & Analysis		
2.3.1: Preliminary Findings Report	<p>The contractor shall populate all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project and described in the Evaluation Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:</p> <ul style="list-style-type: none"> • <u>Foundational Benefits</u>: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall 	Five (5) weeks after start of evaluation phases (Sub-phase-2.2)

Deliverable	Description or Reference	Due Date
	<p>be proven to be achieved before additional operational and strategic benefits are fully realized.</p> <ul style="list-style-type: none"> <u>Hypothesis</u>: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary. <u>Dependencies and Correlations</u>: The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness. <u>Simulated Examples</u>: The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary. <p>The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare this Preliminary Findings Report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.</p> <p><u>Checkpoint</u>: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	
2.3.2: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable	Two (2) business days prior to the subject meeting.
2.3.3: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.	One (1) business day following the subject meeting.
Sub-Phase 2.4 – Evaluation: <i>Final Report</i>		
2.4.1: Final Report	The contractor shall deliver a <u>concise and rapid (6-8 weeks)</u> report to demonstrate critical findings in a format ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The report shall also include and demonstrate any salient points that were identified in the Evaluation Plan and Data Collection and Analysis Phase. When reports are being created with multiple data sources and domain inputs,	Outline due four (4) weeks after start of phase. Final due one (1) week prior to the end of the phase.

Deliverable	Description or Reference	Due Date
	<p>there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the report.</p> <p>Final Reports shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the Executive Summary, the Final Report shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the summary of findings, the report body (target 15 pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the report. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.</p> <p>A separate one (1) page stand-alone document known as a Quick Facts shall accompany the report and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.</p> <p><u>Checkpoint:</u> For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.</p>	
2.4.2: Project Briefing	<p>The contractor shall develop a <u>concise</u> Evaluation Final Report Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Evaluation Final Report Project Briefing is to serve as an executive summary which includes <u>critical</u> findings to <u>concisely and rapidly</u> (6-8 weeks) demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or “no go.”</p> <p>Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.</p>	Outline due two (2) weeks after start of phase. Final due one (1) week prior to the end of the phase.

Deliverable	Description or Reference	Due Date
2.4.3: Data	All project raw data supporting the Report of Findings that have been gathered during the Product Effectiveness Measurement Services (PEMS) project (e.g., workbooks, interview notes, and survey data). This should also include any cleansed or normalized presentation of the data.	Due one (1) week prior to the end of the phase.
2.4.4: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
2.4.5: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
Sub-Phase 2.5 – Evaluation: <i>Post Implementation-Engagement Plan</i>		
2.5.1: Project Plan	The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the lifecycle of the project (6-8 weeks) as defined by Product Effectiveness. The project baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	One (1) to three (3) business day after start of phase
2.5.2: Charter and/or Addendum	The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.	Created in DRAFT one (1) to three (3) business days after start of phase. Final due 4 weeks from start of phase or prior to any site visits, whichever comes first.
2.5.3: Steering Committee and User Working Group Presentations	Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare with the goal of updating the existing evaluation plan including all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points,	Two (2) business days prior to the subject meeting.

Deliverable	Description or Reference	Due Date
	potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. The contractor shall facilitate, schedule, and document all meetings with program staff and potential customers. Meeting presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.	
2.5.4: Project Briefing	<p>A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare and include all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project.</p> <p>The project briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow descriptions, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Workflows will be created from a business value perspective to include points of process variation (impacts), potential points of failure, applicable use cases and various applicable scenarios. Potential points of workflow failure will be identified. The contractor shall gather workflow information from existing work flows, user working groups, SME's, workflows created by other domains such as Functional Review (FR) and other applicable sources to inform the creation of the workflow. The contractor shall utilize the final workflow to validate the messaging and context for how measures relate to one another.</p> <p>The project briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). The project briefing shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. All information learned and validated at the site visit(s) shall be included in the report in a concise format. The contractor shall map site visits to an understanding of the business case and problem statements.</p> <p>Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible. The briefing shall be reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager weekly updated weekly and will serve as the deliverable for the checkpoint at the end of the phase.</p>	Outline due two (2) weeks after start of phase. Final due one (1) week prior to the end of the phase.
2.5.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable	Two (2) business days prior to the subject meeting.
2.5.6: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.	One (1) business day following the subject meeting.

Deliverable	Description or Reference	Due Date
Sub-Phase 2.6 Evaluation-Post Implementation Evaluation Plan Update		
2.6.1: Evaluation Plan	<p>All project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project shall be described and demonstrate data definition(s), an abridged rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Evaluation Plan shall include the following:</p> <ul style="list-style-type: none"> • <u>Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources</u>: All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the evaluation plan if deemed critical to rapidly (6-8 weeks) measure project success. • <u>Foundational Benefits</u>: Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated. • <u>Hypothesis</u>: The Evaluation Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect. • <u>Dependencies and Correlations</u>: benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis. • <u>Simulated Examples</u>: Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case. <p><u>Checkpoint</u>: For the evaluation plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	Three (3) weeks after start of evaluation phases (Sub-Phase 2.6)
2.6.2: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
2.6.3: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
Sub-Phase 2.7 Evaluation-Post Implementation-Data Collection and Analysis		
2.7.1:	The contractor shall populate all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u>	Five (5) weeks after start

Deliverable	Description or Reference	Due Date
Preliminary Findings Report	<p>(6-8 weeks) evaluate success of the project and described in the Post Implementation Evaluation Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:</p> <ul style="list-style-type: none"> • <u>Foundational Benefits</u>: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized. • <u>Hypothesis</u>: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary. • <u>Dependencies and Correlations</u>: The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness. • <u>Simulated Examples</u>: The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary. <p>The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare this Preliminary Findings Report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.</p> <p><u>Checkpoint</u>: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	of evaluation phases (Sub-phase-2.5)
2.7.2: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
2.7.3: Meeting	Minutes of all meetings related to the phase. This is a “Roll Up”	One (1) business day

Deliverable	Description or Reference	Due Date
Minutes	deliverable.	following the subject meeting.
Sub-Phase 2.8-Evaluation-Post Implementation-Final Report		
2.8.1: Final Report	<p>The contractor shall deliver a <u>concise and rapid (6-8 weeks)</u> report to demonstrate critical findings in a format ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The report shall also include and demonstrate any salient points that were identified in the Post Implementation-Evaluation Plan and Post Implementation-Data Collection and Analysis Phase. When reports are being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the report.</p> <p>Post Implementation-Final Reports shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the Executive Summary, the Final Report shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the summary of findings, the report body (target 15 pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the report. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.</p> <p>A separate one (1) page stand-alone document known as a Quick Facts shall accompany the report and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.</p>	<p>Outline due four (4) weeks after start of phase.</p> <p>Final due one (1) week prior to the end of the phase.</p>
2.8.2: Project Briefing	<p>The contractor shall develop a <u>concise</u> Post Implementation- Final Report Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Evaluation Final Report Project Briefing is to serve as an executive summary which includes <u>critical</u> findings to <u>concisely and rapidly</u> (6-8 weeks) demonstrate the business value of the engagement</p>	<p>Outline due two (2) weeks after start of phase. Final due one (1) week prior to the</p>

Deliverable	Description or Reference	Due Date
	<p>investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or “no go.</p> <p>Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.</p> <p><u>Checkpoint:</u> For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.</p>	end of the phase.
2.8.3: Data	All project raw data supporting the Report of Findings that have been gathered during the Product Effectiveness Measurement Services (PEMS) project (e.g., workbooks, interview notes, and survey data). This should also include any cleansed or normalized presentation of the data.	Due one (1) week prior to the end of the phase.
2.8.4: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
2.8.5: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
<p align="center"><u>Phase 3: Assessment (Low rigor-Phase 3.1)</u></p> <p align="center">Sub-Phase 3.1 – Assessment</p>		
3.1.1: Project Plan	<p>The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the brief (2-4 weeks) lifecycle of the project as defined by Product Effectiveness.</p> <p>The project plan baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.</p>	One (1) to three (3) business days after start of phase and weekly updates thereafter
3.1.2: Business Value Assessment	The contractor shall develop the Assessment-Business Value Assessment Report, in MS WORD format, with the purpose of developing and demonstrating an understanding of the effectiveness of the change being assessed. The Business Value Assessment Report shall include a basic, structured assessment plan that defines a measurement approach that may	Outline due four (4) weeks after start of phase. Final due one (1) week

