

Statement of Work

For

Healthmatters Community Hospital Website

Between: Healthmatters Community Hospital

and: Web Works, LLC

Prepared by: Kevin Scharnhorst, CIO

Table of Contents

<u>1.0 Introduction</u>	4
1.1 Project Title	4
1.2 Background.....	6
<u>2.0 Staffing Roles and Responsibilities</u>	9
2.1 Staffing.....	9
<u>Project Manager – Contractor</u>	9
<u>Project Manager – Organization</u>	9
2.2 Roles and Responsibilities Matrix	11
<u>3.0 Key Assumptions</u>	14
<u>4.0 Risks</u>	15
<u>5.0 Scope of Work</u>	15
5.1 Inclusions	16
5.2 Exclusion.....	17
5.3 Deliverables.....	18
5.4 Milestones	20
<u>6.0 Work Approach</u>	21
<u>7.0 Completion Criteria and Final Acceptance Criteria ...N/A</u>	21
7.1 Completion Criteria	22
7.2 Final Acceptance	22
<u>8.0 Schedule</u>	22
<u>9.0 Project Management (if applicable)</u>	22
<u>10.0 Relevant Organizational Policies Standards, Supported Software and Computing Environment</u>	23
<u>11.0 Timeline and Period of Performance</u>	23
<u>12.0 Compensation and Payment Schedule</u>	23
<u>13.0 Miscellaneous</u>	24

14.0 Appendices25
Execution/Signature Blocks26

Statement of Work

1.0 Introduction

1.1 Project Title

This work is being performed for the purpose and intent of capturing greater market share for Healthmatters Community Hospital through direct marketing to patients through a new website. The website will help achieve capabilities in attracting new patients, recruiting staff and extending healthcare management functions to patients. Online services that will be offered shall include, but not be limited to, appointment scheduling for patients, staff recruitment of prospect employees, physician referral and patient record management.

Four primary directives are being sought out as combined interests of executive leadership. Those include:

- Investing marketing improvements to reshape and establish a prominent brand and image within the community.
- Improving recruitment capabilities through online avenues that enable potential job seekers the ability to search and apply for available positions with a project focus on clinical staff and in particular nursing jobs.
- Improving revenue stream to achieve a self- sustaining financial model for the website. Cost reduction and efficiency gains will improve the financial position of the hospital through improvements that center on patient scheduling, online bill payment and physician referral acceptance.

- Patient outcomes will improve by enabling patients to schedule and manage appointments online, see expected wait times and manage their personal health records through patient portals.

It is the hospital's desire to retain services of an outside firm to develop the website. The scope of the project shall consider all resources necessary to perform analysis and design to establish technical and functional requirements needed to fulfill a request for proposal from outside web development firms. Also within scope is to establish the financial budgets needed to support a successful implementation and ongoing maintenance of the project. Through discovery, all interested stakeholders shall be identified. Roles and responsibilities will be outlined so that those responsible for decisions in the project can be made accountable. Those with an interest to be informed throughout the project lifecycle will be. Business owners and stakeholders include the following:

- John Goss – Chief Executive Officer
- Valarie Moore – Chief Financial Officer
- Nancy Casazza – Chief Nursing Officer
- Kevin Scharnhorst – Chief Information Officer
- Samantha Speaks – Chief Marketing Officer

This Statement of Work (SOW) is made and entered by and between Healthmatters Community Hospital and Web Works, LLC. This SOW incorporates by reference the terms and conditions of Contract Number 20110925-001 in effect between Healthmatters Community Hospital and Web Works, LLC. In case of any conflict between this SOW and the Contract, the Contract shall prevail. The Healthmatters Community Hospital and Web Works, LLC agree as follows:

1.2 Background

1.2.1 History

The hospital, in current state, has a website which is informational in nature. The site lacks interactive capabilities which would enable the healthcare organization (HCO) to collect information from its visitors. It is the desire of the HCO to enhance its current website to serve its current service of sharing information and add others which would capitalize on interacting with prospective employees and allow for enhanced recruitment campaigns to augment professional clinical staff when needed and to empower patients to do online appointment scheduling, manage their personal health record (PHR) and perhaps interact with their provider and nurses. Through these enhanced capabilities the HCO will be able to directly reach the desired audiences and market to them to help accomplish the goal of capturing its fair share of revenue in its market space. All of these capabilities shall be fully integrated and interoperable with the website as the front end graphical user interface (GUI) to the HCOs existing back end systems.

