VA ELECTRONIC HEALTH RECORD MODERNIZATION (EHRM) SYSTEM
PERFORMANCE WORK STATEMENT (PWS)
DEPARTMENT OF VETERANS AFFAIRS

EHRM Program Executive Office

EHRM Project Management, Planning, Strategy and Pre-IOC Build

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Contents

1.0 BACKGROUND

The mission of the Department of Veterans Affairs (VA) is to provide benefits and services to Veterans of the United States. In meeting these goals, VA strives to provide high quality, effective, and efficient Information Technology (IT) services to those responsible for providing care to the Veterans at the point-of-care as well as throughout all the points of the Veterans' health care in an effective, timely and compassionate manner. VA depends on Information Management/Information Technology (IM/IT) systems to meet mission goals.

On June 1, 2017, the Secretary of the VA signed a Determination and Findings that, through a public interest exception, permitted the sole source procurement of the Cerner Corporation's (Cerner) Electronic Health Record (EHR) system being deployed by the Department of Defense (DoD) as well as related services for deployment and transition across the VA enterprise in a manner that meets VA needs. Procurement of a single common system across VA and DoD shall achieve VA's goal of seamless care for Veterans by facilitating the transition of active duty military members to VA and improving their timely access to the highest quality of care.

Under this task order, Cerner shall provide project management, planning, strategy, and pre-Initial Operating Capability (IOC) build support.

For purposes of this Performance Work Statement (PWS), the VA EHR solution will be referred to as the VA Electronic Health Record Modernization (EHRM) System.

2.0 APPLICABLE DOCUMENTS

The documents in Paragraph 3.0 in the EHRM Basic PWS apply to the performance of this effort, there are no additional referenced documents.

3.0 SCOPE OF WORK

The Contractor shall provide project management and planning support services for the VA EHRM solution. These services include EHRM project management, EHRM enterprise management, EHRM functional management, EHRM technical management, EHRM enterprise design and build activities as well as pre-IOC infrastructure build and testing.

3.1 APPLICABILITY

This Task Order (TO) effort PWS is within the scope of paragraph 5.1 Project Management and 5.2 EHRM System of the EHRM Basic PWS.

3.2 ORDER TYPE

The effort shall be proposed on a Firm Fixed Price (FFP) basis.

4.0   PERFORMANCE DETAILS

4.1   PERFORMANCE PERIOD

The period of performance (PoP) shall be 12 months from the date of award, with one 12-month option period.

4.2   PLACE OF PERFORMANCE

Efforts under this TO shall be performed both in Contractor facilities, as well as VA facilities. Program meetings may also be held at VA Central Office, some of which may require in person attendance. Project management activities that occur at the enterprise level shall be performed at Contractor facilities.

4.3   TRAVEL OR SPECIAL REQUIREMENTS

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

The total estimated number of trips for this effort shall be proposed by the contractor. Anticipated locations include, but are not limited, Kansas City, MO; Washington, DC; Veterans Service Integrated Network (VISN) 20 IOC site locations. The Contractor shall review travel under this TO on a quarterly basis. Based on this quarterly review, the Contractor shall inform VA of project risks related to travel.

4.4   CONTRACT MANAGEMENT

All requirements of Section 9.0 of the EHRM Basic PWS apply to this effort. This TO shall be addressed in the Contractor's Monthly Progress Report as set forth in the EHRM Basic contract.

4.5   GOVERNMENT FURNISHED PROPERTY

The Government has determined that remote access solutions involving Citrix Access Gateway (CAG) have proven to be an unsatisfactory access method to complete the tasks on this specific TO. The Government also understands that GFE is limited to Contractors requiring direct access to the network to: access development environments; install, configure and run TRM-approved software and tools (e.g., Oracle, Fortify, Eclipse, SoapUI, WebLogic, LoadRunner, etc.); upload/download/ manipulate code, run scripts, apply patches, etc.; configure and change system settings; check logs, troubleshoot/debug, and test/QA.

Based on the Government assessment of remote access solutions and the requirements of this TO, the Government estimates that the following GFE will be required by this TO:

1. 50 of standard laptops

The Government will not provide IT accessories including but not limited to Mobile Wi-Fi hotspots/wireless access points, additional or specialized keyboards or mice, laptop bags, extra charging cables, extra PIV readers, peripheral devices, additional RAM, etc. The Contractor is responsible for providing these types of IT accessories in support of the TO as necessary and any VA installation required for these IT accessories shall be coordinated with the COR.

4.6   SECURITY AND PRIVACY

All requirements in Section 7.0 of the EHRM Basic PWS apply to this effort.

It has been determined that protected health information may be disclosed or accessed and a signed Business Associate Agreement (BAA) shall be required. The Contractor shall provide and adhere to the requirements of their existing BAA, referenced in Section D of the Request for Task Execution Plan (RTEP) and shall comply with VA Directive 6066.

4.6.1 POSITION/TASK RISK DESIGNATION LEVEL(S)

The position sensitivity and the level of background investigation commensurate with the required level of access for the following tasks within the PWS are:

Position Sensitivity and Background Investigation Requirements by Task

Task Number	Tier1 / Low Risk	Tier 2 / Moderate Risk	Tier 4 / High Risk
5.1	☐	☒	☐
5.2	☐	☒	☐
5.3	☐	☒	☐
5.4	☐	☒	☐
5.5	☐	☒	☐
5.6	☐	☒	☐
5.7	☐	☒	☐

The Tasks identified above and the resulting Position Sensitivity and Background Investigation requirements identify, in effect, the Background Investigation requirements for Contractor individuals, based upon the tasks the particular Contractor individual will be working. The submitted Contractor Staff Roster must indicate the required Background Investigation Level for each Contractor individual based upon the tasks the Contractor individual will be working, in accordance with their submitted proposal.

5.0   SPECIFIC TASKS AND DELIVERABLES

The Contractor shall perform the following:

5.1   PROJECT MANAGEMENT

5.1.1 CONTRACTOR PROJECT MANAGEMENT PLAN

The Contractor shall deliver a Contractor Project Management Plan (CPMP) that lays out the Contractor's approach, timeline and tools to be used in execution of this TO effort. The CPMP should take the form of both a narrative and graphic format that displays the schedule, milestones, risks and resource support. The CPMP shall also include how the Contractor shall coordinate and execute planned, routine, and ad hoc data collection reporting requests as identified within the PWS. The initial baseline CPMP shall be concurred upon and updated in accordance with Section B of the TO. The Contractor shall update and maintain the VA Program Manager (PM) approved CPMP throughout the PoP.

Deliverable:

    A. Contractor Project Management Plan

5.1.2 REPORTING REQUIREMENTS

The Contractor shall provide a Monthly Progress Report in accordance with Section 9.6.1.1 of the EHRM Basic PWS.

The Contractor shall participate in quarterly Program Management Reviews (PMRs) with VA.

Additionally, requirements under this TO may require working with the EHRM Program Management Office support contractor team to provide inputs into program-level reporting and performance analysis/monitoring requirements. As a result, the Contractor shall support up to 20 named program-level reports and/or performance analysis/monitoring requirements per year. The Contractor shall support and respond to internal and external data calls and requests from third parties to include but not limited to Congress, unions, VSO etc. as it relates to EHRM. Additionally, the Contractor shall coordinate external communications with VA prior to release. Program-level report activities shall be included in the Monthly Progress Report.