Deliverable	Description or Reference	Due Date
Report	<p>serve as a pre-cursor to a comprehensive measurement plan.</p> <p>A complete and thorough understanding of the problem statement, project related policies, processes, business rules, business control points and potential points of failure shall be demonstrated in the Business Value Assessment Report in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress. The contractor shall also demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met. Expected project benefits shall be clearly articulated in a basic, structured assessment plan that defines a measurement approach that may serve as a pre-cursor to a comprehensive measurement plan. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall develop “what if” scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced.</p> <p>The Business Value Assessment Report shall include an Executive Summary that is no longer than five (5) pages, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.</p>	prior to the end of the phase.
3.1.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Two (2) business days prior to the subject meeting.
3.1.4: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	One (1) business day following the subject meeting.
<p align="center">Program Management</p> <p><i>Product Effectiveness Measurement Services (PEMS) Program Management encompasses program and project management activities to include weekly status reports, monthly accomplishment reports and additional Steering Committee and User Working Group meetings needed throughout the entire lifecycle of the contract. Program Management Products shall be uploaded to the PE Program SharePoint site.</i></p>		
<p align="center">Contract Program Management</p>		
Contract Program Management	Weekly Status Report (n=52): This deliverable is a weekly report of status of milestones, project plan timeline compliance, activates and accomplishments, and shall include actions, issues, and risks. This report shall serve as the agenda for the weekly Product Effectiveness Measurement Services status meeting. This report shall also contain a table of the awarded Task Phases and Deliverables listing their status (assigned/unassigned) as well as the customer engagement assigned. This report shall also contain Product Effectiveness Measurement Services Program Pipeline strategy and shall include recommendations for provision of PE services to current or potential engagement customers. Deliverable applies to all engagements in the contract.	Weekly throughout the lifecycle of the contract
	Monthly Accomplishments Report (n=12): This deliverable provides updates to the report of accomplishments for the engagement. Engagement accomplishments shall be reported as “track changes” updates to the PE Monthly Accomplishments 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 PE Monthly Accomplishments Report. Deliverable applies to all	Monthly throughout the lifecycle of the contract

Deliverable	Description or Reference	Due Date
	engagements in the contract.	
Post Engagement Business Value Report	Produce Effectiveness Measurement Services (PEMS) Post Engagement Business Value Report (PEBVR) includes a post-engagement review of the impact and business value provided by Product Effectiveness (PE) to the enterprise (e.g., to what extent was Product Effectiveness (PE) able to achieve its goals and objectives for the evaluation?). This report will include a detailed and comprehensive account of engagement accomplishments, including how findings align with VA, VHA and Product Effectiveness (PE) strategic goals and objectives and the value of the findings in supporting strategic decisions.	As needed as determined by Product Effectiveness
Steering Committee and User Working Group Meeting Presentations	This deliverable provides for additional Steering Committee, User Working Group and Subject matter Expert meetings when needed as determined by Product Effectiveness (PE). The effort involved related to this deliverable would be for five (5) Steering Committee and User Working Group Meetings and related presentations, meeting agenda's and minutes.	As needed as determined by Product Effectiveness

Assignment of Contract Task Phases to Product Effectiveness Measurement Services (PEMS) Engagements: Product Effectiveness Measurement Services (PEMS) engagements do not necessarily contain each of the task phases sequentially. The Product Effectiveness Program Office supports many different VHA programs and initiatives that may be at various stages of completion. Each Task Phase will be assigned by the Program Manager (PM) individually or as a full engagement (multiple task phases) based on the project selected. The contractor shall confirm engagement stakeholders, scope, business value and assessment approach strategy with the PM and receive approval prior to commencing any Task Phase under the contract.

Price/Cost Schedule

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
Phase 1: Rigorous Measurement (High Rigor-Phase 1.1-1.12)					
Sub-Phase 1.1 – Due Diligence					
1.1.1: Project Plan	The contractor shall create a detailed mission focused project plan in a timely manner to guide Due Diligence project direction to include roles and responsibilities of all stakeholders (e.g., project sponsor, primary point of contact, work group members, informed stakeholders), a scoping statement that includes the objective and approach, planned deliverables and development of a project baseline. The project plan baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	Large		Ea.	
		Med		Ea.	
		Small		Ea.	

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.1.2: Research/Interview Plan and Log	The Research/Interview Plan and Log shall include a comprehensive and detailed problem statement and hypothesis with an interview and research plan that will require critical thinking to support acquiring required Due Diligence information focused on the business value of healthcare and will be updated as knowledge is acquired to insure the content is current. The interview plan shall include an adequate number of interviews to obtain the necessary information to include interviews with the Product Effectiveness Director and domain (Product Effectiveness Measurement Services (PEMS), Functional Review and Lessons Learned) leads , VHA Subject Matter Experts (SME), private sector SME's and any applicable SME who would contribute valuable content to the Due Diligence. The research plan shall include but not limited to searching Product Effectiveness 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. An interview log and research log shall be created listing all resources the contractor plans to interview and research. Both the interview plan and research plan shall be reviewed with and signed off by the Product Effectiveness Measurement Services (PEMS) Program Manager prior to any actions commencing on the plan. Once all interviews and research outlined in the plan have been completed justification for any interviews and research that was unable to be completed shall be reviewed with and signed off by the Product Effectiveness Measurement Services (PEMS) Program Manager.	Large		Ea.	
		Med		Ea.	
		Small		Ea.	
1.1.3: Project Management Plan	The Due Diligence Project Management Plan shall document engagement information in sufficient detail to allow a future project charter and/or addendum to be created and justify a full engagement (i.e., continuation to additional phases). Due Diligence 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 state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Due Diligence Project Management Plan shall answer the following key questions: <ul style="list-style-type: none">What problem(s) or challenge is the project trying to solve?What are VHA's choices?What will happen if we do nothing (include risks)?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 output shall identify potential project engagement opportunities for all Product Effectiveness domains and be described and prioritized based on value, impact, scope, cost, objective of the engagement identified and an assessment	Large		Ea.	
		Med		Ea.	