1.2.2 Business Drivers

Market share is the primary business driver for the new HCO website project. The makeup of the community in which the HCO serves is very competitive with 4 or 5 other HCOs in the area that directly compete. Currently, our HCO is considered 4th or 5th and through the project we wish to separate ourselves from the competition and establish ourselves as a market leader through the new services that will be offered in the site redesign. Accessibility to information and services will be one of the forefront features of the site. Functional and usability will be a primary factor considered in choosing a service provider for delivery of the project. The site will facilitate information exchange with patients and referring providers and enable clinical job recruitment. When successfully implemented, the site will extend best of class service to the constituents that the HCO serves and set it apart from the community

hospitals that it competes. With increased market share, the HCO will have future funding to allow it to grow future capital and fund further initiatives to help it grow and improve care for the patients it serves.

1.2.3 Competing Priorities

In its current position in the community and considering economic conditions, the HCO cannot help but be conscience of budget constraints. It wants to maximize benefits and at the same time minimize costs to achieve the directives of the project. The HCOs Chief Medical Officer and Chief Information Officer (through the initial idea of his Medical Informaticist) have sponsored the project. The project will be restrained by budgetary allowances and competing projects within the enterprise. Additionally, technical expertise to support the website long term do not exist internally and may require augmented staff externally to host and support the site. All of the mentioned factors will be considered in the final recommendation and proposals received.

1.2.4 Objectives

The HCO shall expand its suite of online services and extend its capabilities to receive information from patients, prospective employees and referring physicians. To do this, the project needs to achieve the following objectives.

- Graphical aspects of the forward facing website shall incorporate consistent use of company logos and color schemes.
- The site should be implemented in a content management system (CMS) framework to enable staff to manage content.
- Backend systems such as the electronic medical record (EMR), decision support system (DSS), Enterprise Data Warehouse (EDW), Patient Scheduling System, Human Resource Recruiting

Systems, etc shall integrate with information received from the website and have the ability to publish information to the website.

- Information exchanged through the website to internal systems should utilize data standards such as HL7 messaging or EDI (for external partners such as referring physicians).
- The website solution should have the ability to be hosted externally and still enabled to integrate with the internal systems mentioned.
- Website should have public facing portal for prospective clinical recruitment.
- Website should have public facing patient portals for personal healthcare record management supporting medical record management, patient registration and patient scheduling.
- Website should be able to accept physician referrals.
- Technologies implemented must align with current information technology roadmap.

1.2.5 Reference to other applicable documents

- Request for Proposal
- Contract
- System Use Cases
- Requirement Documents (Business, Functional and Technical)
- Project Plan
- Implementation Plan

2.0 Staffing Roles and Responsibilities

2.1 Staffing

Project Manager – Contractor

The Contractor's Project Manager is:

Name: Brady Turnbow

Organization Name: WebWorks, LLC.

Address: PO Box 5680

City: Columbus

State: Ohio **Zip:** 43202

Phone: 800-233-0010 x 1023

Cell: 614-250-7566

Fax: 614-210-1123

Email: brunbow@webworks.com

Project Manager – Organization

The Organization's Project Manager is:

Name: Peter Hellstrom

Organization Name: Healthmatters Community Hospital

Address: PO Box 4523

City: Media

State: Pennsylvania **Zip:** 19063

Phone: 800-333-1111 x 20

Cell: 484-284-9980

Fax: 484-310-5565

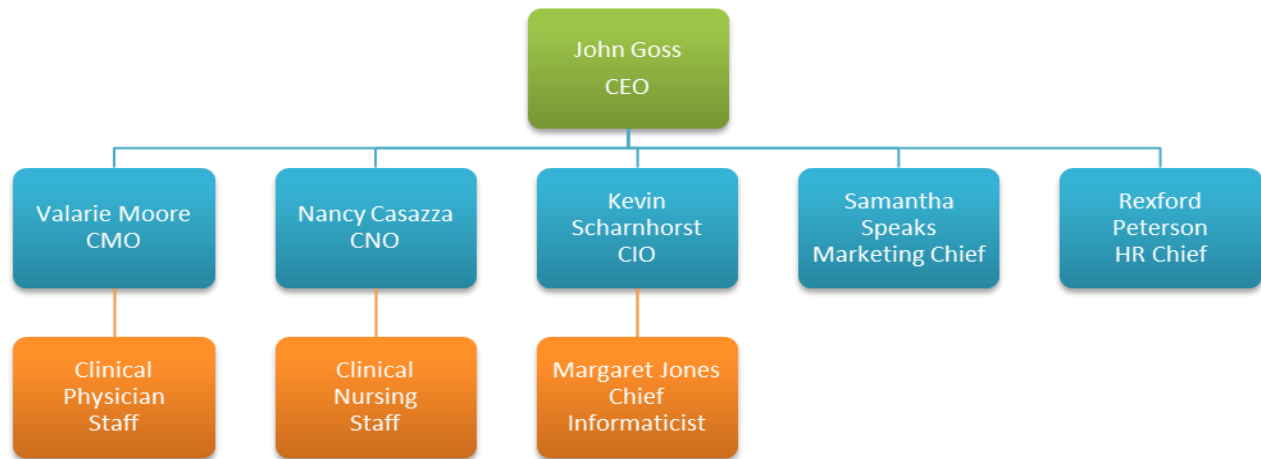
Email: phellstrom@healthmatters.com

The project will require a variety of skills and resources in order to accomplish the integrated nature of the project across the enterprise. It is expected that the following would be needed at points and throughout the duration of the project. The below represents full time equivalent resources that will be utilized internal to the organization

- Project Managers – 2 FTE (100%) respectively dedicated to manage tasks and deliverables for contractors and one separate for internal organizational resources.
- Business Lead(s) – One FTE (50%) will be required from each of the following areas; Marketing, Human Resources and clinical. These FTEs will be responsible for defining business requirements and testing scenarios from perspective business area.
- Technical – The Information Systems department shall be represented with a technical lead that will manage and oversee the technical development efforts of both internal and contract resources. The technical lead will supply regular updates to the internal project manager. In addition, six technical subject matter experts (SMEs) will be assigned to the project and will be dedicated 25% to 50% to the project to perform technical analysis, development, documentation and testing. The mix of skills will include a 1 database administrator (DBA), 1 network admin, 3 software developers and 1 software architect. The department will also supply its Chief Informaticists (Margaret Jones) and allocate 75% of her time to help lead and develop the project and negotiate requirements.
- Quality Assurance and Functional Area – 2 FTE (100%) functional analysts will be dedicated to develop functional specifications, use cases and test cases.

- Training – 1 FTE (50%) will be dedicated to the project to ensure for adequate training to internal resources and create system documentation which will be available for training employee staff, external referring physicians and external website users.

Beyond the organizations internal resources, it is expected that the staffing model will need to be augmented through an outsourcing. The two project managers (one from the vendor side) will work together on a resource plan that will identify contract labor that will be needed so that we can seek hiring through an outside agency. The below chart provides a visual representation of the reporting structure and business areas that will be required to have representation on the project.



2.2 Roles and Responsibilities Matrix

The below matrix represents roles and responsibilities of organizational and contractor resources assigned to the project.

Responsible	Workgroup/Individuals	Primary Responsibility
Chief	- Represents the entire interest of	- Provide leadership and strategic guidance to C-

Executive Officer	<p>the hospital</p> <ul style="list-style-type: none"> - Must report and defend all fiduciary commitments to the board - Shared responsibility to report to the BOD with executive team - Articulates vision of the hospital 	<p>level</p> <ul style="list-style-type: none"> - Provide and support key deliverables to the project - Leverages communications – to stakeholders – e.g. community, physicians, local governments, political leaders - Understand and acknowledge capital growth plan - Ensure hospital is in sound financial position
Chief Information Officer & Chief Informaticist	<ul style="list-style-type: none"> - Technical Lead - Software Architect - Software Developer(s) - Network Admin - Informaticist - Database Administrator 	<ul style="list-style-type: none"> - Technical lead will attend all status meetings and report status of team. - Software architect will develop technical design and requirements for implementation - Software developers will be responsible for developing software and coordinating development of contract resources - Network admin will be responsible for server setup, firewall rules, backup strategy and disaster recovery for all landscapes - Informaticist will be responsible for negotiating requirements and liaison between other business area leads and executive leadership - Database Administrator will design and architect database and setup all database servers for all landscapes.
Chief Medical Officer	<ul style="list-style-type: none"> - Represents senior leadership for the medical staff - Serves as the liaison for medical staff and administration for the website redesign project - Physician web design team 	<ul style="list-style-type: none"> - Provide leadership and/or oversight of quality metrics, patient safety and population based content in the website redesign - Leveraging physician champions and other individuals needed for engagement of the project - Ensure that the health information content is reputable and user-centric - Participates with search engine optimization
Chief Nursing Officer	<ul style="list-style-type: none"> - Represents the Division of Nursing - Search engine optimization development strategy - Nursing Recruitment Coordinator 	<ul style="list-style-type: none"> - Research, provide development input for, and evaluate ‘search engine keywords’ so optimize candidates ability to access this facilities URL - Work with web designer to ensure site provides the correct application flow process - Lead nursing web design team (provides content

