



# VETERAN FOCUSED INTEGRATION PROCESS GUIDE 1.0

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**VA**



**U.S. Department of Veterans Affairs**  
Office of Information and Technology

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# 1 OVERVIEW

In an effort to prioritize increasing value to the veteran, information security, portfolio management, and continuous organizational learning and improvement within the Department of Veterans Affairs (VA), the Office of Information & Technology (OI&T) is implementing a new IT delivery framework that encompasses the portfolio/program/project levels.

The Veteran-focused Integration Process (VIP) is a Lean-Agile framework that services the interest of Veterans through the efficient streamlining of activities that occur within the enterprise.

VIP is the follow-on framework from Project Management Accountability System (PMAS) for the development and management of IT projects which will propel the Department with even more rigor toward Veteran-focused delivery of IT capabilities. The VIP framework unifies and streamlines IT delivery oversight and will deliver IT products more efficiently, securely and predictably. With VIP, VA takes another generational leap forward in its commitment to serve our nation's Veterans.

The Veteran-focused Integration Process (VIP) is the new project management process that will replace PMAS on January 1, 2016.

This guide describes VIP, how to use it effectively for project management, and the transition from PMAS to VIP.

## 1.1 Purpose

VIP has one overarching goal:

***“...to increase the speed of delivering high-quality, secure IT capabilities to the Veteran.”***

To achieve this goal, VIP enables a flexible project management process that allows VA to deliver usable and useful products centered on the needs of users, through more frequent releases.

## 1.2 Projects That Qualify for VIP

If an effort touches VA's network, or spends money from VA's Congressional IT Appropriation, the VIP framework is mandated for that work.

However, there are conditions within this spectrum that apply in different circumstances. Because one size does not fit all and different projects have different needs, VIP has built-in opportunities to appropriately tailor the requirements to the project.

### 1.3 Characteristics

VIP is a significant step forward for VA, allowing greatly needed IT services to be delivered to Veterans more frequently, via a three-month release cadence and a minimally invasive oversight process. It differs from PMAS in the following ways:

From (PMAS)	To (VIP)
58 Artifacts	Data Driven (7 Data Categories + ATO)
5 Phase Gates/ Milestones	2 Critical Decision Events
Multiple Release processes	1 integrated Release process
6 month delivery cycle	3 month delivery cycle
Ad-hoc hierarchy of programs and projects	Portfolio-based management
Waterfall	Agile
Security + Architecture late in the process	Security + Architecture standards leveraged during the planning phase
Project-centered (tactical)	Portfolio-centered (Strategic)

### 1.4 Principles

VIP is driven by and embodies the following six core principles:

#### **We prioritize the needs of Veterans and our users.**

By doing so, we ensure an outcome that meets their needs. The needs of users drive our decision making—not the needs of the agency, nor the personal preferences of leadership.

#### **We test early and often.**

We aim to get our product in front of users early and often. Testing throughout the development lifecycle is the best way to ensure the outcome will be useable and useful. Stakeholders will have opinions and ideas about how a product should look or work--and those thoughts will be considered. We test all ideas with users because they know their own needs best.

#### **We welcome change throughout development.**

Requirements that are discovered through development and testing are prioritized by the Product Team and Business/Product Owner in the Backlog.

#### **We work closely with all stakeholders.**

Success requires close collaboration across the team—from the Product Team and the Release Agent, to the Business Owner—we communicate early and often and make decisions transparently.

#### **We measure progress by delivery.**

We deliver a working product that is useful to and usable by the end-user (whether they are Veterans or VA employees) as the principal measure of progress. Documents do not equate to progress—progress is a working product that can be tested by users.

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## **We value simplicity.**

We do not create documentation for the sake of documentation, nor do we create complex processes when a simple one will suffice. We value trust and work in a principles-based manner, not a rules-based hierarchy. We do not answer the same questions multiple times in different formats. To work in an Agile manner, we must have clear and simple processes that avoid redundancy.

## **1.5 Priorities**

In accordance with the principles listed above, VIP is committed to the following institutional priorities:

### **User Satisfaction**

Our product is not successful unless it meets the needs of the user. To do so, it must be both useful and useable.