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	<p>of the stakeholder’s desire for Product Effectiveness 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.</p> <p>The project management plan shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes a demonstration of the bottom line up front and enough of the independent analysis to be deemed credible.</p> <p>Checkpoint: For the due diligence phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	Small		Ea.	
1.1.4: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable.	Large		Ea.	
		Med		Ea.	
		Small		Ea.	
1.1.5: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable repeated throughout the engagement.	Large		Ea.	
		Med		Ea.	
		Small		Ea.	
1.2.1: Project Plan	The contractor shall create a detailed mission focused project plan in a timely manner to guide the entire engagement’s direction to include roles and responsibilities of all stakeholders, a scoping statement, planned deliverables and development of a project plan baseline and approach. This project plan will serve as the baseline project plan for future project plan updates. The project baseline shall include the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall include all planned site visits. The project plan shall have ample detail to demonstrate that the contractor has the correct approach and appropriate level of effort needed for successful completion of the engagement. This project plan is not a deliverable schedule. The project plan shall include an initial successful checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.2.2: Charter and/or Addendum	The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.		Ea.		
1.2.3: Committee (SC) & User Working Group (UWG) Presentations	Steering Committee and User Working Group Presentations shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.		Ea.		
1.2.4: Initial Workflows	Initial workflow description(s) shall be created to compare the as is and to be state from the business role perspective in preparation for validation at future site visits. Applicable processes known during this phase drive creation of initial workflows and are accurately documented. The points of process variation (impacts), potential points of failure, differences between the as is and to be state will be identified and used as key points of focus for measurements. Initial workflows will be created from a business value perspective to include applicable use cases and various applicable scenarios. Potential points of initial workflow failure will be identified. The contractor shall gather initial workflow information from existing work flows, user working groups, SME's, workflows created by other domains such as Functional Review (FR) and other applicable sources to inform the creation of the initial Product Effectiveness Measurement Services (PEMS) initial workflow. For the initial workflow to be completed a checkpoint with the Product Effectiveness stakeholders prior to proceeding shall be completed.		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.2.5: Site Visit Planning Report	<p>A site visit planning report document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The site visit planning report shall require critical thinking to support acquiring required information focused on the business value of healthcare. The site visit planning report shall include all information needed to prepare for a site visit. The site visit planning report shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow description of the current and future state created with input from the steering committee and user working group, a description of what is working well and opportunities for improvement, project goals, current strategies to measure success, interview questions and site visit guidelines. The site visit planning report shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. The contractor shall map site visits to an understanding of the business case and problem statements.</p> <p>The Site Visit Planning Report shall include an Executive Summary Briefing that shall serve as the entrance briefing for site visits, kickoff presentation for the user working group, presentation for subject matter expert meetings and presentations to executive leaders. The Executive Summary Briefing shall be no longer than 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and articulates the messaging of salient information at an executive level which includes bottom line up front information in plain language from a business value perspective and enough of the analysis to be deemed credible. The site visit planning report and Executive Summary Briefing will serve as the deliverable for the checkpoint at the end of the phase.</p> <p><u>Checkpoint:</u> For the plan engagement phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed at the end of this phase prior to proceeding to the next phase.</p>		Ea.		
1.2.6: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable.		Ea.		
1.2.7: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.		Ea.		
1.3.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.3.2 Final Workflows	<p>Detailed and final product workflow description(s) shall also be created that compares the as is and to be state from the business role perspective. The points of process variation (impacts) between the as is and to be state will be identified and used as key points of focus for measurements. Final workflows will be created from a business value perspective to include applicable use case and various applicable scenarios along with initial business rules. Potential points of final workflow failure will be identified.</p> <p>Workflows created by other domains such as Functional Review (FR) shall be leveraged to inform the creation of the Product Effectiveness Measurement Services (PEMS) final workflow. Input from site visits will also be used to assist with creation and validation of workflows, various scenarios and use cases, validation of executive messaging and overall business value. The contractor shall utilize the final workflow to validate the messaging and context for how measures relate to one another. For the final workflow to be completed a checkpoint with the Product Effectiveness stakeholders prior to proceeding shall be completed.</p>		Ea.		
1.3.3: Report	<p>The contractor shall develop the Business Value Definition and Justification report, in MS WORD. The Business Value Definition and Justification report shall be created to set up the hypothesis and framing of the expected outcome(s) and shall contain the beginning of the framing of baseline messaging. The Business Value Definition and Justification report is created with the purpose of developing and demonstrating a complete and thorough understanding of the problem statement, project related policies, processes, business rules, business control points and potential points of failure. This understanding shall be validated by the site visits(s) that occur in this phase. All information learned and validated at the site visit(s) shall be included in the report in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress. The contractor shall also demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met.</p> <p>Expected project benefits shall be clearly articulated along with measurement approaches, success factors and KPI's. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall develop "what if" scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced. The Business Value Definition and Justification Report shall include an Executive Summary that is no longer than (five) 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.</p>		Ea.		
1.3.4 Project Briefing	<p>A presentation-style document shall be developed that provides a concise executive summary of the project's business value definition and justification and will serve as the deliverable for the checkpoint at the end of the phase and updated as knowledge is acquired to insure the content is current .</p> <p>The contractor shall demonstrate a thorough and comprehensive understanding of the business case, business value definition and justification to include a comprehensive and detailed problem statement and hypothesis, business drivers, project goals, use case scenarios, process description(s), workflow description of the current and future state, a description of what is working well and opportunities for improvement, and current strategies to measure success and Key Performance Indicators(KPI's) as these items are learned, developed and understood.</p>		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	The briefing shall contain stakeholder information, site visit planning and reporting of site visit execution information created in sub-phase 1.2 (Plan Engagement), accomplishments, schedule, and other information relevant to the project engagement. Briefings shall include an Executive Summary that is no longer than (five) 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.				
1.3.5 Meeting Agenda	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable		Ea.		
1.3.6: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable		Ea.		
Sub-Phase 1.4-Define Benefits					
1.4.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.		Ea.		
1.4.2: Long List of Applicable Benefits	<p>The contractor shall develop the Long List of Applicable Benefits document to demonstrate the comprehensive list of applicable benefit(s), measurement grouping(s), metric(s) that may be realized as a result of the project.</p> <p>The Long List of Applicable Benefits is developed based on all knowledge acquired from interviews, research, validated workflow(s), project hypothesis, simulations, project success factors, KPI's, business roles, potential benefit(s), measurement grouping(s), metric(s), knowledge of data availability, site visit input and all previous engagement information.</p> <p>The Long List of Applicable Benefits shall demonstrate an understanding of the business case, policies, processes, business control points and potential points of failure related to the benefit(s), measurement grouping(s), metric(s), operational definition and applicability to the business case and business problem being solved. The contractor shall include all elements of a measurement plan to include an abridged rationale for each benefit(s), measurement grouping(s), metric(s) on the Long List of Applicable Benefits, importance to stakeholders, desired outcome, data source (if known), measurement grouping linkages to the business case and timeframe for data collection. The contractor shall insure that there is ample information in the Long List of Applicable benefits to perform a Performance Metric Rating (PMR) which follow in the next sub-phase.</p> <p>The contractor shall include any facts (data) that can be qualitatively and quantitatively measured. Foundational, functional and adoption benefits shall be identified and included that must be achieved before additional operational and strategic benefits are fully realized. The purpose of the document is to demonstrate identification all of the applicable benefit(s), measurement grouping(s), and metric(s) associated with the project,</p>		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	regardless of priority or measurement feasibility from a measurement plan perspective.				
1.4.3: Performance Metric Rating and Short List of Benefits	<p>The contractor shall validate the final benefit(s), measurement grouping(s), metric(s) that will be included in the Short List of Benefits based on the Performance Metric Rating (PMR). The contractor shall use the PMR to evaluate each of the benefits and performance measures and metrics within the Long List of Applicable Benefits in order to determine which are the most qualified benefit(s), measurement grouping(s) and metric(s) to include that will proving the value of the investment and be evaluated as part of the Product Effectiveness Measurement Services (PEMS) assessment.</p> <p>The contractor shall derive an overall Performance Measure Rating (PMR) for each performance measures by evaluating them based on (1) Benefit Applicability (2) Data availability (3) Data integrity (4) Data Measurability (qualitative or quantitative) (5) Data Collection Effort required based on their own knowledge and input from other domains, Product Effectiveness Measurement Services (PEMS) Program Manager, Product Effectiveness Director and SME's to determine which performance measures from the Long List of Applicable Benefit will be ultimately be evaluated as part of the assessment. The contractor shall refer to the Product Effectiveness Measurement Services (PEMS) Process and Procedures document PRM process to successfully complete this deliverable. The contractor shall understand the PMR process, operational definition of the metric being rated and expected measurement output from the PMR. PMR output will be reviewed and approved with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to finalization of the Short List of Benefits.</p> <p>The Short List of Benefits shall include the results of the PMR. The Short List of Benefits shall demonstrate inclusion of benefit(s), measurement grouping(s), metric(s) that have a confirmed applicability, data availability, data integrity, data measurability, data collection effort and alignment to the business case. The short list of Benefits shall demonstrate all of benefit(s), measurement grouping(s), metric(s) required to successfully and completely measure attainment of all intended benefits and project goals. The short list of Benefits shall include a rationale for inclusion of each benefit(s), measurement grouping(s), metric(s) on the list with supporting information to highlight the importance of why it is on the list and includes the linkages to the business value and the project goals</p>		Ea.		
1.4.4: Project Briefing	<p>The contractor shall develop a comprehensive Define Benefits Project Briefing that demonstrates a complete, well defined and comprehensive list of quantitative and qualitative measures and metrics and related data sources and updated as knowledge is acquired to insure the content is current. The purpose of the Define Benefits Project Briefing is to demonstrate a full understanding of project related policies, processes, business rules, business control points and potential points of failure and the benefit(s), measurement grouping(s), metric(s) related to them.</p> <p>The contractor shall demonstrate the logic and rationale for inclusion of all benefit(s), measurement grouping(s) and metric(s) including those that demonstrates variations between the as is and to be workflow and points of impact from a business role perspective to validate key points of measurement. Project Briefings shall include an Executive Summary that is no longer than (five) 5 pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front (BLUF) and sufficient analysis to be deemed credible.</p> <p><u>Checkpoint:</u> For the define benefits phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product</p>		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	Effectiveness Director shall be successfully completed prior to proceeding to the next phase.				
1.4.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable		Ea.		
1.4.6: Meeting Minutes	Minutes of all meetings related to the phase. . This is a “Roll Up” deliverable.		Ea.		
Sub-Phase 1.5 - Measurement Plan					
1.5.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.		Ea.		
1.5.2: Measurement Plan	<p>All quantitative and qualitative measure(s), measurement grouping(s), and metrics shall be described and demonstrate data definition(s), a detailed and comprehensive rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Measurement Plan shall include the following:</p> <ul style="list-style-type: none"> <u>Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources:</u> All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the comprehensive measurement plan. <u>Foundational Benefits:</u> Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated in detail. <u>Hypothesis:</u> The Measurement Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect. <u>Dependencies and Correlations:</u> benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis. <u>Simulated Examples:</u> Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case. <p><u>Checkpoint:</u> For the measurement plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.5.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable		Ea.		
1.5.4: Meeting Minutes	Minutes of all meetings related to the phase. . This is a “Roll Up” deliverable.		Ea.		
Sub-Phase 1.6 Data Collection and Analysis					
1.6.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
1.6.2: Project Analysis and Preliminary Findings Report	<p>The contractor shall populate all metrics described in the Measurement Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate a complete and comprehensive review of how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:</p> <ul style="list-style-type: none"> Foundational Benefits: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized. Hypothesis: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary. Dependencies and Correlations: The analysis shall include demonstration of dependencies and 	Large	Ea.		
		Med	Ea.		