	- Nursing Web Design Team	input on nursing web site pages)
Chief Marketing Officer	<ul style="list-style-type: none"> - Chief Marketing Officer - Market Researcher - Public Relations Manager - Social Media Manager - Marketing Specialist - Hospital Services Liaison 	<ul style="list-style-type: none"> - Chief Marketing officer is responsible for developing the marketing strategies for the entire organization. The CMO manages the creation of the marketing messages and campaigns and the selection of marketing mediums such as print and website advertising. - Market researcher will perform data analysis of information collected to understand the needs of the community and the patients. - Public relations manager will promote hospital events and activities in the local media and serve as the primary media contact. - Social Media Manager will develop the organization's social media strategy by managing the organization's social media presence to enhance brand awareness that will generate inbound traffic and encourage utilization of hospital services. - Marketing specialist will develop and implement marketing strategies aimed at improving the organization's community engagement and patient recruitment and retention efforts. - Hospital Services Liaison will promote organizational activities by establishing and maintaining community relationships that result in referrals sources.
VP of Human Resources	<ul style="list-style-type: none"> - VP - Recruiter - HR Manager - Ombudsman 	<ul style="list-style-type: none"> - HR manger to attend regular status meetings - HR Manager to establish business, functional and usability requirements - Recruiter to represent testing efforts in QA stages. - Ombudsman to attend meetings related to human resource legal issues and conflict of interest work flow processes

Project Manager - Organization	<ul style="list-style-type: none"> - Create project schedule - Create project charter - Conduct project weekly status meetings - Conduct monthly leadership meetings - Coordinate with contract project manager - Create resource plan - Coordinate with respective internal leads the efforts of internally assigned tasks
Project Manager - Vendor	<ul style="list-style-type: none"> - Report and coordinate status to organizational PM - Attend regular status meetings - Create and maintain contractor resource plan

3.0 Key Assumptions

- Healthmatters Community Hospital does not have a union and as such is not restricted by union laws in considerations for recruitment.
- The Health Insurance Portability and Accountability Act applies to the HCO as a protected entity and as such shall be a consideration of any and all information exchange to or from the HCO network in scope of the project.
- This SOW states general requirements and expectations for purposes of further defining a later request for proposal (RFP) and as such will be modified for forecasted resource allocation when more details are known.
- Business agreements between the HCO and its project vendors shall be extended to agents working for or in behalf of the vendor.
- Contractor tasks and rates will be assigned and reviewed following resource schedule and RFP process and rates provided at that time.

4.0 Risks

- As pursuit of project milestones are encountered and risks that impact timeline, original project scope or resourcing constraints arise, these risks shall be escalated to respective project managers and discussed in regular status meetings. Task teams shall be formed to investigate issue and project impact and resolution plans to mitigate the risk.
- Acceptance shall be obtained through physical signature at critical milestones points of the project such as requirement completion, system design, user acceptance testing, regression testing and project go-live. “Sign off” shall represent acceptance and continuance to the next milestone in the project.
- Once acceptance is reached on requirements any change to agreed requirements shall be considered change of scope and requests will need to go through formal change control process requiring leadership approval and will be bid separately and implemented at a later time.
- Performance guarantees shall be negotiated to ensure and support the service level agreements (SLAs).

5.0 Scope of Work

The desire of the project is to accomplish as much as possible within nine to twelve months without sacrificing quality, functionality or usability. The directives set forth shall be pursued with primary attention given to the items listed in the inclusion list. In consideration of the aggressive timeline, it will not be expected that all directives of the future state vision can be achieved and the items listed in the exclusion list shall be considered for a future phase project after the initial project is live.