### **Security**

The first priority of OI&T remains the safety and security of Veteran data. Security is not just a check-point or a document—it is ingrained in the development process by the Product Team from the beginning. Security requirements are laid out at the start of the project, addressed throughout development, and confirmed and tested before the product is placed into production.

### **Portfolio Approach**

By transitioning from a project-based to a portfolio-based structure, VIP enables projects and their Product Teams to operate within a framework that works for products like theirs. Grouping similar products into portfolios will ensure more effective management of resources and allow for a portfolio-level focus on things like release processes and risk management. This structure will also enable more effective sharing of trends and patterns for success. Due to shifting to this approach, Integrated Product Teams will not be necessary.

### **Accountability and Transparency**

VIP measures accountability through data-driven metrics and simplified approval processes. Data is made available at the portfolio/program/project levels.

### **Continuous Improvement**

VIP is committed to continuous learning and evaluations. VIP allows VA to gather lessons learned by taking an analytical view at both successes and failures and then sharing these opportunities for improvement with the enterprise. In addition, VIP will re-evaluate its processes continuously to ensure they stay lean. VIP will focus on what we *must* do from an oversight perspective, not what we could do.

## **1.6 VIP Roles and Responsibilities**

Successful outcomes require the right Product Team, an awareness of roles and responsibilities and a clear understanding of (1) the problem, (2) user needs and (3) the needs of all stakeholders required. While roles and responsibilities may vary from project to project, the following key roles are included in VIP:

### **Product/Project Team**

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**The Product/Project Team is the** team that designs, develops and delivers the product. It is led by an IT Project Manager, who is responsible for delivering a useful and usable product on time, on budget and in scope to the Business Owner (see below). They keep the project on track, define project goals and scope, track reporting requirements and ensure delivery.

Depending on the product and project goals, the Project Lead should assemble a team that includes the right set of skills for successful delivery. Assembly of this team can occur from portfolio resources, other VA resources or resources acquired via a contract award.

### **Program Manager**

Programs are a limited collection of similar projects, delivering similar focused work, generally for similar Business Owners. From a project/product perspective, the Program Manager is the first line of defense and relief.

The Program Manager is responsible for defining and prioritizing the Program Backlog – the single backlog that drives the Product/Project Team delivery. This role works with the Portfolio Manager to understand objectives, budget, portfolio, and program requirements.

### **Portfolio Manager**

The Portfolio Manager manages a larger grouping of work of similar projects/products which are organized into Programs. The Portfolio Manager creates and manages the framework in which her/his programs operate. He or she is responsible for creating an environment in which the programs within the portfolio can be successfully delivered and for ensuring the needs of the user and Veteran are addressed at the Portfolio level. To do so, this individual must have a close working relationship with his or her Program Managers, understanding what they need to succeed and advocating for them within the larger VIP and OI&T context.

Portfolio managers are responsible for ensuring that the projects within their portfolios are:

- Using VIP effectively and efficiently
- Delivering on-time, on-budget and in-scope
- Tracking and delivering reporting requirements
- Delivering a product that meets the needs of users

A successful Portfolio Manager will be viewed by Project Leads as their advocate who creates an environment that positions them for success. The Portfolio Manager understands Agile methodology, the needs of the business, and the needs of the agency. The Portfolio Manager advocates for the needs of users and strives to meet the *intent* of VIP and other compliance measures.

### **Business/Product Owner**

This is the business office within the VA that sponsors the “solution” by expressing the requirement for the product. The Product Owner is the customer; but cannot be the user.

The Product Owner:

- Work with the Product Team to define project goals, scope, Epics, roles, priorities, etc.

- 
- Provide business requirements
  - Approve the Project Charter
  - Approve/accept the product

A successful and effective Product Owner will have ongoing contact with the Product Team, invest in understanding the needs of their users and take the stance of a “trust but verify” policy with respect to the operations of the Product Team. He or she (the Product Owner) will be a partner to the Product Team and someone who prioritizes the needs of their users above all.

### **Account Manager**

The Account Manager collaborates with the business units to understand the business needs. The Account Manager is responsible for coordinating with the business/Product Owner to create new VIPR requests and for submitting them to the Portfolio for review. He or she also work with the Portfolio Manager to triage the requests and further define the requirements.