Deliverable	Description or Reference		Qty.	Unit	Unit Price	Total Price
	<p>comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.</p> <ul style="list-style-type: none"><u>Simulated Examples</u>: The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary. <p>The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare the Project Analysis and Preliminary Findings Report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.</p> <ul style="list-style-type: none"><u>Checkpoint</u>: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.	Small		Ea.		
1.6.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Large		Ea.		
		Med		Ea.		
		Small		Ea.		
1.6.4: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	Large		Ea.		
		Med		Ea.		
		Small		Ea.		
Sub-Phase 1.7 –Reporting						
1.7.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.2-Plan Engagement-Engagement Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	Large		Ea.		
		Med		Ea.		
		Small		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.7.2: Report of Findings	<p>2 The contractor shall deliver a Report of Findings ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The Report of Findings shall also include and demonstrate any salient points that were identified in the Measurement Plan and Data Collection and Analysis Phase. When the Report of Findings is being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the Report of Findings.</p>	Large	Ea.		
	<p>Report of Findings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the Executive Summary, the Report of Findings shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p>	Med	Ea.		
	<p>Following the summary of findings, the Report of Findings body (target fifteen (15) pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the report. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.</p> <p>A separate one (1) page stand-alone document known as a Quick Facts shall accompany the Report of Findings and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.</p> <p><u>Checkpoint:</u> For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.</p>	Small	Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.7.3: Project Briefing	The contractor shall develop a comprehensive Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Project Briefing is serve as an executive summary which includes critical findings to demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or “no go. The Project Briefing shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
1.7.4: Data	All project raw data supporting the Report of Findings that have been gathered during the Product Effectiveness Measurement Services (PEMS) project (e.g., workbooks, interview notes, and survey data) shall be uploaded to the Product Effectiveness Share Point Site. This should also include any cleansed or normalized presentation of the data.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
1.7.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
1.7.6: Reporting-Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
Sub-Phase 1.8 – Post Implementation-Plan Engagement					
1.8.1: Project Plan	The contractor shall create a detailed mission focused baseline project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline. The baseline project plan baseline 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 entire engagement to successful completion. The project plan shall include an initial successful checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.		Ea.		
1.8.2: Charter and/or Addendum	The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.				
1.8.3: Steering Committee (SC) & User Working Group (UWG) Presentations	Steering Committee and User Working Group Presentations shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.		Ea.		
1.8.4: Business Value Report	<p>The contractor shall develop the Business Value report, in MS WORD format, with the purpose of developing and demonstrating a complete and thorough understanding of the problem statement, project related policies, processes, business rules, business control points and potential points of failure. This understanding shall be validated by the site visits(s) that occur in this phase. All information learned and validated at the site visit(s), shall be included in the Business Value report in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress.</p> <p>The contractor shall also demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met. Expected project benefits shall be clearly articulated along with measurement approaches, success factors and Key Performance Indicators (KPI's). The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall develop "what if" scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced.</p> <p>The Business Value report shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.</p> <p><u>Checkpoint:</u> For the measurement plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.8.5 Project Briefing	<p>A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare. The project briefing shall include all information needed to prepare for a site visit and shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. The project briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow description of the current and future state created with input from the steering committee and user working group, a description of what is working well and opportunities for improvement, project goals, current strategies to measure success, interview questions and site visit guidelines. The project briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). The contractor shall map site visits to an understanding of the business case and problem statements.</p> <p>Project briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible. The project briefing shall be reviewed with the BR Program Manger weekly updated weekly and will serve as the deliverable for the checkpoint at the end of the phase.</p>		Ea.		
1.8.6 Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable		Ea.		
1.8.7: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.		Ea.		
Sub-Phase 1.9 – Post Implementation-Measurement Plan					
1.9.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.		Ea.		
1.9.2: Measurement Plan Update	<p>The contractor shall update the Baseline/Initial Engagement Measurement Plan to reflect any added, deleted or updated benefit(s), measurement grouping(s) or metrics needed to successfully measure the business value impact of the change from the baseline/initial measurement in the post implementation measurement. The contractor shall verify assumptions, refine evaluation strategies, validate evaluation plans, and/or pilot questionnaire content. All quantitative and qualitative measure(s), measurement grouping(s), and metrics shall be described and demonstrate data definition(s), a detailed and comprehensive rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Measurement Plan shall include the following:</p> <ul style="list-style-type: none"> Integrate Benefit(s), Measurement Grouping(s) and Metric(s) 		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	<p>from All Sources: All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the comprehensive measurement plan.</p> <ul style="list-style-type: none"> • <u>Foundational Benefits</u>: Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated in detail. • <u>Hypothesis</u>: The Measurement Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect. • <u>Dependencies and Correlations</u>: benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis. • <u>Simulated Examples</u>: Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case. <p>Checkpoint: For the measurement plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>				
1.9.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable		Ea.		
1.9.4: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.		Ea.		
Sub-Phase 1.10 – Post Implementation-Data Collection & Analysis					
1.10.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	Large		Ea.	
		Med		Ea.	
		Small		Ea.	

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.10.2: Preliminary Findings Report	<p>The contractor shall populate all metrics described in the Measurement Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate a complete and comprehensive review of how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:</p> <ul style="list-style-type: none"><u>Foundational Benefits</u>: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.<u>Hypothesis</u>: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary.<u>Dependencies and Correlations</u>: The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.<u>Simulated Examples</u>: The analysis shall include input of actual data in the simulation models created in the Post Implementation Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary. <p>The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare this report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.</p> <p><u>Checkpoint</u>: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to</p>	Large	Ea.		
		Med	Ea.		
		Small	Ea.		

Deliverable	Description or Reference		Qty.	Unit	Unit Price	Total Price
	the next phase.					
1.10.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Large		Ea.		
		Med		Ea.		
		Small		Ea.		
1.10.4: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable	Large		Ea.		
		Med		Ea.		
		Small		Ea.		
Phase 1.11 – Post Implementation-Reporting						
1.11.1: Project Plan Update	The contractor shall update the baseline project plan created in <i>Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan</i> to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.	Large		Ea.		
		Med		Ea.		
		Small		Ea.		
1.11.2: Report of Findings	The contractor shall deliver a Report of Findings ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The Report of Findings shall also include and demonstrate any salient points that were identified in the Post Implementation Measurement Plan and Data Collection and Analysis Phase.	Large		Ea.		
	When Reports of Findings are being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points					

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	are captured, validated and messaging is accurately incorporated in the report	Med	Ea.		
	Report of Findings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)				
	Following the Executive Summary, the Report of Findings shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)	Small	Ea.		
	Following the summary of findings, the report body (target fifteen (15) pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)				
	Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the Report of Findings. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)				
	The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.				
	A separate one (1) page stand-alone document known as a Quick Facts shall accompany the Report of Findings and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.				
1.11.3 Project Briefing	2. The contractor shall develop a Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Project Briefing is to serve as an executive summary which includes critical findings to demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or “no go.”	Large	Ea.		
		Med	Ea.		
	The Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include				