Deliverable:

    A. Monthly Progress Report
    B. Program-Level Reports

5.1.3 TECHNICAL KICKOFF MEETING

The Contractor shall hold a technical kickoff meeting within ten days after TO award. The Contractor shall present, for review and approval by the Government, a Contractor Project Management Plan that includes the details of the intended approach, work plan, and project schedule for each effort. The Contractor shall review the roles, goals and objectives, and to discuss technical requirements, administrative matters, GFP associated with Contractor performance for the IDIQ. The Contractor shall specify dates, locations (can be virtual), agenda (shall be provided to all attendees at least five calendar days prior to the meeting), and meeting minutes (shall be provided to all attendees within three calendar days after the meeting). The Contractor shall invite the Contracting Officer (CO), Contract Specialist (CS), COR, and the VA PM.

5.2 EHRM ENTERPRISE MANAGEMENT SUPPORT

The Contractor shall provide and implement a Delivery Management Organization to manage the execution of the EHRM Program. The Contractor shall provide the leadership, processes, tools, and deliverables required for Project Management, Functional Management, and Technical Management.

5.2.1 EHRM PROJECT MANAGEMENT

The Contractor shall provide project management support to accomplish the vendor-side managerial, logistical, and integration required to implement and sustain the EHRM. The Contractor shall support project management activities across multiple TOs to implement and sustain the EHRM solution at the IOC sites identified in Section 4.2, and any other sites included in subsequent deployment task orders that are activated during performance of this effort. The Contractor shall identify an individual as the primary contact point for all project issues/concerns/status. The Contractor shall follow VA approved Project Management guidance, in accordance with VIP for Major Programs associated with this TO.

5.2.1.1 SCHEDULE MANAGEMENT

The Contractor shall create an Integrated Master Schedule (IMS) that depicts the implementation and deployment of the EHRM solution. The Contractor shall create, maintain, analyze, and report integrated schedules, as defined below:

   a. The IMS shall identify and include all applicable project milestones for identifying and documenting discrete events necessary to complete the project, definition of relationship (dependency) between and among these events, determination of the expected duration of each event, resources required for each, and creation of a schedule that depicts this information as a cohesive whole.

b. The IMS shall identify and track sites associated with the EHRM deployment.
c. The Contractor shall ensure that a fully resource-loaded and baselined schedule in Microsoft Project is in place within 20 business days of receiving baselined requirements.
d. The Contractor shall maintain the schedule, generating Bi-Weekly Schedule Reports containing, at a minimum, the planned versus actual program/project performance and updated critical path information for the project. The reports shall be provided to, and accepted by the COR.
e. The Contractor shall follow the established Change Control Process Plan to address any schedule variance. The Contractor shall adhere to VA guidance for changing dates related to baselined dates.
f. The Contractor shall deliver a detail-level schedule, critical path depiction, and what-if analysis, with breakouts of subsections for individual groups/teams. When data are provided/entered that create overall critical path slippage, the Contractor shall notify the VA PM within one business day, by email and phone.

Deliverables:
A. Integrated Master Schedule
B. Bi-Weekly Schedule Reports

5.2.1.2 RESOURCE MANAGEMENT

The Contractor shall manage the onboarding of its staff after TO award. The Contractor's resource management activities shall include the steps to allow Contractor resources, if required, to obtain a VA network and email account, complete training, initiate background investigations, and gain physical and logical access, which may include elevated privileges to the necessary development and test environments for the various systems to be enhanced. The Contractor shall provide the names of the resources that will support the project at the TO Technical Kick-off Meeting and shall also be documented and updated in the CPMP.

The Contractor shall designate a single Contractor Onboarding and Resource POC to track the onboarding status of all Contractor personnel. The Contractor Onboarding POC shall be responsible for accurate and timely submission of all required VA onboarding paperwork to the COR. The Contractor shall be responsible for tracking the status of all their staff's onboarding activities and report the status at the staff level during onboarding status meetings. The Contractor shall provide a weekly Onboarding Status Report for any staff with outstanding onboarding requests for review by the COR and VA Project Manager (PjM).

The Contractor shall provide a Resource Management Plan that includes a timeline for onboarding, compliance, provisioning, and access for expert resources. The completion dates for the following milestones shall be included for each staff member:

a. Completion of mandatory onboarding paperwork
b. Fingerprints submitted (if applicable)

c. Background investigation initiated
d. Background investigation completed
e. Network Access received
f. Submit e-Pass (for elevated privileges if applicable)
g. GFE Issued (as applicable) with elevated privileges (if applicable)
h. CAG/VPN access granted
i. Contractor Off-boarding Date

Deliverables:
> A. Onboarding Status Report
> B. Resource Management Plan

5.2.1.3 RISK MANAGEMENT

The Contractor shall adhere to VA-defined risk and issue management processes and report risks and issues to VA for all EHRM activities.

The Contractor shall create a project Risk Management Plan (RMP) to identify their approach to identifying and categorizing project risks, proposing mitigations, and tracking status on risk resolution. The Contractor shall provide a presentation to VA of updated risk responses and actions to include mitigation strategies at each PMR.

The Contractor shall:
a. Report, monitor, manage and mitigate risks for each respective deployment site.
b. Enter and update risks per VA's direction.
c. Assess the status of and report on its risks on a weekly basis to VA for inclusion in the Program Risk Management Registry, maintained by EHRM PMO Contractor. When new risks occur, which could impact the configuration, testing and deployment schedule, the Contractor shall notify the COR and VA PM via email within 24 hours. Email subject line shall read "EHRM {Site Deployment Location} Risk Alert Notification."
d. Provide the COR and VA PM a weekly Risk Management Status Report

Deliverables:
A. Risk Management Plan
B. Weekly Risk Management Status Report

5.2.1.4 QUALITY MANAGEMENT PLANNING

The Contractor shall perform three major tasks as part of the quality planning process:

a. Define customer quality objectives and measures specific to IOC;
> i. The Contractor shall define the operational processes required to fulfill the quality objectives. For each phase, the Contractor will 1) produce an

auditable checklist of necessary, value-added activities that assert the quality of a given service and/or solution, 2) help baseline progress on work items, cost, and schedule and 3) ensure there is a common understanding of completion by those involved on a specific work product and/or service.

ii.   Meeting the criteria defined in the checklist implies that work was delivered on time, within budget, and in compliance with technical requirements.

b. Determine how quality objectives and measures will be met and exceeded, and define the performance metrics (i.e. key performance indicators) and associated thresholds that can be used to forecast, monitor, and evaluate progress against cost, schedule and technical requirement compliance and realization, and ultimately quality objective achievement;

i.   The Contractor shall use metrics to continuously forecast, track and assess progress against cost, schedule, and technical requirements compliance and realization.

c. Define Customer Quality Objectives/Measures.

i.   The Contractor shall hold a series of requirements meetings after IOC Task Order kick-off to identify and capture this understanding and document it in our Quality Management Plan as quality objectives.

The Contractor shall incorporate all outcomes from this task into a Quality Management Plan that will be updated monthly to maintain a current view of quality management activities.

