For instructions on using this template, please see Notes to Author/Template Instructions on page 25. Notes on accessibility: This template has been tested and is best accessible with JAWS 11.0 or higher. For questions about using this template and To request changes to the template, please contact [CMS IT Governance](mailto:IT_Governance@cms.hhs.gov) ([IT\_Governance@cms.hhs.gov](mailto:IT_Governance@cms.hhs.gov)).

|  | Centers for Medicare & Medicaid Services |
| --- | --- |

<Project Name / Acronym>

Performance Measurement Plan

Version X.X

MM/DD/YYYY

**Document Number:** <document’s configuration item control number>

**Contract Number:** <current contract number of company maintaining document>

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# Introduction

Instructions: Summarize the purpose of the document, the scope of activities that resulted in its development, the intended audience for the document, and expected evolution of the document. Also describe any security or privacy considerations associated with use of the Performance Measurement Plan.

# Overview

Instructions: Provide a high-level overview of the project. Focus on the process and deliverable aspects of the project, including contract type, major milestones, and stakeholders.

# Assumptions/Constraints/Risks

## Assumptions

Instructions: Describe any assumptions or dependencies regarding the project that impact this Performance Measurement Plan.

## Constraints

Instructions: Describe any limitations or constraints that have a significant impact on this Performance Measurement Plan.

## Risks

Instructions: Describe any risks associated with the content of this Performance Measurement Plan and proposed mitigation strategies. Remember to include any identified risks in the project’s Risk Report.

# Performance Measurement Approach

## Objectives & Standards

Instructions: Identify and prioritize the performance measurement goals and objectives to align with the information needs of the customer, project, organization, and stakeholders, as applicable. Include a definition of the measurements needed to meet the project goals and requirements. Measures may be categorized as general project, release-based, etc. Identify the performance measurement standards for project processes (e.g., product functionality, regulatory compliance, project deliverables, project management performance, documentation, testing, etc.), and describe how they will be satisfied. For each measurement, provide additional descriptor information using a table similar to the one provided in Appendix A – Performance Measure Details. Include a reference here to the appendix. The following table provides some initial examples that may be modified as necessary or deleted if not applicable.

Table : Traceability of Information Needs to Measurement Objectives

| Information Need | Measurement Objective | Performance Measure (Threshold) |
| --- | --- | --- |
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## Methods & Tools

Instructions: Describe the methods, processes, tools and techniques that will be used for performance measurement, and how they will integrate with other project processes (e.g., contract management, staffing management, communication management, decision analysis and resolution, cost management, subcontractor management, project monitoring and control, risk management, etc.). As appropriate, refer to the Project Management Plan (PMP) and/or any applicable subordinate plans that may exist (e.g., Staffing Management Plan, Communication Management Plan, Subcontractor Management Plan, Configuration Management Plan, Risk Management Plan, etc.)

Table : Performance Measurement Processes

| Process | Tools & Techniques |
| --- | --- |
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## Roles & Responsibilities

Instructions: Identify key personnel responsible for performance measurement and describe their responsibilities.

Table : Roles & Responsibilities

| Name | Role | Responsibility |
| --- | --- | --- |
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# Time-Phased Plan

Instructions: Describe the time-phased plan against which project performance is measured, including Earned Value Management (EVM) requirements.

# Data Collection & Storage

Instructions: Describe the data that will be collected, how it will be collected, and where it will be stored.

Table : Data Collection & Storage

| Data Description | Collection Method | Storage Location |
| --- | --- | --- |
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# Analysis

Instructions: Describe the approach for analyzing the data collected (e.g., threshold analysis, causal analysis, Pareto analysis, statistical analysis). This should include a review of the data to identify trends and opportunities for improvements and corrective actions.

# Reporting

Instructions: Describe what information will be used for reporting and at what levels. The reporting levels should be at a low-enough level to support effective management of the key performance elements. Also identify the frequency that the information will be reported and the method(s) used to report the information.

The <Project Name or Acronym> will report metrics at the following levels to ensure optimal control of key performance objectives:

# Deficiencies

Instructions: Describe the approach for identifying and addressing deficiencies.

1. Record of Changes

*Instructions: Provide information on how the development and distribution of the Performance Measurement Plan will be controlled and tracked. Use the table below to provide the version number, the date of the version, the author/owner of the version, and a brief description of the reason for creating the revised version.*

Table 5: Record of Changes

| Version  Number | Date | Author/Owner | Description of Change |
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1. Acronyms

Instructions: Provide a list of acronyms and associated literal translations used within the document. List the acronyms in alphabetical order using a tabular format as depicted below.

Table 6: Acronyms

| Acronym | Literal Translation |
| --- | --- |
| **CMS** | Centers for Medicare & Medicaid Services |
| **EVM** | Earned Value Management |
| **PMP** | Project Management Plan |
| **SDMP** | System Development Management Plan |
|  |  |

1. Glossary

Instructions: Provide clear and concise definitions for terms used in this document that may be unfamiliar to readers of the document. Terms are to be listed in alphabetical order.

Table 7: Glossary

| Term | Definition |
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1. Referenced Documents

Instructions: Summarize the relationship of this document to other relevant documents. Provide identifying information for all documents used to arrive at and/or referenced within this document (e.g., related and/or companion documents, prerequisite documents, relevant technical documentation, etc.).

Table 8: Referenced Documents

| Document Name | Document Location and/or URL | Issuance Date |
| --- | --- | --- |
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1. Approvals

The undersigned acknowledge that they have reviewed the Performance Measurement Plan and agree with the information presented within this document. Changes to this Performance Measurement Planwill be coordinated with, and approved by, the undersigned, or their designated representatives.

*Instructions: List the individuals whose signatures are desired. Examples of such individuals are Business Owner, Project Manager (if identified), and any appropriate stakeholders. Add additional lines for signature as necessary.*

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| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
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1. Notes to the Author / Template Instructions

This document is a template for creating a Performance Measurement Plan for a given investment or project. The final document should be delivered in an electronically searchable format. The Performance Measurement Plan should stand on its own with all elements explained and acronyms spelled out for reader/reviewers, including reviewers outside CMS who may not be familiar with CMS projects and investments.

This template includes instructions, boilerplate text, and fields. The developer should note that:

* *Each section provides instructions or describes the intent, assumptions, and context for content included in that section. Instructional text appears in blue italicized font throughout this template.*
* *Instructional text in each section should be replaced with information specific to the particular investment.*
* *Some text and tables are provided as boilerplate examples of wording and formats that may be used or modified as appropriate.*

When using this template, follow these steps:

1. *Table captions and descriptions are to be placed centered, above the table.*
2. *Modify any boilerplate text, as appropriate, to your specific investment.*
3. *Do not delete any headings. If the heading is not applicable to the investment, enter “Not Applicable” under the heading.*
4. *All documents must be compliant with Section 508 requirements.*
5. *Figure captions and descriptions are to be placed centered, below the figure. All figures must have an associated tag providing appropriate alternative text for Section 508 compliance.*
6. *Delete this “Notes to the Author / Template Instructions” page and all instructions to the author before finalizing the initial draft of the document.*
7. Template Revision History

The following table records information regarding changes made to the template over time. To provide information about the controlling and tracking of this artifact, please refer to the Record of Changes section of this document.

Table 9: Template Revision History

| Version  Number | Date | Author/Owner | Description of Change |
| --- | --- | --- | --- |
| 1.0 | 07/29/2020 | Alex Smith  CMS/OIT/ICPG/DIIMP | Baseline document. |
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1. Additional Appendices

Instructions: Utilize additional appendices to facilitate ease of use and maintenance of the document.