Deliverable	Description or Reference		Qty.	Unit	Unit Price	Total Price
	demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. <u>Checkpoint:</u> For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.	Small		Ea.		
1.11.4: Data	All project raw data supporting the Report of Findings that have been gathered during the Product Effectiveness Measurement Services (PEMS) project (e.g., workbooks, interview notes, and survey data). This should also include any cleansed or normalized presentation of the data.	Large		Ea.		
		Med		Ea.		
		Small		Ea.		
1.11.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Large		Ea.		
		Med		Ea.		
		Small		Ea.		
1.11.6: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	Large		Ea.		
		Med		Ea.		
		Small		Ea.		
Sub-Phase 1.12 – Lessons Learned						
1.12.1: Project Plan Update	The contractor shall update the baseline project plan created in Sub-Phase 1.2-Plan Engagement-Engagement Project Plan or Sub-Phase 1.8-Post Implementation-Plan Engagement-Project Plan as applicable to accurately reflect any government approved changes or variances from the baseline project plan. The project plan shall include any updates needed to accurately reflect the work breakdown structure (WBS), deliverables, tasks, time needed to complete each task, task dependencies, and project schedule to include milestones to drive the all phases in the engagement to successful completion. The project plan shall be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.			Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
1.12.2 Report of Findings	<p>The contractor shall create a document that describes the comprehensive lessons learned from the Product Effectiveness Measurement Services (PEMS) engagement project, addressing each task and subtask of the project. Lessons Learned shall be gathered at each phase of an engagement as it progresses and be shared with the project stakeholders. This report will include retrospective accomplishments to demonstrate if goals for the evaluation were accomplished and recommendations for any improvements needed for future engagement successes. Lessons Learned shall include findings written in a concise format intended for internal use by Product Effectiveness, current and future engagement stakeholders and senior program leaders, top level agency leadership and members of Congress. All findings, lessons, naming conventions, and other data developed through all phases shall comply with conventions established to support use within the Product Effectiveness Knowledgebase.</p> <p>Lessons Learned shall include a self-assessment of the customer engagement, based on planned and realized value of the engagement to the Product Effectiveness customer. This deliverable shall demonstrate the objective and subjective value of the Product Effectiveness Measurement Services (PEMS) 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 Product Effectiveness Program.</p> <p><u>Checkpoint:</u> For the lessons learned phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.</p>		Ea.		
1.12.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable		Ea.		
1.12.4: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.		Ea.		
<u>Phase 2: Evaluation (Medium Rigor-Phase 2.1-2.8)</u> <u>Sub-Phase 2.1 – Evaluation-Engagement Plan</u>					
2.1.1: Project Plan	<p>The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the lifecycle of the project (6-8 weeks) as defined by Product Effectiveness. The project baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.</p>		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
2.1.2: Charter and/or Addendum	The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.		Ea.		
2.1.3: Steering Committee (SC) & User Working Group (UWG) Presentations	Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare with the goal of including all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Meeting presentations shall also be used to discuss project status, validate information and understandings, validate evaluation plans, and/or pilot questionnaire content, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.		Ea.		
2.1.4: Project Briefing	<p>A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare and include all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project.</p> <p>The project briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow descriptions, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. Workflows will be created from a business value perspective to include points of process variation (impacts), potential points of failure, applicable use cases and various applicable scenarios. Potential points of workflow failure will be identified. The contractor shall gather workflow information from existing work flows, user working groups, SME's, workflows created by other domains such as Functional Review (FR) and other applicable sources to inform the creation of the workflow. The contractor shall utilize the final workflow to validate the messaging and context for how measures relate to one another.</p> <p>The project briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). The project briefing shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. All information learned and validated at the site visit(s) shall be included in the report in a concise format. The contractor shall map site visits to an understanding of the business case and problem statements.</p>		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible. The briefing shall be reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager weekly updated weekly and will serve as the deliverable for the checkpoint at the end of the phase.				
2.1.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable		Ea.		
2.1.6: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.		Ea.		
Sub-Phase 2.2 – Evaluation: <i>Evaluation Plan</i>					
2.2.1: Evaluation Plan	<p>All <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project shall be described and demonstrate data definition(s), an abridged rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Evaluation Plan shall include the following:</p> <ul style="list-style-type: none"> • <u>Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources</u>: All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the evaluation plan if deemed critical to rapidly (6-8 weeks) measure project success. • <u>Foundational Benefits</u>: Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated. • <u>Hypothesis</u>: The Evaluation Plan also shall include and demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what 		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	<p>the data is predicted to validate, refute and/or reflect.</p> <ul style="list-style-type: none"> <u>Dependencies and Correlations</u>: benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis. <u>Simulated Examples</u>: Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case. <p><u>Checkpoint</u>: For the evaluation plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>				
2.2.2: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable		Ea.		
2.2.3: -Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.		Ea.		
Sub-Phase 2.3: Evaluation-Data Collection & Analysis					
2.3.1: Preliminary Findings Report	<p>The contractor shall populate all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project and described in the Evaluation Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:</p> <ul style="list-style-type: none"> <u>Foundational Benefits</u>: Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), 	Large		Ea.	
		Med		Ea.	

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	<p>metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized.</p> <ul style="list-style-type: none"> Hypothesis: The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as necessary. Dependencies and Correlations: The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness. Simulated Examples: The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary. <p>The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare this Preliminary Findings Report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.</p> <p>Checkpoint: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	Small	Ea.		
2.3.2: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
2.3.3: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
Sub-Phase 2.4 – Evaluation: <i>Final Report</i>					
2.4.1: <i>Final Report</i>	<p>The contractor shall deliver a <u>concise and rapid (6-8 weeks)</u> report to demonstrate critical findings in a format ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The report shall also include and demonstrate any salient points that were identified in the Evaluation Plan and Data Collection and Analysis Phase. When reports are being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the report.</p> <p>Final Reports shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the Executive Summary, the Final Report shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the summary of findings, the report body (target 15 pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the report. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)</p> <p>The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.</p> <p>A separate one (1) page stand-alone document known as a Quick Facts shall accompany the report and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.</p> <p><u>Checkpoint:</u> For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be</p>	Large		Ea.	
		Med		Ea.	
		Small		Ea.	

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	successfully completed.				
2.4.2: Project Briefing	The contractor shall develop a <u>concise</u> Evaluation Final Report Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Evaluation Final Report Project Briefing is to serve as an executive summary which includes <u>critical</u> findings to <u>concisely and rapidly</u> (6-8 weeks) demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or “no go.” Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
2.4.3: Data	All project raw data supporting the Report of Findings that have been gathered during the Product Effectiveness Measurement Services (PEMS) project (e.g., workbooks, interview notes, and survey data). This should also include any cleansed or normalized presentation of the data.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
2.4.4: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
2.4.5: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
Sub-Phase 2.5 – Evaluation: Post Implementation-Engagement Plan					