5.1 Inclusions

- The public facing website shall be implemented with its new look and be designed on a web 2.0 feel. The marketing team will be responsible for gathering a list of websites and concepts that appeal to the future look that is desired. They shall also apply all branding guidelines with logos, color schemes and corporate copyright information and deliver to the chosen consulting firm.
- An internal team at Healthmatters shall be assembled and tasked with producing a map for the website to conceptualize a potential page navigation structure. The map will identify the functional areas of the site and subpage content that will organize under them. The proposed navigation will be delivered to the contractor to be considered in the overall design.
- Under the direction of the CIO, the technical lead will perform analysis and design to identify system integration points and highlight interfaces in which the website will have to connect with to be provided to the chosen contractor.
- Under the direction of the VP of Human Resources, the team shall identify and develop requirements of an online eRecruiting application.
- Contractor shall develop and integrate physician referral component to the website.
- Contractor shall develop or identify integration for eRecruiting on the new website.
- Contractor shall develop or identify CMS framework to be used for the website. Open source solutions will be favored to reduce maintenance and implementation costs.

- Quality Assurance team in partnership with the Marketing department will develop reporting requirements and strategy for monitoring web traffic and metrics to measure effectiveness of the website in accomplishing its four main desires.
- Quality Assurance team will develop and execute test scripts to validate integration points between the website and backend systems. These test scripts will serve as criteria for signoff points for the project.
- Project manager(s) will develop project plans for respective internal and external resources, identify stakeholders, develop communication plan, develop project charter, develop resource plans, develop budgets, and coordinate all regular status meetings. Additionally it will be the project manager(s) responsibility to facilitate updates and meeting minutes. All pertinent information shall be made readily available through an internal web portal such as Microsoft SharePoint.

5.2 Exclusion

Although desired it will not be feasible to accomplish all that is envisioned for the future state website in the nine to twelve month time frame that is targeted. Approaching the project in a multi-phased approach will allow Healthmatters to establish the aesthetic improvements and needed framework to achieve success on items that will be pursued later. The multi-phased approach will also facilitate monitoring of metrics to start to analyze the return on investment (ROI). Those items that will be pursued in a subsequent phase include:

- The patient portal and PHR integration which will include patient registration, scheduling and records management.

- Online bill pay will be pursued ancillary to the inclusionary tasks in a future phase of the project and integrate in with the patient portal.

5.3 Deliverables

The below list are deliverables expected as part of the project with responsible person(s) identified and estimated dates stated. Deliverable due dates will be specifically set in the baseline project plan once developed and major milestones dates are listed in section 5.4 of this SOW.

Key Deliverable	Responsibility	Acceptance Criteria	Approval Required
Statement of Work	Project Manager(s)	Adheres to SOW Template	- Steering Committee Project sponsor - Project Manager(s)
Contract Signoff	Executive Leadership	Reviewed by legal counsel and agreed on by executive leadership	- Consensus by Executive Staff
Business Requirements Document	Business Leads	Must use PKI program template for BRD	- Steering Committee Project Sponsor
Design Specifications Document	Technical Team Lead and SMEs	Contains desired elements from specification. Acceptance shall be given by signature from responsible parties signature contained within the document	- CIO
System Architecture Diagram	Software Architect	Diagram will contain signature section for indication of acceptance	- CIO

Use Case Signoff	Business Leads	Use case shall show in visual diagram and narrative format how work flow will work and be accepted through signoff in document	- Steering Committee Project Sponsor
Entity Relationship Diagram	Technical Lead and Software Architect	Diagram will contain signature section for indication of acceptance	- CIO
Functional Requirements Specifications Document	Technical Team Lead and SMEs and QA Analysts	Must use PKI program template for FRS	- Steering Committee Project Sponsor
System Install	Implementation Team	Systems will be deployed previously in DEV, TEST and QUAL equivalents and finally to production. Once tested users will indicate successful release verbally and recorded in project plan by project manager. (Each environment having its respective check off point)	- Steering Committee Project Sponsor

Code Release	Implementation Team	Code will be deployed previously in DEV, TEST and QUAL equivalents and finally to production. Once tested users will indicate successful release verbally and recorded in project plan by project manager. (Each environment having its respective check off point)	- Steering Committee Project Sponsor
Project Status Report	Project Manager(s)	adheres to project status report template	- Project Manager(s)
Executive Leadership Review	Executive Leadership	adheres to executive leadership status report template	- Project Manager(s)

5.4 Milestones

Essential dates throughout the project timeline that serve as check points to gauge overall project timeliness shall be measured and observed to set target dates for the implementation team. The major milestones include the below.