### **Release Agent**

A Release Agent is assigned to each planned release to monitor the Project Team's input of required data into the Rational tool (see Section 3.4). Throughout the development/build phase, the Release Agent provides continuous feedback to the Project Team concerning the quality and completeness of the data. This feedback enables the Project Team to address any deficiencies as quickly as possible. Prior to Critical Decision #2, the Release Agent ensures that the Portfolio Manager, the Business/Product Owner and the Receiving Organization's Representative have the most up-to-date picture of the quality and completeness of the release candidate. To do so, the Release Agent will provide continuous feedback to the Project Manager concerning the status of the product data in the repository.

### **Users**

The Users are the individuals and groups who will ultimately use the product. It is the responsibility of both the Business Owner and the Product Team to define who the users are and to include them throughout the process. There can be multiple users—all of whom must be identified and included in the development process.

Agile development enables teams to expose the product to users early and often, throughout the development lifecycle. As often as possible, when it comes to functionality and design, user testing should guide how decisions are made. The success of a product is defined by its ability to meet the needs of user(s).

## **1.7 VIP Discriminators**

Portfolio managers can tailor VIP data requirements to accommodate a specific body of work. The table below offers guidelines on how projects should be analyzed to determine if there are VIP process steps that can be bypassed.



In rare instances, primarily for high-risk/high-visibility projects, Portfolio Managers can add additional required data they deem necessary beyond the core set of required artifacts. This is only if it is determined to be in the best interest of the VA enterprise to hold the project to additional scrutiny. This determination is made by the Portfolio Manager.

The following table offers guidelines to assist the Portfolio Manager in assessing a project's risk and visibility.

	Small	Medium	Large
<b>Security</b>	Existing ATO / FISMA Low	Existing ATO / FISMA Medium	New ATO / FISMA High
<b>Technical</b>	Standard epics exist	Most technical epics exist	Brand new epics needed
<b>Architecture</b>	Standard epics exist	Most technical epics exist	Brand new epics needed
<b>Business</b>	Fully known domain / functionality	Somewhat known domain / functionality	Unknown domain / functionality
<b>Organizational Familiarity</b>	Long term footprint in VA / strong staff familiarity	Limited	New technology, no staff familiarity
<b>Dependencies</b>	None	Minimal internal and/or external dependencies	Multiple internal and external dependencies
<b>Resources</b>	1-5 resources (Gov and contractor)	6-24 resources (Gov't and contractor)	Greater than 25 (Gov't/Contract)
<b>Time</b>	< 3 months	3-12 months	12-18 months
<b>Budget</b>	< \$1M	\$2M - \$9M	> \$10M
<b>Boundaries</b>	Local	Regional	Enterprise wide
<b>Agency Visibility / Risk (Congressional, Washington Post, IG, etc.)</b>	None	Limited interested parties	Multiple interested parties
<b>Domains</b>	Internal to VA	Minimal other Federal Agencies / Third Parties ("Control Domains")	Multiple other Federal Agencies / Third Parties ("Control Domains")

## 2 VIP LIFECYCLE

VIP creates a streamlined IT oversight process that further uses the Agile Project Management Methodology.