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
2.5.1: Project Plan	The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the lifecycle of the project (6-8 weeks) as defined by Product Effectiveness. The project baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.		Ea.		
2.5.2: Charter and/or Addendum	The contractor shall create a program charter and/or addendum in a timely manner that obtains agreement between Product Effectiveness Measurement Services (PEMS) and the project executive sponsor(s) to conduct a Product Effectiveness Measurement Services (PEMS) assessment. The project Charter focuses on the scope of work that would be accomplished via addendums to an initial overall engagement charter, at a minimum one (1) addendum would be created along with the project charter unless only one engagement would ever be needed under the identified scope, this is not the norm. The objective, problem statement, purpose, scope and approach shall be clearly written. The charter milestones shall be defined, reasonable and accurate and agreed upon by the stakeholder. Potential project risks and mitigation strategies along with project sponsors and stakeholders shall be identified at the correct organizational level to support project success and have authority to make decisions as approved by the government. The contractor shall insure that all required signatures have been obtained on the program charter and addendum prior to conducting any site visits.		Ea.		
2.5.3: Steering Committee and User Working Group Presentations	Steering Committee and User Working Group Presentations shall demonstrate critical thinking to support acquiring required project information focused on the business value of healthcare with the goal of updating the existing evaluation plan including all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project. Meeting presentations shall drive to an understanding of the current and future state, existing policies, processes, business roles, business control points, potential points of failure, a description of what is working well and opportunities for improvement, project goals, and current strategies to measure success. The contractor shall facilitate, schedule, and document all meetings with program staff and potential customers. Meeting presentations shall also be used to discuss project status, validate information and understandings, resolve key issues, and obtain strategic direction that will help guide the engagement towards a successful conclusion.		Ea.		
2.5.4: Project Briefing	<p>A presentation-style document shall be developed that provides an executive summary of the project, including stakeholder information, scope, goals, schedule, communications plan, data collection and analysis strategy and updated as knowledge is acquired to insure the content is current. The project briefing shall require critical thinking to support acquiring required information focused on the business value of healthcare and include all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project.</p> <p>The project briefing shall also include a comprehensive and detailed problem statement and hypothesis, use case scenarios, process description(s) and workflow descriptions, a description of what is working</p>		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	<p>well and opportunities for improvement, project goals, and current strategies to measure success. Workflows will be created from a business value perspective to include points of process variation (impacts), potential points of failure, applicable use cases and various applicable scenarios. Potential points of workflow failure will be identified. The contractor shall gather workflow information from existing work flows, user working groups, SME's, workflows created by other domains such as Functional Review (FR) and other applicable sources to inform the creation of the workflow. The contractor shall utilize the final workflow to validate the messaging and context for how measures relate to one another.</p> <p>The project briefing shall contain the information needed to initiate and guide discussions with SME's and the User Working Group (UWG). The project briefing shall drive to a complete and comprehensive plan for site visit planning and reporting of site visit execution information. All information learned and validated at the site visit(s) shall be included in the report in a concise format. The contractor shall map site visits to an understanding of the business case and problem statements.</p> <p>Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible. The briefing shall be reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager weekly updated weekly and will serve as the deliverable for the checkpoint at the end of the phase.</p>				
2.5.5: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a "Roll Up" deliverable		Ea.		
2.5.6: Meeting Minutes	Minutes of all meetings related to the phase. This is a "Roll Up" deliverable.		Ea.		
Sub-Phase 2.6 Evaluation-Post Implementation Evaluation Plan Update					
2.6.1: Evaluation Plan	<p>All project critical quantitative and qualitative measure(s), measurement grouping(s), and metrics to rapidly (6-8 weeks) evaluate success of the project shall be described and demonstrate data definition(s), an abridged rationale, sample size, data collection timeframe, data collection plan, known benchmarks, desired outcomes and validated data sources. The Evaluation Plan shall include the following:</p> <ul style="list-style-type: none"> <u>Integrate Benefit(s), Measurement Grouping(s) and Metric(s) from All Sources</u>: All benefit(s), measurement grouping(s), metric(s) from all domains supporting the engagement and all other sources (pre-existing balanced scorecards etc.) shall be demonstrated and included in the evaluation plan if deemed critical to rapidly (6-8 weeks) measure project success. <u>Foundational Benefits</u>: Foundational functional and adoption benefit(s), measurement grouping(s), metric(s) shall be identified and demonstrated that must be achieved before additional operational and strategic benefits are fully realized shall be demonstrated. <u>Hypothesis</u>: The Evaluation Plan also shall include and 		Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	<p>demonstrate a hypothesis that includes assumptions of what the data is predicted to reveal and potential outcome of what the data is predicted to validate, refute and/or reflect.</p> <ul style="list-style-type: none"> <u>Dependencies and Correlations:</u> benefit(s), measurement grouping(s), metric(s) interdependencies and comparative analysis opportunities shall be identified and demonstrated in preparation for data collection and analysis. <u>Simulated Examples:</u> Simulated examples using fictional data based on interdependent/correlated metric groupings shall be included to demonstrate potential outcomes and proof of applicability to the business case. <p><u>Checkpoint:</u> For the evaluation plan phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>				
2.6.2: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable		Ea.		
2.6.3: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.		Ea.		
Sub-Phase 2.7 Evaluation-Post Implementation-Data Collection and Analysis					
2.7.1: Preliminary Findings Report	<p>The contractor shall populate all <u>project critical</u> quantitative and qualitative measure(s), measurement grouping(s), and metrics to <u>rapidly</u> (6-8 weeks) evaluate success of the project and described in the Post Implementation Evaluation Plan with all values and results from all domains and sources prior to the analysis. Data shall be inclusive and traceable and collected in a consistent and standardized manner with standardized scales so the data can be consolidated in a consistent manner between projects. The contractor shall demonstrate how metrics roll up to their measurement groupings and benefits, data findings and the complete analysis of all data to identify correlations, interdependencies, causations, shifts, trends and any other pertinent findings to determine if project goals & benefits were met to include:</p> <ul style="list-style-type: none"> <u>Foundational Benefits:</u> Achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) shall be demonstrated through the analysis. Foundational, functional and adoption benefits shall be proven to be achieved before additional operational and strategic benefits are fully realized. <u>Hypothesis:</u> The analysis shall demonstrate a review of the hypothesis to determine if the assumptions of what the data analysis was predicted to reveal, refute and/or reflect is realized and if not, why not. Identify incorrect hypothesis and create a new one as 	Large		Ea.	
		Med		Ea.	

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	<p>necessary.</p> <ul style="list-style-type: none"><u>Dependencies and Correlations</u>: The analysis shall include demonstration of dependencies and comparative analysis based on actual data gathered from all Product Effectiveness domains and data sources. If an expected correlation or dependency is proven to not be valid once data is applied, then this is explained and demonstrated in the analysis report. The analysis requires considerable collaboration and joint analysis with government team members as well as with contract support from other firms supporting Product Effectiveness.<u>Simulated Examples</u>: The analysis shall include input of actual data in the simulation models created in the Measurement Plan phase to demonstrate and prove/disprove realization of higher level operational and strategic benefits. Identify incorrect simulations and create a new one as necessary. <p>The contractor shall make any necessary adjustments to benefit(s), measurement grouping(s) and metric(s), hypothesis, dependencies, correlations and simulations as needed based on the analysis. The contractor shall prepare this Preliminary Findings Report to be used to provide additional details related to the analysis to supplement and add additional evidence to the final report.</p> <p><u>Checkpoint</u>: For the data collection and analysis phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed prior to proceeding to the next phase.</p>	Small	Ea.		
2.7.2: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
2.7.3: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
Sub-Phase 2.8-Evaluation-Post Implementation-Final Report					

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
2.8.1: Final Report	The contractor shall deliver a <u>concise</u> and rapid (6-8 weeks) report to demonstrate critical findings in a format ready for presentation to senior program leaders, top level agency leadership and members of Congress that demonstrates a logical flow of analysis to show achievement/non-achievement of foundational, functional and adoption benefit(s), measurement grouping(s), metric(s) which must be achieved before additional operational and strategic benefits are fully realized. The report shall also include and demonstrate any salient points that were identified in the Post Implementation-Evaluation Plan and Post Implementation-Data Collection and Analysis Phase. When reports are being created with multiple data sources and domain inputs, there shall be collaboration demonstrated with all contributors to ensure that salient points are captured, validated and messaging is accurately incorporated in the report.	Large	Ea.		
	Post Implementation-Final Reports shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)	Med	Ea.		
	Following the Executive Summary, the Final Report shall include a condensed summary of findings table to include benefit(s), measurement grouping(s), metric(s) and their respective results (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)	Small	Ea.		
	Following the summary of findings, the report body (target 15 pages or less) should demonstrate if each benefit(s), measurement grouping(s), metric(s) goal has or has not been achieved in summary format and concluding with any findings and recommendations (see Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)				
	Following the body of the paper, an appendix (target five (5) pages or less) will be included to show all detailed benefit(s), measurement grouping(s), and metric results that support the findings describe in the report. (See Product Effectiveness Measurement Services (PEMS) Process and Procedures document for required content and style)				
	The Executive Summary shall include a brief description of the business case, the reason Product Effectiveness Measurement Services (PEMS) was engaged, the Product Effectiveness Measurement Services (PEMS) methodology, a benefit by benefit summary of results and a summary of findings and recommendations.				
	A separate one (1) page stand-alone document known as a Quick Facts shall accompany the report and include project overview, key findings and recommendations that is the equivalent of a condensed version of the executive summary.				
2.8.2: Project Briefing	The contractor shall develop a <u>concise</u> Post Implementation-Final Report Project Briefing that will be utilized to brief executives such as senior program leaders, top level agency leadership and members of Congress. The purpose of the Evaluation Final Report Project Briefing is to serve as an executive summary which includes <u>critical</u> findings to <u>concisely</u>	Large	Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	<p><u>and rapidly</u> (6-8 weeks) demonstrate the business value of the engagement investment and provide data based evidence, conclusions and to assist executive leaders in making decisions related to the investment such as “go” or ‘no go.</p> <p>Project Briefings shall include an Executive Summary that is no longer than five (5) pages/slides, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and include demonstration of the bottom line up front and enough of the analysis to be deemed credible. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem.</p> <p><u>Checkpoint:</u> For the reporting phase to be completed a checkpoint with the Product Effectiveness Measurement Services (PEMS) Program Manager, other domains involved in the engagement and Product Effectiveness Director shall be successfully completed.</p>	Med	Ea.		
		Small	Ea.		
2.8.3: Data	All project raw data supporting the Report of Findings that have been gathered during the Product Effectiveness Measurement Services (PEMS) project (e.g., workbooks, interview notes, and survey data). This should also include any cleansed or normalized presentation of the data.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
2.8.4: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
2.8.5: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
<u>Phase 3: Assessment (Low rigor-Phase 3.1)</u>					
Sub-Phase 3.1 – Assessment					
3.1.1: Project Plan	<p>The contractor shall create a detailed mission focused project plan in a timely manner 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), a scoping statement, planned deliverables and development of a project baseline and includes weekly updates over the brief (2-4 weeks) lifecycle of the project as defined by Product Effectiveness.</p> <p>The project plan baseline 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 Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director prior to any work starting in each phase of the engagement and will be</p>	Large	Ea.		
		Med	Ea.		
		Small	Ea.		