Milestone	Complete by Date
Stakeholders Identified	October, 2011
Communication Plan Established	October, 2011
SOW Complete	November, 2011
RFP Complete	December, 2011

Vendor Selection Complete	January, 2012
Project Kick-Off	January, 2012
Requirements Complete	March, 2012
Design Complete	April, 2012
Functional Specifications Complete	May, 2012
System Installed	June, 2012
Development Complete	August, 2012
User Acceptance	October, 2012
Training Complete	December, 2012
Project go-live and completion	December, 2012

6.0 Work Approach

- *Describe how the work is to be performed – if a formal methodology will be used, provide a concise description here. (e.g. “This project will use the PMBOK based methodology.) Also, for larger projects, indicate if the project will be tracked by the Organization’s Project Management Office (PMO)*

7.0 Completion Criteria and Final Acceptance Criteria ...N/A

(For Assignments 1 and 2, MMI 408 Students are to think about this Section 7, but we will not cover the concept of Acceptance Testing until later in the course, so do not include this section in your Assignments 1 or 2 deliverables.)

7.1 Completion Criteria

- *The focus of this section is to define the process for submitting, approving and rejecting tasks and deliverables*

7.2 Final Acceptance

- *Describe in detail the precise definition of the conditions and criteria that will be applied to determine that the contract has been successfully completed*

8.0 Schedule

- *Dates of the Contractor's key tasks or completion of the major elements of the project*
- *Identify interim quality gate milestones-these are decision points where the project can be stopped or approved to go forward*

9.0 Project Management (if applicable)

Describe what will be required as far as project management, which reports will be required and what must be submitted to the Organization or Project Management Office.

10.0 Relevant Organizational Policies Standards, Supported Software and Computing Environment

11.0 Timeline and Period of Performance

Outline the dates of Contractor's key tasks or submission of product or service.

The period of performance for this project will start on *[start date]* and the work tasks are estimated to continue through *[end date]*. The Organization has the right to extend or terminate this SOW at its sole discretion.

12.0 Compensation and Payment Schedule

- *Compensation/Payment should be tied to completed tasks/deliverables that have been approved by the Organization. Require invoices to list task ID, hours, deliverables and resource roles that are being billed for*
- *List detail of compensation to be paid, e.g., hourly rates, number of hours per task, unit prices, cost per task, cost per deliverable, etc*

- *Make it clear that the tasks and deliverables detailed in the invoice require the approval and sign-off by the Organization project manager prior to payment of the invoice*
- *If Contractor will be reimbursed for any other expenses, describe them and any cost limits in this section*
- *Organization shall pay Contractor an amount not to exceed [_____] dollars (\$___) [specify maximum dollar amount if there is one] for the performance of all activities necessary for or incidental to the performance of work as set forth in this SOW. See the template guidelines for suggested language on different types of compensation language. Consider a holdback to ensure project completion*
- *Expenses are optional. Travel costs are the most common reimbursable expense. If no travel is expected, insert a statement to that effect, e.g. “All activities are expected to take place in the greater (fill in location) area, thus no travel expenses are expected or authorized.” If Organization agrees to reimburse travel costs, include the following language.*

Organization shall reimburse Contractor for travel and other expenses as identified in this SOW, or as authorized in writing, in advance by Organization. No payment of travel expenses will be made to Contractor for routine travel to and from Organization’s location. Contractor shall provide a detailed itemization of expenses as requested by Organization. The amount reimbursed to Contractor is included in calculating the “not to exceed” amount specified above.

13.0 Miscellaneous

Describe any items unique to the project such as:

- *Standards to be used including hardware, software and technical architecture*
- *Travel and accommodations*
- *Support personnel*
- *Shipping, handling and packaging*
- *Conflict resolution agreement*
- *Service level agreements*
- *Acceptance testing*
- *Performance standards*
- *Other*

14.0 Appendices

For example:

- Appendix A: *Contractor's hardware and software*
- Appendix B: *Change control procedure*
- Appendix C: *Resource Documents*
- Appendix D: *Policies and Standards*
- Appendix F: Pricing Matrix
- Appendix F: *Contractors Project Management Methodology*
- *Others.*

If additional sections are required for your specific project, please add your new sections here as

15.0, 16.0 etc.

Execution/Signature Blocks

In Witness Whereof, the parties hereto, having read this SOW for *[Project Name]* in its entirety, do agree thereto in each and every particular.

SO AGREED.

SO AGREED.

[Organization]

[Contractor]

Signature

Signature

Print or Type Name

Print or Type Name

Title:

Title:

Date:

Date:

[Use this space for other applicable Organization signatures]