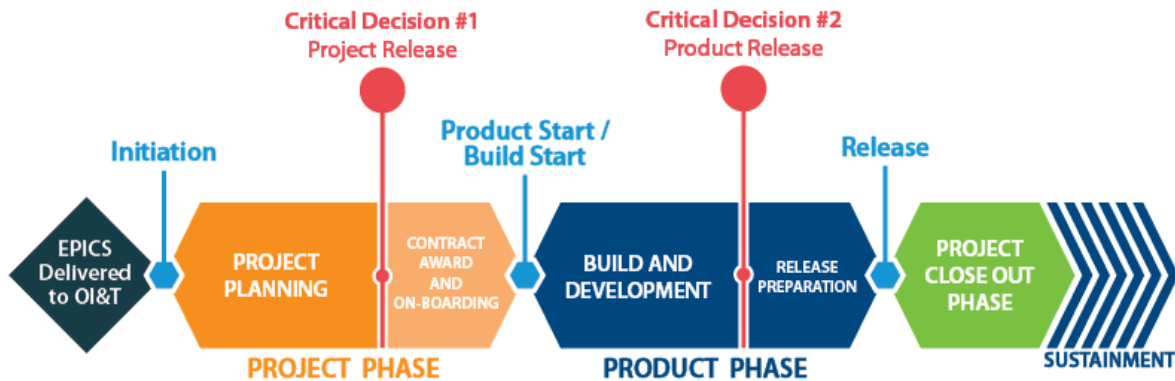
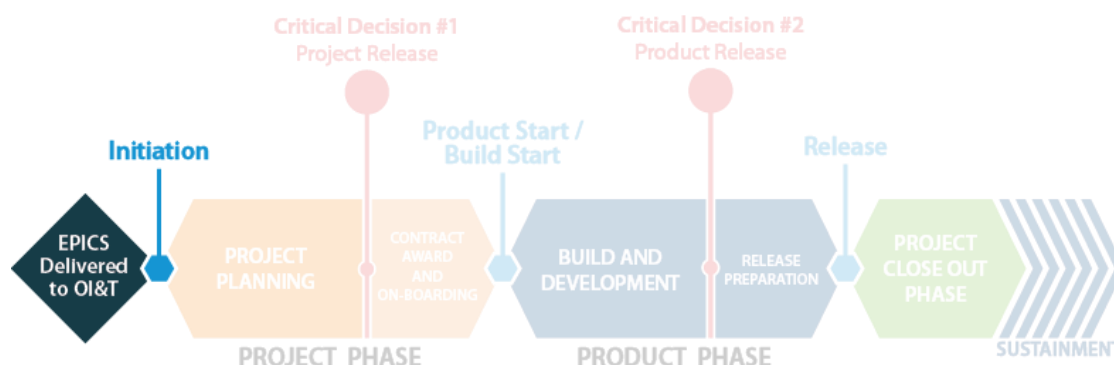


Figure 1: The VIP Lifecycle

The VIP lifecycle begins with Epics that define user needs and initiate the project-planning phase, forming the foundation of the project. Based on the outcomes of Project Planning, Critical Decision Point #1 determines whether the project will proceed into development. If acquisition or contract support is needed, this occurs before development starts. Development occurs in three-month increments, culminating in Critical Decision #2, which determines whether a product is prepared for release. Once this first release occurs, abbreviated Critical Decision #2 reviews can be held simply to ensure the proper requirements have been updated and the appropriate parties are prepared for the additional release(s). This positions the Product Team to release as rapidly as they are able until the end of the project.

The product is the solution, the project is the vehicle and VIP is the road it travels.

### 2.1 Intake and Initiation



**Figure 2: VIP Lifecycle – Intake and Initiation**

Intake and Initiation is the process through which OI&T absorbs the problem statement and starts to envision the designed solution. Before a project can be planned, it must first be clear what problem the project is trying to solve. The problem statement must be carefully crafted by the Business Owner in collaboration with the Account Manager and as applicable the Product Team. Defining the problem statement is one of the most critical parts of any product development process, as it defines all work that follows. The problem statement should be no longer than a paragraph written in plain, concise and customer-focused language.

Following the Agile methodology, requirements will now be expressed in terms of Epics and User Stories. Although artifacts are being rigorously streamlined, some data needs by OI&T still remain—these are also captured in Epics.

As the business requirements become clearer, a unique identifier is assigned at initiation. This allows the product to be tracked through the Release process and entered into the POLARIS Calendar.

OI&T's ability to remove certain review functions is dependent on data being entered once in online tools (VIPR, the Rational Tool Suite, etc.) and accessible as necessary by members of the portfolio or VIP team. As Epics are built — both for the Business Epics and the other supporting Epics (Architecture, Security, Data, Infrastructure, etc.) — they must be available for review.

Technical solutions should strive to:

- Fit the purpose
- Provide the appropriate level of security
- Minimize the need for introducing new technology solutions mid-flight
- Allow for rapid deployment

The business, security, and technical requirements should be inclusive of all hardware, software, development, environments, services and sustainment requirements necessary to create the capability. VA enterprise architecture standards and reference architectures will be leveraged at all times, unless an emerging requirement provides a need for new technology solution.