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
	updated regularly and reviewed with the Product Effectiveness Measurement Services (PEMS) Program Manager and Product Effectiveness Director weekly.				
3.1.2: Business Value Assessment Report	The contractor shall develop the Assessment-Business Value Assessment Report, in MS WORD format, with the purpose of developing and demonstrating an understanding of the effectiveness of the change being assessed. The Business Value Assessment Report shall include a basic, structured assessment plan that defines a measurement approach that may serve as a pre-cursor to a comprehensive measurement plan. A complete and thorough understanding of the problem statement, project related policies, processes, business rules, business control points and potential points of failure shall be demonstrated in the Business Value Assessment Report in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress. The contractor shall also demonstrate a framing of the business case, problem statement, what the project is expected to achieve and the process that will be followed to prove that the project goals have been met. Expected project benefits shall be clearly articulated in a basic, structured assessment plan that defines a measurement approach that may serve as a pre-cursor to a comprehensive measurement plan. The contractor shall describe the problem and what is trying to be resolved, the value of solving the problem, what benefit(s) is expected from the project goals and business case and how the business case can be enhanced to assist with resolution of the problem. The contractor shall develop “what if” scenarios to demonstrate possible outcomes related to the enhancement or change being implemented. The contractor shall demonstrate how the business case and expected benefit(s) can be enhanced. The Business Value Assessment Report shall include an Executive Summary that is no longer than five (5) pages, written in a concise format intended for presentation to senior program leaders, top level agency leadership and members of Congress and includes demonstration of the bottom line up front and enough of the analysis to be deemed credible.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
3.1.3: Meeting Agendas	Agendas of all meetings related to the phase. Described in the Product Effectiveness Measurement Services (PEMS) Process & Procedures document. This is a “Roll Up” deliverable	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
3.1.4: Meeting Minutes	Minutes of all meetings related to the phase. This is a “Roll Up” deliverable.	Large	Ea.		
		Med	Ea.		
		Small	Ea.		
Contract Program Management					
Product Effectiveness Measurement Services (PEMS) Contract Program Management encompasses program and project management activities to include weekly status reports, monthly accomplishment reports and additional Steering Committee and User Working Group meetings needed throughout the entire lifecycle of the contract. Program Management Products shall be uploaded to the PE Program SharePoint site.					

Deliverable	Description or Reference	Qty.	Unit	Unit Price	Total Price
Contract Program Management	Weekly Status Report (n=52): This deliverable is a weekly report of status of milestones, project plan timeline compliance, activates and accomplishments, and shall include actions, issues, and risks. This report shall serve as the agenda for the weekly Product Effectiveness Measurement Services status meeting. This report shall also contain a table of the awarded Task Phases and Deliverables listing their status (assigned/unassigned) as well as the customer engagement assigned. This report shall also contain Product Effectiveness Measurement Services Program Pipeline strategy and shall include recommendations for provision of PE services to current or potential engagement customers. Deliverable applies to all engagements in the contract.		Ea.		
	Monthly Accomplishments Report (n=12): This deliverable provides updates to the report of accomplishments for the engagement. Engagement accomplishments shall be reported as "track changes" updates to the PE Monthly Accomplishments 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 PE Monthly Accomplishments Report. Deliverable applies to all engagements in the contract.				
Post Engagement Business Value Report	Product Effectiveness Measurement Services (PEMS) Post Engagement Business Value Report (PEBVR) includes a post-engagement review of the impact and business value provided by Product Effectiveness (PE) to the enterprise (e.g., to what extent was Product Effectiveness (PE) able to achieve its goals and objectives for the evaluation?). This report will include a detailed and comprehensive account of engagement accomplishments, including how findings align with VA, VHA and Product Effectiveness (PE) strategic goals and objectives and the value of the findings in supporting strategic decisions.		Ea.		
Steering Committee and User Working	This deliverable provides for additional Steering Committee, User Working Group and Subject matter Expert meetings when needed as determined by Product Effectiveness (PE). The effort involved related to this deliverable would be for five (5) Steering Committee and User Working Group Meetings and related presentations (n=5), meeting		Ea.		
	Total				

5. Quality Control

Quality control (QC): The contractor shall develop and maintain an effective QC program to ensure services are performed in accordance with this PWS. The contractor shall develop and implement procedures to identify, prevent, and ensure non-recurrence of defective services. The contractor's QC program provides assurance that work complies with requirements of the individual contract. As a minimum, the contractor shall develop QC procedures addressing the areas identified in the "Performance Requirements Summary" defined in the TO. After acceptance of the QC plan, the contractor shall receive the CO's acceptance in writing of any proposed change to contractor's QC system.

5.1 Quality Assurance

The government shall evaluate the contractor's performance under this Contract in accordance with the Quality Assurance Surveillance Plan (QASP). This plan is primarily focused on what the government must do to ensure the contractor has performed in accordance with the performance standards. It defines how the performance standards

will be applied, the frequency of surveillance, and the minimum acceptable defect rates. Quality standards and Quality Assurance Surveillance Plan (QASP) are tailored for this project and are outlined in the table below.

6. Security Controls Compliance Testing

On a periodic basis, VA, including the OIG, reserves the right to evaluate any or all of the security controls and privacy practices implemented by the Contractor under the clauses contained within this Blanket Purchase Agreement. With 10 working days' notice, at the request of the Government, the Contractor must fully cooperate and assist in a Government-sponsored security controls assessment at each location wherein VA information is processed or stored, or information systems are developed, operated, maintained, or used on behalf of VA, including those initiated by the OIG. The Government may conduct a security control assessment on shorter notice (to include unannounced assessments) as determined by VA in the event of a security incident or at any other time.

7. Training

1. All Contractor employees and Sub-contractor employees requiring access to VA information and VA information systems shall complete the following before being granted access to VA information and its systems:
 - a. Sign and acknowledge (either manually or electronically) understanding of and responsibilities for compliance with the *Contractor Rules of Behavior*, Appendix E relating to access to VA information and information systems;
 - b. Successfully complete the *VA Cyber Security Awareness and Rules of Behavior* training and annually complete required security training;
2. The Contractor shall provide to the CO and/or the COR a copy of the training certificates and certification of signing the Contractor Rules of Behavior for each applicable employee within 1 week of the initiation of the contract and annually thereafter, as required.
3. Failure to complete the mandatory annual training and sign the Rules of Behavior annually, within the timeframe required, is grounds for suspension or termination of all physical or electronic access privileges and removal from work on the contract until such time as the training and documents are complete.

8. Government Furnished Property and Facilities

The Contractor shall ensure adequate Local Area Network (LAN)/Internet data information and system security in accordance with VA standard operating procedures and standard Blanket Purchase Agreement and TO language, conditions, laws and regulations. The Contractor's firewall and web server shall meet or exceed the Government minimum requirements for security. All government data shall be protected behind an approved

firewall. Any security violations or attempted violations shall be reported to the VA project manager and VA ISO as soon as possible. The Contractor shall follow all applicable VA policies and procedures governing information security, especially those that pertain to certification and accreditation.