Deliverable:

A. Quality Management Plan

5.2.1.5 GOVERNANCE

The Contractor shall participate in and provide recommendations in an advisory role to the Joint Governance Board with membership comprising of DoD, VA, Cerner members. This joint board will address data governance, disaster recovery, workflow development, change control, security requirements and implementation decisions in addition to other areas requiring concurrence as recommended by the Contractor.

The Contractor shall propose an Innovation Board Charter and facilitate the establishment of joint VA/Cerner Innovation governance board.

The Contractor shall support and participate in the VA Governance process and applicable working groups as defined by the VA and recommended by the Contractor at the VA EHRM Executive level, PjM Level, Functional Management level, and Technical Management level as a subject matter expert advisor. The Contractor shall attend governance board meetings as a non-voting advisor.

The Contractor shall keep in communication with VA so that issues that arise are transparent to both parties to prevent escalation of outstanding issues. The Contractor shall participate with designated VA personnel at any periodic or intermittent project/program or governance-related meetings once established, (e.g., monthly EHRM Steering Committee, Governance Integration Board, Functional Governance Board, Technical Governance Board, VA/DOD Joint Work Stream Coordination (WSC) Sync, Joint Technical Governance Board and Joint Functional Governance Board) and present recommendations and/or white papers for joint review and approval.

Deliverables:
    A.   Proposed Innovation Board Charter

5.2.1.6 PROJECT COMMUNICATIONS MANAGEMENT

The Contractor shall deliver a Project Level Communications Plan as part of the CPMP to outline the communications required to manage the overall EHRM project. The Contractor shall coordinate with the PMO Contract support staff and include as part of the Project Level Communications Plan an approach to communicating action items and issues that require immediate response.

Deliverables:
    A. Project Level Communications Plan

5.3   EHRM FUNCTIONAL MANAGEMENT PLANNING AND OVERSIGHT

The Contractor shall provide a Functional Management Organization (FMO) that develops the framework and begins launch of change management, functional requirement management, product management, deployment management planning and develops / launches the value management and communication strategy. The functions outlined shall work in a cohesive manner to approach the VA with a consolidated strategy to functional management that:

    a. Develops the change management strategy
    b. Baselines the VHA's clinical priorities vs. the Contractor's solution
    c. Leads requirements elaboration sessions to detail critical changes to the clinical workflow
    d. Develops communications and training strategies
    e. Evaluates operational readiness across facilities

5.3.1 ORGANIZATIONAL CHANGE MANAGEMENT

The Contractor shall design, develop and implement a comprehensive Enterprise-wide EHRM organizational change management strategy and plan based on the results of

initial analyses performed. This plan will include insight and coordination of all PMO contract activities during the individual site assessment visits.

5.3.2 CHANGE MANAGEMENT STRATEGY

The change management strategy is a living document that will reflect the dynamic nature and complex organizational structure of the VA. The plan will include ongoing updates to the national plan and templates reflective of a large workforce facing multiple transformations. The Contractor shall develop an EHRM Change Management Strategy to define a systematic and scalable approach for integrating the people side of the change, concurrent with all other EHRM implementation activities and other VA Modernization initiatives. Within this EHRM Change Management Strategy, the Contractor shall identify success measures, risks and mitigation approaches to minimize stakeholder disruption and resistance, while maximizing adoption and outcomes. In addition, the Contractor shall develop the EHRM Change Management Strategy based on best practices and lessons learned from EHRM implementations and VA/VHA deployments, to achieve VAs objectives and the cross-cutting impact that it has on internal and external stakeholders.

The EHRM Change Management Strategy shall clearly identify an end-state vision for the change, the drivers needed to achieve understanding and acceptance of the vision, and performance measures to assess the progress towards achievement of the intended objectives. Within the Change Management Strategy, the Contractor shall define the framework for transformation, and provide guidance and support in helping VA prepare for the EHRM implementation by establishing urgency and scope, creating and communicating the vision, driving commitment and empowerment.

As a result, the EHRM Change Management Strategy shall allow VA leaders to be aligned around a conceptual approach for how the EHRM will be operationalized within VA, and can communicate clear, compelling, and consistent messages to VA staff about the change. In order to ensure that the work in this Task Order is aligned with the deliverables from other potential VA contractors, both the VA and the Contractor will mutually agree on the scope of work to be performed relative to EHRM Change Management prior to VA Execution of other work.

As part of the EHRM Change Management Strategy, the Contractor shall create an EHRM Workforce Analysis to identify impacts to organizations and roles and mitigation strategies The EHRM Workforce Impact Analysis shall include the below, but not limited to:
   a. EHRM Human Capital Plan to incorporate the change, overall transformation, and the impacts to the make-up of the organization (number of people and skillsets). This identifies factors that will need to be considered such as recruiting strategies, hiring authorities, types of resources, re-skilling, retention, and turnover strategies to prepare the organization long-term with the right people with the right knowledge, skills, and abilities.

b. EHRM Role Analysis Plan to identify the change, overall transformation and impact to the existing roles and responsibility as a result of future state workflows. The Role Analysis will inform the human capital plan, organizational readiness, training needs, operational processes and policies that may need modification.

The EHRM change management strategy shall include:

a. VISN and VAMC Support Strategy
b. Standard Operating Procedure Management
c. Clinical Content and Process Standardization Approach
d. Initial Process Standardization Activity Map
e. Change Management Playbook
f. End-State Vision
g. VA WAG Operational Strategy
h. Executive Alignment Event Reporting Strategy
i. Proposed VA change management governance model
j. Change management risk and mitigation log
k. Value Realization strategy and plan
l. EHRM workforce strategy
m.   National Transformation plan support including:
   1. National Transformation Charter
   2. Program Management Plan
   3. Operational Policies and Procedures
   4. Roles and Responsibilities Profiles at the national, regional, and local level
   5. Onboarding Plan
   6. Project Plan
   7. Program Kickoff
   8. Program Templates
   9. Organizational Charts
   10. Conflict Resolution

Deliverable:

A. Change Management Strategy

5.3.3 EHRM TRAINING STRATEGY

As part of the EHRM Change Management Strategy, the Contractor shall create an EHRM Training Strategy to integrate training of organization, process, and technology changes specific to performing work. The EHRM Training Strategy shall identify approaches (e.g., Super Users, Train-the-Trainer, Instructor-led Training, On-the-Job Support), roles and responsibilities needed to develop and execute on training, as well as preliminary scheduling, risks, and mitigations.

The EHRM Training Strategy shall include:

a. Identification of the training format to be used, e.g. traditional instructor led, blended learning, classroom, train-the-trainer, Computer Based Training
b. A training structure to be used, e.g., optimal class size, number of instructors, site resource requirements
c. A training plan based on best practices for each role/skill/knowledge base
d. Identification of curriculum to be developed, based on best practices for adult learning, to meet each of the sites skills, knowledge base, user roles
e. Process for determination of training schedules to meet VA's availability in accordance with Contractor's best practices
f. Number of trainers required for each training classes per deployment site
g. Percentage of personnel expecting to be trained
h. Identification of resources and locations required to conduct trainings: room, hardware, supplies etc.
i. A training survey to be filled out by trainees after class
j. Recommended assessment strategy for participants to ensure readiness
k. Training assessment tools and strategy for training scheduling tools (Learning Management systems, etc.)
l. Approach of how lessons learned will be incorporated in future training plans
m. Identification of potential risks and mitigations
n. Approach to VA resource site based support to assign role-based learning journeys and assist in enrollment.
o. Strategy for VA resource site based training operational support.
p. Identify a materials management strategy that identifies how training materials are printed, stored, and accessed for appropriate classes
q. Site-to-site variations and identification of risk mitigation.
r. Sustainment training approach.
s. Super User Strategy to identify, resources requirements, processes, approaches, and roles and responsibilities to develop and execute a Super User approach.