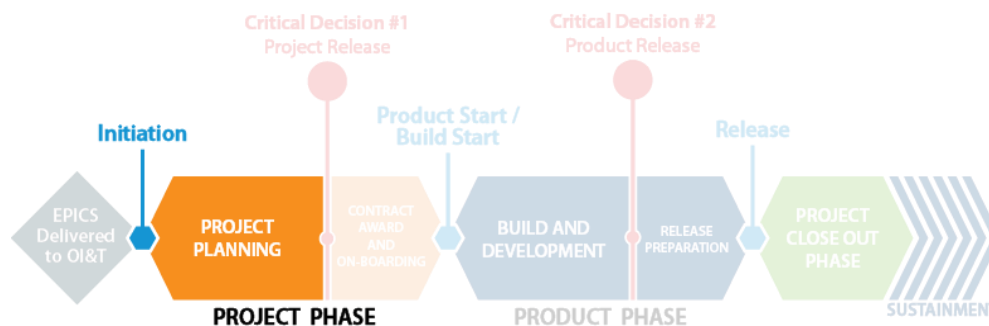


**Figure 3: Relationship of Epics to Solution**

## 2.2 Project Planning

The project planning phase is where planning continues to ensure the project is resourced correctly (people, contracts and budget) to successfully deliver the product. This includes specifying all Key Performance Indicators (KPIs), Operational Level Agreements (OLAs) and Service Level Agreements (SLAs). At the conclusion of the project planning, Critical Decision Point #1 can be executed.

Additionally, in the project planning phase, a Release Agent is assigned to monitor the release. The Release Agent's role is to enhance the likelihood of a successful release by providing information to the Project Team concerning appropriate product data to be generated and uploaded to the repositories. Projects will also determine if they are using the Initial Operating Capability (IOC) construct for implementation. It is at this phase that the project enters their expected release(s) on the POLARIS Unified Calendar.



**Figure 4: VIP Lifecycle – Project Planning Phase**

## 2.3 Critical Decision #1

Critical Decision Point #1 is the moment when a project is approved to start working to deliver the product to the Customer. The approval is given by the Portfolio Manager, the Business/Product Owner and the Receiving Organization at a Critical Decision #1 board of review event.

By Critical Decision #1, a project should have its scope, schedule, resources and acquisitions planned, along with any risks identified, funding secured, and a completed PWS. The effort retains its VIPR unique request number for the Calendaring and Release processes. Projects should have been reviewed by their Program Manager prior to the Critical Decision #1 review event, but this is at the discretion of the Program Manager.