All Contractor employees under this Contract are required to complete the VA's online Cyber Security and Privacy Awareness Training course(s) annually. Contractors must provide signed certification of completion to the CO during each year of the Blanket Purchase Agreement. This requirement is in addition to any other training that may be imposed on the Contractor, the CO or other VA organizations.

All persons requiring access to VA information systems shall sign a System Rules of Behavior Notice for those systems before being given access, and annually thereafter. A completed VA form 9957 must be submitted for each employee requiring access to a VA system.

All computer systems residing on VA premises or under VA control will be administered by VA System Administration staff. Contractor personnel shall be granted only the least access required to accomplish activities associated with this contract.

All employees of the Contractor must sign a non-disclosure agreement regarding release of data and information pertaining to the Contract and publication of data and information of material related to the project.

The Government will provide the Contractor the following:

1. Access rights to the VA Network,
2. Access to VA Email,
3. VPN access to VA Network or, if not feasible, access to the VA Network via the facility in Salt Lake City, Utah.
4. Access rights to any applications and data stores requisite in performing the analyses outlined above.
5. In the instance that specific government required software cannot be sufficiently accessed via the VA Citrix Gateway, the government will provide GFE to ensure work can be accomplished and delivered in accordance with contractual requirements.

9. Government Furnished Information

VA will retain all rights and privileges, including those of patent and copy, to all Government furnished data. The Contractor shall neither retain nor reproduce for private or commercial use any data or other materials furnished under this contract. The Contractor agrees not to assert any rights at common law or in equity or establish any claim to statutory copyright in such data. These rights are not exclusive and are in addition to any other rights and remedies to which the Government is otherwise entitled elsewhere in this Contract.

The parties agree that no communications or interactions between VA and the contractor, its officers, employees, or agents may be recorded without prior written consent of all participants of the communication.

10. Contractor Personnel Security Requirements

The following security requirements must be addressed regarding Contractor-supplied equipment: Contractor-supplied equipment, PCs of all types, equipment with hard drives, and so forth for contract services must meet all security requirements that apply to GFE and Government Owned Equipment (GOE). Security Requirements include: a) VA Approved Encryption Software must be installed on all laptops or mobile devices before placed into operation, b) Bluetooth equipped devices are prohibited within the VA; Bluetooth must be permanently disabled or removed from the device, and c) Equipment must meet all sanitization requirements and procedures before disposal. The COR, CO, PM and the ISO must be notified and verify all security requirements have been adhered to.

1. Information made available to the Contractor/Sub-Contractor by VA for the performance or administration of the TO or information developed by the Contractor/Sub-Contractor in performance or administration of the TO shall be used only for those purposes and shall not be used in any other way without the prior written agreement of the VA. This clause expressly limits the Contractor/Sub-Contractor's rights to use data as described in Rights in Data - General, FAR 52.227-14(d) (1).
2. VA information should not be co-mingled, if possible, with any other data on the Contractors/Sub-Contractor's information systems or media storage systems in order to ensure VA requirements related to data protection and media sanitization can be met. If co-mingling must be allowed to meet the requirements of the business need, the Contractor must ensure that VA's information is returned to the VA or destroyed in accordance with VA's sanitization requirements. VA reserves the right to conduct on-site inspections of Contractor and Sub-Contractor IT resources to ensure data security controls, separation of data and job duties, and destruction/media sanitization procedures are in compliance with VA directive requirements.
3. Prior to termination or completion of the TO, the Contractor/Sub-Contractor must not destroy information received from VA, or gathered/created by the Contractor in the course of performing the TO without prior written approval by the VA. Any data destruction done on behalf of VA by a Contractor/Sub-Contractor must be done in accordance with NARA requirements as outlined in VA Directive 6300, "Records and Information Management" and its Handbook 6300.1 Records Management Procedures, applicable VA Records Control Schedules, and the VA Handbook 6500.1, Electronic Media Sanitization. Self-certification by the Contractor that the data destruction requirements above have been met must be sent to the VA CO within 30 days of termination of the TO.

4. The Contractor/Sub-Contractor must receive, gather, store, back up, maintain, use, disclose and dispose of VA information only in compliance with the terms of the TO and applicable Federal and VA information confidentiality and security laws, regulations and policies. If Federal or VA information confidentiality and security laws, regulations and policies become applicable to the VA information or information systems after execution of the TO, or if NIST issues or updates applicable FIPS or SP after execution of this TO, the parties agree to negotiate in good faith to implement the information confidentiality and security laws, regulations and policies in this TO.
5. The Contractor/Sub-Contractor shall not make copies of VA information except as authorized and necessary to perform the terms of the agreement or to preserve electronic information stored on Contractor/Sub-Contractor electronic storage media for restoration in case any electronic equipment or data used by the Contractor/Sub-Contractor needs to be restored to an operating state. If copies are made for restoration purposes, after the restoration is complete, the copies must be appropriately destroyed.
6. If VA determines that the Contractor has violated any of the information confidentiality, privacy and security provisions of the TO, it shall be sufficient grounds for VA to withhold payment to the Contractor or third party terminate the TO for default or terminate for cause under FAR part 12.
7. The Contractor/Sub-Contractor must store, transport or transmit VA sensitive information in an encrypted form using VA-approved encryption tools that are, at a minimum, FIPS 140-2 validated.
8. The Contractor/Sub-Contractor's firewall and Web services security controls, if applicable, shall meet or exceed VA's minimum requirements. VA Configuration Guidelines are available upon request.
9. Except for uses and disclosures of VA information authorized by this TO for performance of the TO, the Contractor/Sub-Contractor may use and disclose VA information only in two other situations: (i) in response to a qualifying order of a court of competent jurisdiction, or (ii) with VA's prior written approval. The Contractor/Sub-Contractor must refer all requests for, demands for production of, or inquiries about VA information and information systems to the VA CO for response.
10. Notwithstanding the provision above, the Contractor/Sub-Contractor shall not release VA records protected by Title 38 U.S.C. 5705, confidentiality of medical quality assurance records and/or Title 38 U.S.C. 7332, confidentiality of certain health records pertaining to drug addiction, sickle cell anemia, alcoholism or alcohol abuse, or infection with human immunodeficiency virus. If the Contractor/Sub-Contractor is in receipt of a court order or other requests for the above mentioned information, that Contractor/Sub-Contractor shall immediately refer such court orders or other requests to the VA CO for response.

11. For service that involves the storage, generating, transmitting, or exchanging of VA sensitive information but does not require C&A or a MOU-ISA for system interconnection, the Contractor/Sub-Contractor must complete a CSCA on a yearly basis and provide it to the COR.

12. Position Sensitivity and Background Investigation - The position sensitivity and the level of background investigation commensurate with the required level of access is:

- ☒ Low/National Agency Check with Written Inquiries (NACI)
- ☐ Moderate/Minimum Background Investigation (MBI)
- ☐ High/Background Investigation

Position Sensitivity	Background Investigation (in accordance with 7010 Handbook Appendix A)
Low	A NACI is conducted by the Office of Personnel Management (OPM) and covers a five-year period. It consists of a review of records contained in the OPM Security Investigations Index (SII) and the DoD Defense Central Investigations Index (DCII), Federal Bureau of Investigation (FBI) name check, FBI fingerprint check, and written inquiries to previous employers and references listed on the application for employment. In VA it is used for non-sensitive or Low Risk positions.
Moderate	A MBI is conducted by OPM and covers a five-year period. It consists of a review of National Agency Check records [OPM (SII), DOD DCII, FBI name check, and a FBI fingerprint check], a credit report covering a period of five years; written inquiries to previous employers, references listed on the application for employment; an interview with the subject, spouse, neighbors, supervisor, and co-workers; and a verification of the educational degree.
High	Background Investigation. A background investigation is conducted by OPM and covers a 10 year period. It consists of a review of National Agency Check records [OPM SII, DOD DCII, FBI name check, and a FBI fingerprint check report], a credit report covering a period of 10 years, written inquiries to previous employers and references listed on the application for employment; an interview with the subject, spouse, neighbors, supervisor, and co-workers; and a verification of the educational degree.