Deliverable:
A. Training Strategy

5.3.4 EHRM STAKEHOLDER COMMUNICATIONS STRATEGY AND PLAN

The EHRM the Contractor shall create an EHRM Stakeholder Communication Strategy and Plan including end-users, managers, leadership, project team and other key participants to identify specific communication needs to the EHRM implementation. The Contractor shall coordinate with VA and Contractor EHRM Strategic Communications teams, as well as the EHRM PMO contractor to align messaging content and delivery to prepare stakeholders with specific information related to EHRM deployment. Stakeholder communications shall include the use of social media listening technology and surveys to assist site preparation assessments and support mass communications. The Contractor shall include communications to VA as well as legislative stakeholders in the strategy and planning process. Communications strategy and planning shall include development of:

a. EHRM Communication Repository
b. EHRM Communication Portal
c. Communication Style Guide
d. Initial Campaign Materials
e. Crisis Communication Plan

Deliverable:
A. Stakeholder Communication Strategy and Plan

5.3.5 WORKFLOW PLANNING AND FUNCTIONAL REQUIREMENTS MANAGEMENT

The Contractor shall:
a. Provide VA EHRM clinical and business workflows expertise to ensure delivery of end-user focused capabilities
b. Integrate with the VA clinical and business teams to document key requirements to be implemented within Cerner's solution
c. Define strategy and process for identifying new functional requirements and incorporating new requirements in the EHRM Roadmap
d. Develop a Workflow Development, Configuration and Normalization Plan to address VA-specific additions, modifications and configurations required to Cerner commercial baseline workflows.

The Contractor shall incorporate new requirements identified in the monthly progress report and provide updates to the VA RTM.

Deliverable:

A. Workflow Development, Configuration and Normalization Plan

5.3.6 DEPLOYMENT MANAGEMENT

The Contractor shall develop an EHRM deployment management strategy that:
a. Works with local governance stand-up and implementation; lead initial local clinical steering efforts to ensure inclusion of best practices
b. Tracks deployment activity status and user adoption metrics
c. Defines the deployment methodology and event structure to assist with communication and oversight
d. Guides planning, organization and resource management for VHA deployment activities and deployment initiatives
e. Oversees the deployment activities to ensure best practice alignment including EHRM functional and technical requirements.
f. Leads communication with project management office and deployment leads

The Contractor shall provide ongoing management and oversight to include:
   a. Coordination with project management office and change management teams to draft and execute plans to promote EHRM adoption
   b. Coordination with project management office, site and deployment teams to conceive, draft and distribute communications product
   c. Risk identification and proposed mitigation to successful adoption by working collaboratively with the other project team members
   d. Measuring and tracking program awareness

Deliverable:
A. Deployment Management Strategy

5.3.7 VALUE MANAGEMENT

The Contractor shall use the Value Realization Framework to create a Value Realization Strategy that aligns VA and EHRM project with desired outcomes. A high level description of VA's current Value Realization Framework is attached (Attachment A-Value Realization Framework Snapshot). The Value Realization Framework measures Value through Critical Success Factors (organization goals), measurable Key Results Indicators (outcomes), objective and measureable Key Performance Indicators (actions). The Value Realization Strategy will include a value measurement plan that:

   a. Engages key National, VISN and VAMC stakeholders in the creation of value objectives
   b. Utilize the Value Realization Framework six perspectives of clinical, process improvement, financial, Veteran satisfaction, employee satisfaction and learning and growth to identify, measure and track performance, including technical and sustainment activities related to continuous performance improvement
   c. Describes how success will be defined, including a timeline for measurement
   d. Outlines a plan for communicating value to internal and external stakeholders

The Contractor shall continuously update the Value Realization Strategy and Plan to reflect improved deployment information.

Deliverable:
A. Value Realization Strategy

5.3.8 APPLIED INFORMATICS INSTITUTE

As part of the EHRM Change Management Strategy, the Contractor shall create an Applied Informatics Institute Strategy to build a learning culture and ongoing learning opportunities beyond the EHRM foundational training strategy. This institute will target key leadership, management and staff roles to fortify functional, technical, and management skills necessary to prepare the VA workforce for jobs leveraging the EHRM. In addition, to ensure the highest quality support for the VA workforce the institute will address foundational requirements including formal curricula necessary for contractor's partners.

The Contractor shall create an organizational university strategy that aligns to the VA EHRM project desired business outcomes. The Applied Informatics Institute strategy shall include but is not limited to:
  a. Identification of the purpose and vision of the organization.
  b. Definition of scope including target audiences and strategic objectives.
  c. Outline of curricula aligned to objectives, scope, and role (audience)
  d. Overview of delivery model necessary to foster optimal adult-learning opportunities, collaboration and peer-support
  e. Creation of a charter forming a joint advisory board between VA and Contractor to advise on curriculum standards, overall performance evaluation, and other strategic initiatives as agreed upon.
  f. Collaboration with the VA on staff educational needs to drive estimated number participants to inform operational planning including hiring of facilitators, support staff, technical support, content developers, etc.
  g. Collaboration with VA on automated communication of Applied Informatics Institute training status to the VA talent management system.
  h. Outline of facilities plan, delivery locations, travel and other cost and finance implications.
  i. Identification of supporting learning technology components necessary to support optimal human-learning across a diverse and widely-dispersed workforce.
  j. Recommendations on institute branding and partnerships, through collaboration with VA.
  k. Creation of a marketing and communications approach to inform targeted leaders, managers and staff of ongoing learning opportunities
  l. Definition of strategy and onboarding requirements for Contractor partner's including, scheduling, enrollment, competency standards, certification, and logistics.

Deliverable:
A. Applied Informatics Institute Strategy

5.4   EHRM TECHNICAL MANAGEMENT PLANNING, OVERSIGHT, AND SUPPORT

The Contractor shall provide the technical thought leadership required to support the technical management planning activities and provide ongoing technical oversight

required throughout the TO period of performance. This includes but is not limited to software, hardware, and workflow configuration (terminologies, knowledge artifacts).

5.4.1 ARCHITECTURE MANAGEMENT

The Contractor shall provide and execute architecture design, planning and ongoing management and oversight support to ensure proper development, hosting, deployment and execution of all components of the EHRM solution. The Contractor shall develop the solution architecture using engineering best practices. The Contractor shall work with the applicable technical work groups to account for data architecture, infrastructure architecture, system design, and standards as part of the Solution Architecture.

The Architecture Management Plan shall include:

a. identification and specification of internal and external interfaces including Interface Control Documents
b. Development and continuous update of an EHRM Solution Roadmap to account for the sequence of solution components and new features.
c. Identification of relevant areas of the program for which national standards apply, approaches to continuously manage standards and adherence to standards, identification of areas of the program for which standards do not exist, participation in standards organizations.
d. Planning for VistA sunsetting: Upon the deployment of the EHRM-deployed solution at the site with the current functionality the site's VistA instance will either be fully shut down or will be fully up and running. Additional states of VistA may be achieved through modifications:
    1. Running with ALL logins disabled and no automated processes (interfaces, tasked jobs)
    2. Running with READ ONLY access for all existing users and automated processes
    3. Running with WRITE access to select VistA applications not yet replaced by EHRM effort, also with READ ONLY access for all existing users to other VistA applications

Deliverable:

A. Architecture Management Plan

5.4.2 DATA MIGRATION

The Contractor shall create a Data Migration Plan including the following:

a. Plan and document the data ingestion mechanism and processes along with terminology mapping to standards associated with data migration and data synchronization/syndication.

b. Implementation sequence and priorities, data quality, data volumes, data provenance, data validation, and patient identity data integrity.
c. Approach to master data management, data storage, access, data conversion, and data security strategies, addressing necessary metadata to support access control rules.

d. Identification of key clinical data in VistA along with other relevant systems and outline a strategy to make it viewable and actionable.
e. Plan initial and incremental loading of data into HealtheIntent to include batch and streaming (i.e. near real-time) options
    1. The Contractor shall create and propose a rollout strategy and plan for the Cerner HealtheRecord COTS product
    2. The Contractor shall create and propose a rollout strategy and plan for the Cerner HealtheCare COTS product
    3. The Contractor shall create and propose a rollout strategy and plan for the Cerner HealtheLife COTS product
    4. The Contractor shall create and propose a rollout strategy and plan for the Cerner HealtheRegistry COTS product
f. Analyze and propose way forward for the capability for external apps and partners to use HealtheIntent as a data source
g. Organize and facilitate a Joint VA/DoD/Cerner Data Governance Board to develop strategy and priorities for addressing the ingestion of data domains into the EHRM products.
h. Create a strategy with VA to establish an archival instance of a VistA instance once the site has migrated to Millennium and the local VistA instance is no longer being updated. This instance will be accessible and can be used for high latency extraction.
i. Review the list of VA custom registries and create a Registry migration strategy and plan for addressing VA custom registry capabilities not included in the baseline Cerner HealtheRegistry COTS product.
j. Create a plan to develop VA-required federal, state and local reporting based on data migrated to HealtheIntent.
k. The plan shall include continuity of VA operation using Cerner data and making data available to external applications and partners.

Deliverable:

      A. Data Migration Plan

5.4.3 EHRM AND VA SYSTEM INTEGRATION

The Contractor shall identify common VA-owned applications where interfaces are required for all EHRM deployment sites with input from VA. This shall include currently deployed interfaces identified in Section D of the base ID/IQ, Attachment 004 as well as those which VA develops or procures during the performance of this contract. Integration requirements may include, but are not limited to:

A. Existing VistA integrations to external or internal support systems
B. Community Care Clinics – including medical documentation required for provider payment if provided in electronic format.
C. Medical Devices – Internal and External
D. Mobile Apps / Mobile Devices – Internal and External
E. CMOPs

The Contractor shall analyze interface requirements and develop an Interface Development Plan for IOC. The Contractor shall:

i. Analyze interface requirements for the initial list of identified interfaces and identify additional required interfaces
ii. Document initial interface analysis.
iii. Update the System Description Document (SDD) to include required interfaces
iv. Identify interfaces that may require changes to Cerner and/or VA-systems at the User Interface (UI) level.
v. Analyze interface requirements to define the sizing and level of effort associated with the development required for each interface
vi. Provide an interface development level of effort sizing framework

Deliverable:

A. EHRM and VA System Integration Plan

5.4.4 IDENTITY AND ACCESS MANAGEMENT

The Contractor shall develop a Identify and Access Management (IAM) Plan. The IAM Plan shall provide strategy and planning specifically addressing the following functions: Patient Identity Management, Internal User Account Management, Self-Service Identity and User Management and Non-Person Entity Access. The IAM Plan shall include the overarching approach, standards followed, explanation of integrations, expected challenges, applicable Cerner and/or DoD lessons learned, the phases of implementation, a subsection for Architecture, Design, Sequencing and Dependencies, and a Testing Plan specific to each function identified above.

The initial deliverable will cover overall approach to those topics at a high level. Subsequent iterations will provide additional level of detail around these areas.

Deliverable:

A. Identity and Access Management Plan

5.4.5   DATA EXCHANGE – APPLICATION PROGRAM INTERFACE (API) PLAN

The Contractor shall develop a plan for exposing APIs. The plan shall be submitted to VA SMEs for review and concurrence.

Deliverable:

> A. API Plan

5.4.6   INVENTORY MANAGEMENT

The Contractor shall develop a plan for inventory management at the IOC sites. The plan shall be created with consideration of the VA transition to DMLSS, the timing of that transition, and any workarounds required for IOC go-live. The plan shall be submitted to VA SMEs for review and concurrence.

The Contractor shall continuously update the deliverables to reflect any changes to the EHRM approach.

Deliverable:

> A. Inventory Management Plan

5.4.7   INTEROPERABILITY PLAN

The Contractor shall develop an Interoperability Plan describing the approach to meeting the seamless interoperability requirements defined in PWS Section 5.10.4 of the EHRM basic PWS. Furthermore, the Contractor shall conduct an annual Interoperability Self-Assessment against standards that shall be specified by VA, such as those promulgated by Office of the National Coordinator for Health Information Technology (ONC), Centers for Medicare and Medicaid Services (CMS) etc. or future standards to be identified by VA. . The annual assessment will report on the state of each data element (e.g., which are supported in what capacities and in which formats). This will help assure standards implementation consistency and assure standards compliance with evolving national standards. This information shall be captured in the Interoperability Plan deliverable, and updated annually.

Deliverable:

> A. Interoperability Plan

5.4.8   TECHNICAL REQUIREMENTS MANAGEMENT

The Contractor shall develop and implement a Technical Requirements Management Plan to outline the activities associated with managing the EHRM requirements. This

plan will be in concurrence with the VA strategy to include identification and prioritization of any new requirements and will be submitted to VA for approval.

The Contractor shall provide ongoing requirements management subject to governance to include:

   a. Overall management of requirements
   b. Alignment of engineering and deployment activities meet requirements
   c. New requirement identification and prioritization management
   d. Requirements Traceability to solution components, test scripts, test cases, and test results.

Deliverable:
   A.   Technical Requirements Management Plan

5.4.9 CONFIGURATION MANAGEMENT

The Contractor shall provide and execute a Configuration Management (CM) Plan for EHRM. The Configuration Management Plan shall define how changes to the EHRM shall impact other VA hardware, software or workflows.

The Contractor shall manage and track inventory of all project artifacts baselined and versioned to include software project engineering documents, communications artifacts, and other project artifacts, labeling updates and versions according to CM procedures. Additionally, the Contractor shall include sustainment activities in the Configuration Management Plan.

The Contractor shall participate, support, and provide input and recommendations to the EHRM change control processes.

The Contractor shall provide ongoing configuration management support.

Deliverable:
   A.   Configuration Management Plan

5.4.10 TEST MANAGEMENT

The Contractor shall create and maintain a Master Test Plan with input and concurrence from VA EHRM Program Office, provide testing process documentation which includes but is not limited to, areas of test design, test traceability, test execution (white box testing, black box testing, regression testing as applicable), and the tools used.

The Contractor shall include test and evaluation strategy components including, but not limited to the following: Contractor testing activities, joint VA and Contractor data migration testing (covers the data extract, transformation, loading, and data integrity validation).

The Contractor shall provide ongoing management and oversight to include: testing for non-functional requirements found in the Government RTM, site testing such as Integration Validation and medical device testing activities during site deployments

The Contractor shall participate in a Test Integration Workgroup that is comprised of VA organizations that have roles and responsibilities in the VA EHRM Test & Evaluation. The Contractor shall provide a plan and support for the following:

a. For new development that is part of the Generally Available (GA) set of software solutions, the VA may request the ability to verify projects to ensure that they are consistent with ISO and FDA certifications.

b. Provide input and participation into the creation of the VA EHRM Program Test & Evaluation Plan which is developed by the government.

c. Ensure the Master Test Plan addresses the EHRM's ability to meet the non-functional requirements in the Government RTM particularly performance, scalability (at scale for anticipated number of concurrent users), back out of an exception package/patch or rollback to previous version.   For non-functional requirements such as performance, scalability, accessibility and section 508, the plan may include such activities as government test observation of performance testing in Contractor test lab, government analysis of previous performance/abilities testing results, qualifications by similarities evaluation.

d. Provide support for the VA Test and Evaluation including items such as participation in test and evaluations defect/issues processing, assistance in troubleshooting/triaging, jointly troubleshooting issues that appear to be development/test environment related, responding to findings from test and evaluation activities.

e. Provide overall test environment coordination, planning and process definition including the number of test environments, which VA, DoD and Cerner components are connected to each environment, and where different types of testing will occur.

f. Include a Test Data Management Plan, as part of the Master Test Plan, with input and concurrence by the VA. Interface testing & VA Test & Evaluation testing will require the creation and provisioning of test data using enterprise and facility data collection workbooks early enough in either EHRM Baseline preparation or wave planning, site assessment cycle to support interface development, interface testing, and VA Test and Evaluation test events. Test

Data within the non-production environments is not allowed to be production data.

g. Provide ongoing testing management and oversight

h. Include a Defect Management Plan, as part of the Master Test Plan addressing the processes for identifying, documenting, triaging and prioritizing findings during test that can be considered defects requiring resolution.

The Contractor shall implement, manage, and execute the Defect Management Plan that includes defect identification, tracking, resolution, metrics and reporting of defects throughout the EHRM Deployment.

Deliverable:
A. Master Test Plan

5.4.11 DATA MANAGEMENT PLAN

The Contractor shall support data migration and management planning to support seamless care and to ensure operational integrity.

The Contractor's Data Management Plan (DMP) shall describe the approach for:
a. Analysis of data stored in VistA including historical data, interfaces, and paper records to determine data-migration requirements
b. Analysis of data stored in other legacy systems to determine data migration approach and interface requirements if any.
c. Legacy data management and archiving
d. Ingestion and syndication of data with other government agencies and affiliates.
e. Ensuring operational integrity for CDW based enterprise solutions
f. Analyzing and identifying dependencies on legacy systems, to include national and class 3 applications

The Contractor shall provide ongoing data management and oversight.

Deliverable:
A. Data Management Plan

5.4.12 CYBERSECURITY MANAGEMENT

The Contractor shall initiate cyber security planning activities to include reviewing and validating security requirements, developing assessment and authorization artifact templates, and developing a Cybersecurity Management Plan.

The Contractor shall provide ongoing security management and oversight to ensure Security Plan, requirements and processes are adhered to.

Deliverable:
    A. Cybersecurity Management Plan

5.4.13 IMPLEMENTATION PLANNING

The Contractor shall develop the EHRM Implementation Management Plan and provide ongoing oversight of the following areas:
    a. Capacity Planning
    b. Performance Engineering
    c. Environment Management
    d. Hosting
    e. Deployment of new development, including changes in legacy applications
    f. Continuity of Operations (COOP), Disaster Recovery (DR), and Business Continuity Planning Services

Deliverable:

    A. Implementation Management Plan

5.5   PRE-IOC INFRASTRUCTURE BUILD, PLANNING AND STRATEGY

In preparation for IOC, the Contractor shall provide a pre-IOC infrastructure build consisting of an operational managed services solution for EHRM applications (software and subscriptions), application services and all supporting third party content required to deliver the functional and non-functional requirements set forth in the Requirements Traceability Matrix (RTM) included as an Attachment to the basic EHRM IDIQ.

5.5.1 VA EHRM BUILD ENVIRONMENT

The Contractor shall begin pre-IOC readiness activities to reduce IOC schedule risks by performing the following pre-IOC activities:

    a) Install and configure VA EHRM baseline build environment and computing infrastructure, including but not limited to:
        i.   Create VA build domain instance from a copy of the current DHMSM Cerner PROD environment;
        ii.   Acquire, install and maintain VA EHRM baseline software, content and configure VA EHRM Build environment infrastructure;
        iii. Provide EHRM software installation event activity report (EAR) documenting milestone notification completed by the Contractor and VA during the Pre-IOC Infrastructure Build phase.

      iv.   The Contractor shall perform a demonstration of the installed software items.

b) Perform regression testing to assess the impact of a change and to ensure the introduction of new software does not introduce defects. Regression testing shall be executed after the environment is created and the software is installed. The Contractor shall provide Baseline Build Regression Test Results.

c) Create draft engineering plans and baseline system documentation.

d) Develop the agendas and documentation needed for IOC Current State Review.

e) Review the DHMSM Standard Design Decisions and workflows in the newly created VA EHRM Build domain.

The Contractor shall document the current status of pre-IOC build activities in the Monthly Progress Report.

Deliverables:

    A.   EHRM Software Event Activity Report (EAR)
    B.   Baseline Build Regression Test Results
    C.   Draft engineering plans and baseline system documentation

5.5.2 PRE-IOC BUILD INFRASTRUCTURE AND SOFTWARE MAINTENANCE

The Contractor shall provide its commercial support and maintenance services described in its End User License Agreement. Leveraging Contractor's best practices and agreed upon upgrade schedule between DoD and VA, software maintenance includes all releases of the software such as major releases, minor releases, maintenance releases. The build infrastructure and software maintenance period shall begin upon the delivery and acceptance of the EAR defined in PWS task 5.3.

5.6 ENTERPRISE DESIGN AND BUILD

The Contractor shall conduct enterprise design and build activities utilizing the pre-IOC build domain in accordance with VA governance. The Contractor shall work with VA to perform the following:

    a.   Develop Enterprise Future State Workflows
    b.   Capture Enterprise Design Decisions
    c.   Collect Enterprise Data

The Contractor shall document the current status of enterprise design and build activities in the Monthly Progress Report.

Deliverables:

A. Baseline enterprise future state workflows
B. Baseline enterprise design decisions
C. Baseline enterprise data collection

5.7   OPTION PERIOD

All requirements defined in PWS Sections 5.1 through 5.4, to include all subparagraphs, and 5.5.2 shall be performed in the option period.

6.0   GENERAL REQUIREMENTS

6.1   PERFORMANCE METRICS

The table below defines the Performance Standards and Acceptable Levels of Performance associated with this effort. The Government may also utilize the commercially available and VA-specific Key Performance Indicators (KPIs) and Service Level Agreements (SLAs) defined at the ID/IQ level to measure performance under this TO, as applicable.

Performance Objective	Performance Standard	Acceptable Levels of Performance
A. Technical / Quality of Product or Service	1. Shows understanding of requirements 2. Efficient and effective in meeting requirements 3. Meets technical needs and mission requirements 4. Provides quality services/products 5. Meets performance thresholds/metrics defined in applicable Service Level Agreements	Satisfactory or higher
B. Project Milestones and Schedule	1. Quick response capability 2. Products completed, reviewed, delivered in accordance with the established schedule 3. Notifies customer in advance of potential problems	Satisfactory or higher
C. Price & Staffing	1. Currency of expertise and staffing levels appropriate 2. Personnel possess	Satisfactory or higher

Performance Objective	Performance Standard	Acceptable Levels of Performance
	necessary knowledge, skills and abilities to perform tasks	
D. Management	1. Integration and coordination of all activities to execute effort	Satisfactory or higher

The COR will utilize a QASP throughout the life of the TO to ensure that the Contractor is performing the services required by this PWS in an acceptable level of performance. The Government reserves the right to alter or change the QASP at its own discretion. A Performance Based Service Assessment will be used by the COR in accordance with the QASP to assess Contractor performance.

6.2   SECTION 508 –INFORMATION AND COMMUNICATION TECHNOLOGY (ICT) STANDARDS

All requirements in Sections 8.10, including subparagraphs, of the EHRM Basic PWS apply to this effort. Deliverable requirements are further defined in the following subparagraphs. The Contractor shall comply with the technical standards at: https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-ict-refresh/final-rule/single-file-version.

6.2.1 REPRESENTATION OF CONFORMANCE

The Contractor shall provide a Section 508 Subject Matter Expert lead for VA EHRM 508 resources to work with, as well as a Section 508 Test and Delivery Plan. The Section 508 Test and Delivery Plan shall provide a description of the contractor's approach to development, testing and delivering Information and Communication Technology (ICT) that meets Section 508 Refresh Success Criteria and Conformance Requirements for not-yet-developed ICT deliverables.

The Contractor shall submit a Government Product Accessibility Template (GPAT) to verify Section 508 conformance of its products and/or services. A Voluntary Product Accessibility Template (VPAT) may be used as an alternative conformance statement to indicate level of conformance.

The Contractor shall provide a Section 508 Accessibility Roadmap detailing the approach and identifying the key activities required for ensuring and sustaining 508 compliance.

The Contractor shall work closely with VA Section 508 representatives to verify Section 508 conformance of its products and/or services.

Deliverables:

A. Section 508 Test and Delivery Plan
B. GPAT/VPAT

6.2.2 ACCEPTANCE AND ACCEPTANCE TESTING

The Contractor shall provide Final Section 508 Compliance Test Results. The Section 508 Test Results shall include a GPAT/VPAT Conformance Statement validating conformance to Section 508 Refresh Success Criteria and Conformance Requirements for already-developed ICT deliverables.

The Final Section 508 Test Results shall be reviewed and approved by VA Section 508 representatives to validate conformance to Section 508 Refresh Success Criteria and Conformance Requirements for ICT deliverables.

For software development for VA interfaces/systems, the Contractor shall prepare and submit a Section 508 Conformance Validation Package with content as outlined in VA Process Asset Library, Software Development Product Build process map.

The Section 508 Conformance Validation Package shall be reviewed and approved by VA Section 508 representatives to validate conformance to Section 508 Refresh Success Criteria and Conformance Requirements for ICT deliverables.

Automated test tools, manual techniques, and checklists are used in the VA Section 508 compliance assessment.

Deliverable:
A. Final Section 508 Compliance Test Results
B. Section 508 Compliance Validation Package

6.3   SHIPMENT OF HARDWARE OR EQUIPMENT

Not applicable.

6.4   ENTERPRISE AND IT FRAMEWORK

Not applicable.

6.5   ORGANIZATIONAL CONFLICT OF INTEREST

All functions related to Acquisition Support shall be on an advisory basis only. Please be advised that since the awardee of this Task Order will provide systems engineering, technical direction, specifications, work statements, and evaluation services, some restrictions on future activities of the awardee may be required in accordance with FAR 9.5 and the clause entitled, Organizational Conflict of Interest, found in Section H of the

EHRM basic contract. The Contractor and its employees, as appropriate, shall be required to sign Non-Disclosure Agreements (Appendix A).

APPENDIX A

CONTRACTOR NON-DISCLOSURE AGREEMENT

This Agreement refers to Contract/Order _____ entered into between the Department of Veterans Affairs and _____ (Contractor).

As an officer of *<fill in name of Contractor>*, authorized to bind the company, I understand that in connection with our participation in the *<fill in program>* acquisition under the subject Contract/Order, Contractor's employees may acquire or have access to procurement sensitive or source selection information relating to any aspect of *<fill in program>* acquisition. Company *<fill in name>* hereby agrees that it will obtain Contractor - Employee Personal Financial Interest/Protection of Sensitive Information Agreements from any and all employees who will be tasked to perform work under the subject Contract/Order prior to their assignment to that Contract/Order. The Company shall provide a copy of each signed agreement to the Contracting Officer. Company *<fill in name>* acknowledges that the Contractor - Employee Personal Financial Interest/Protection of Sensitive Information Agreements require Contractor's employee(s) to promptly notify Company management in the event that the employee releases any of the information covered by that agreement and/or whether during the course of their participation, the employee, his or her spouse, minor children or any member of the employee's immediate family/household has/or acquires any holdings or interest whatsoever in any other private organization (e.g., contractors, offerors, their subcontractors, joint venture partners, or team members), identified to the employee during the course of the employee's participation, which may have an interest in the matter the Company is supporting pursuant to the above stated Contract/Order. The Company agrees to educate its employees in regard to their conflict of interest responsibilities.

Company *<fill in name>* further agrees that it will notify the Contracting Officer within 24 hours, or the next working day, whichever is later, of any employee violation. The notification will identify the business organization or other entity, or individual person, to whom the information in question was divulged and the content of that information. Company *<fill in name>* agrees, in the event of such notification, that, unless authorized otherwise by the Contracting Officer, it will immediately withdraw that employee from further participation in the acquisition until the Organizational Conflict of Interest issue is resolved.

This agreement shall be interpreted under and in conformance with the laws of the United States.

_____
_____

Signature and Date   Company

_____
_____

Printed Name   Phone Number

CONTRACTOR EMPLOYEE
PERSONAL FINANCIAL INTEREST/PROTECTION OF SENSITIVE INFORMATION
AGREEMENT

This Agreement refers to Contract/Order _____ entered into
between the Department of Veterans Affairs and _____ (Contractor).

As an employee of the aforementioned Contractor, I understand that in connection with
my involvement in the support of the above-referenced Contract/Order, I may receive or
have access to certain "sensitive information" relating to said Contract/Order, and/or
may be called upon to perform services which could have a potential impact on the
financial interests of other companies, businesses or corporate entities. I hereby agree
that I will not discuss or otherwise disclose (except as may be legally or contractually
required) any such "sensitive information" maintained by the Department of Veterans
Affairs or by others on behalf of the Department of Veterans Affairs, to any person,
including personnel in my own organization, not authorized to receive such information.

"Sensitive information" includes:

(a) Information provided to the Contractor or the Government that would be
competitively useful on current or future related procurements; or

(b) Is considered source selection information or bid and proposal information as
defined in FAR 2.101, and FAR 3.104-4; or

(c) Contains (1) information about a Contractor's pricing, rates, costs, schedule,
or contract performance; or (2) the Government's analysis of that information;
or

(d) Program information relating to current or estimated budgets, schedules or
other financial information relating to the program office; or

(e) Is properly marked as source selection information or any similar markings.

Should "sensitive information" be provided to me under this Contract/Order, I agree not
to discuss or disclose such information with/to any individual not authorized to receive
such information.   If there is any uncertainty as to whether the disclosed information
comprises "sensitive information", I will request my employer to request a determination
in writing from the Department of Veterans Affairs Contracting Officer as to the need to
protect this information from disclosure.

I will promptly notify my employer if, during my participation in the subject
Contract/Order, I am assigned any duties that could affect the interests of a company,
business or corporate entity in which either I, my spouse or minor children, or any
member of my immediate family/household has a personal financial interest. "Financial
interest" is defined as compensation for employment in the form of wages, salaries,
commissions, professional fees, or fees for business referrals, or any financial

investments in the business in the form of direct stocks or bond ownership, or partnership interest (excluding non-directed retirement or other mutual fund investments). In the event that, at a later date, I acquire actual knowledge of such an interest or my employer becomes involved in proposing for a solicitation resulting from the work under this Contract/Order, as either an offeror, an advisor to an offeror, or as a Subcontractor to an offeror, I will promptly notify my employer. I understand this may disqualify me from any further involvement with this Contract/Order, as agreed upon between the Department of Veterans Affairs and my company.

Among the possible consequences, I understand that violation of any of the above conditions/requirements may result in my immediate disqualification or termination from working on this Contract/Order pending legal and contractual review.

I further understand and agree that all Confidential, Proprietary and/or Sensitive Information shall be retained, disseminated, released, and destroyed in accordance with the requirements of law and applicable Federal or Department of Veterans Affairs directives, regulations, instructions, policies and guidance.

This Agreement shall be interpreted under and in conformance with the laws of the United States.

I agree to the Terms of this Agreement and certify that I have read and understand the above Agreement. I further certify that the statements made herein are true and correct.

_____
_____
Signature and Date   Company
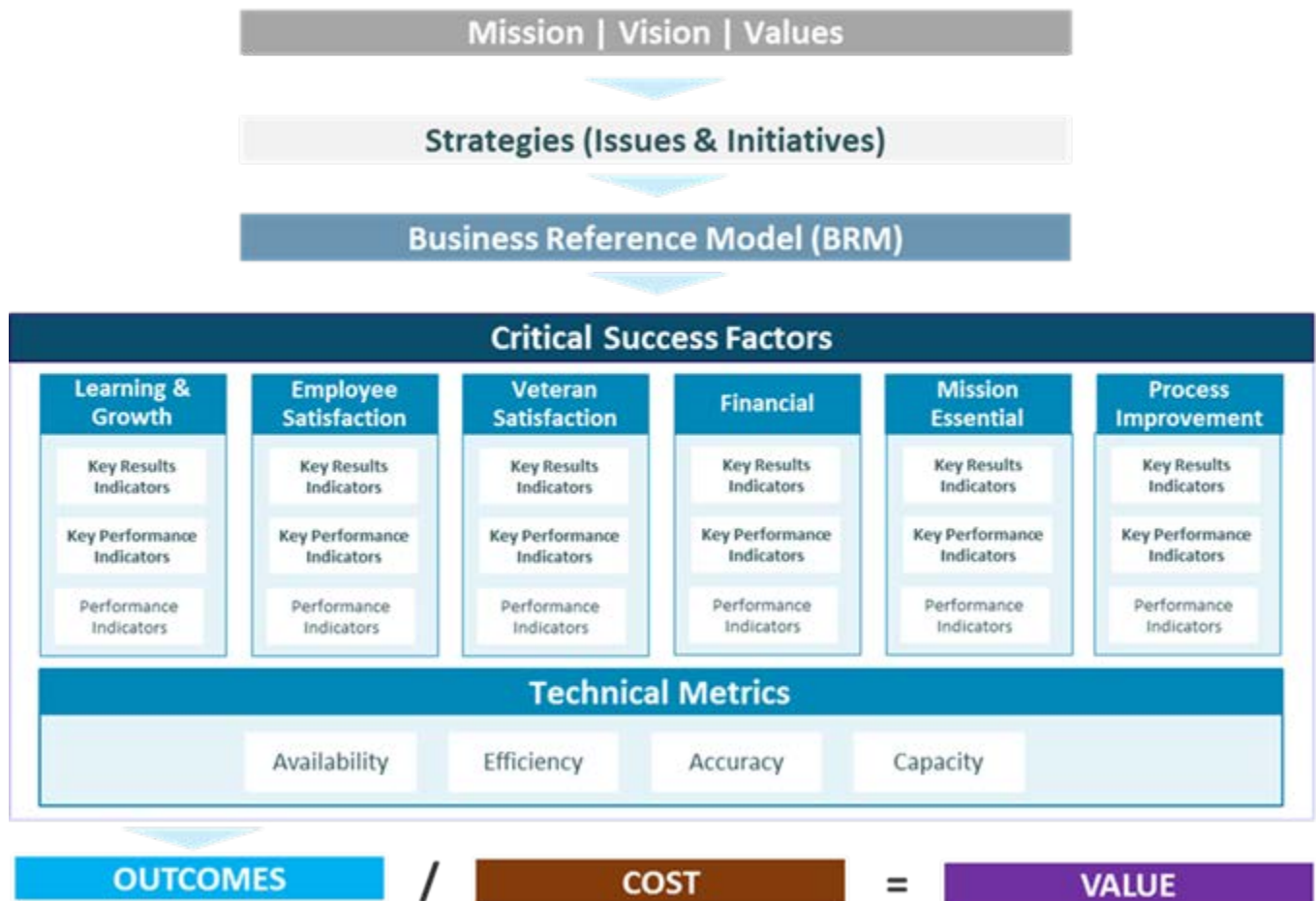

_____
_____
Printed Name   Phone Number

APPENDIX B

The Value Realization Framework (VRF) leverages concepts from the Balanced Scorecard to "translate an organization's mission and strategy into a comprehensive set of performance measures" and contextualizes these measures for service delivery.

Mission Essential Functions (Ex. Clinical)
Providing the best quality and effectiveness on healthcare and benefits services to Veterans without error and harm in order to return the Veterans to a state of comfort and peace.

Process Improvement
Improving efficiency in completing all tasks required for providing the best services to the Veterans.

Financial
Providing cost-effective services to Veterans while maintaining their quality.

Veteran Satisfaction

Providing health care and benefits services with respect, compassion and empathy, by exceeding the needs and expectations of Veterans and their family members.

Employee Satisfaction
Providing pathways for VA employees to serve Veterans in models that are more effective, efficient, sustainable and conducive to restoring and preserving professional satisfaction.

Learning & Growth
Promoting a knowledge-based culture of best practices and standards in order to improve the performance and outcomes throughout the organization.