## 2.4 Contract Award and On-Boarding

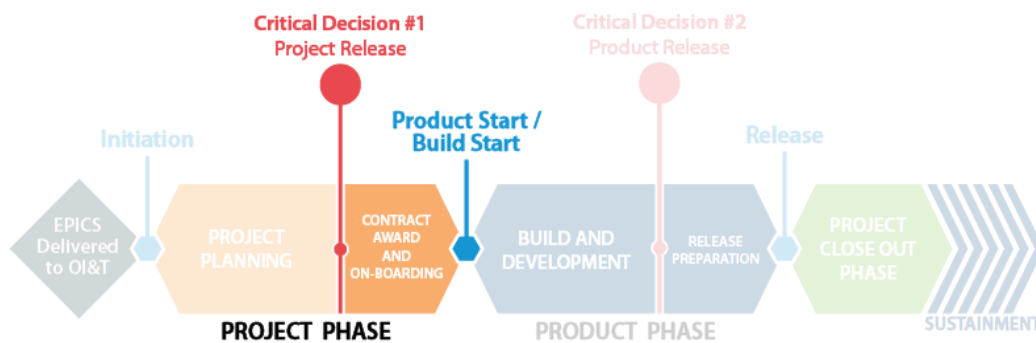


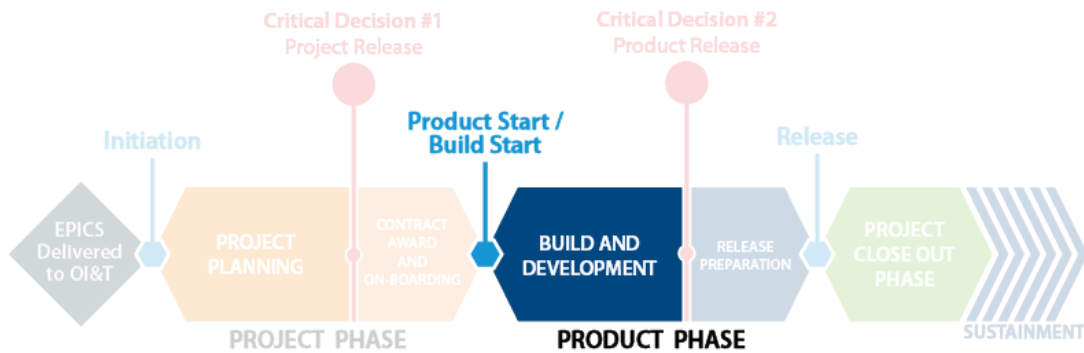
Figure 5: VIP Lifecycle – Contract Award and Onboarding

This phase is necessary only if the product requires an acquisition and/or contract support. During this phase, the Product Team should work closely with the TAC to ensure that the PWS is written in an Agile manner and that enables an Agile, user-centered development process.

## 2.5 Product Start and Build Start

Projects are expected to be in the Product Phase for no longer than 18 months with three-month development cycles. In VIP, a development cycle is called a **build**. Builds are not to exceed three months.

The length of a project, and whether or not it is delivered “on-time”, is determined by the amount of time from “Build Start” to “Release.”

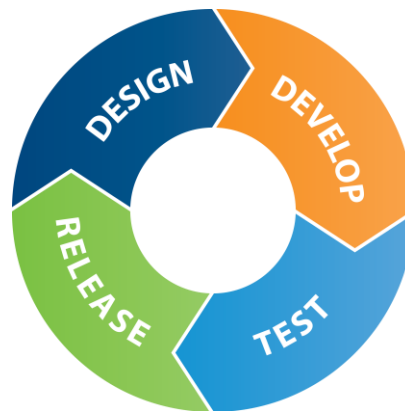


**Figure 6: VIP Lifecycle – Product Start and Build Start**

## 2.6 Build and Development

Each build ends with a new release/push to production. While each build is not to exceed three months, it is not required to take three months. VIP provides a flexible development framework in which Agile teams can release as rapidly as they are capable. The frequency and content of sprint cycles (“the backlog”) will be prioritized and managed by the Product Team in collaboration with the Business Owner.

Regardless of the length of the cycle, as determined by the Product Team, everyone will follow the standard development cycle:



**Figure 7: Build Development Cycle**

## 2.7 Critical Decision #2

Critical Decision Point #2 confirms that the product is ready for release and addresses all relevant compliance requirements. This decision point should answer the following questions:

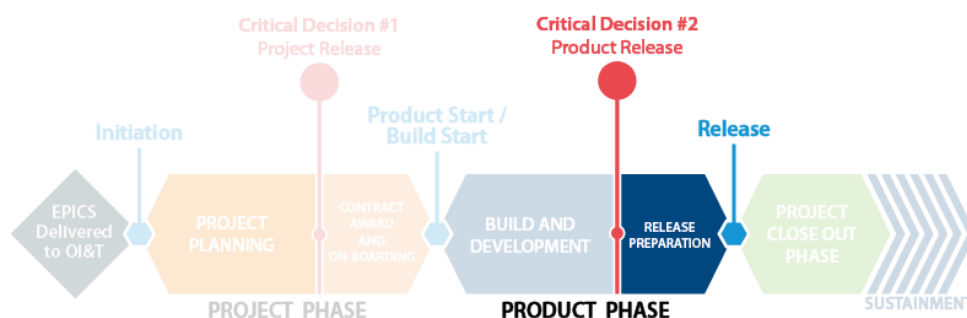
- What are the systems this product touches and is it compatible with all of them?
- Who are the stakeholders and teams directly affected by this new product and are they aware?
- Will it bring down the VA system?

- Will it bring down the VA network?
- Is it load-tested?
- Is it secure?
- Is it 508-compliant?

The Portfolio Manager, Receiving Organization and Business/Product Owner approve the product for release.

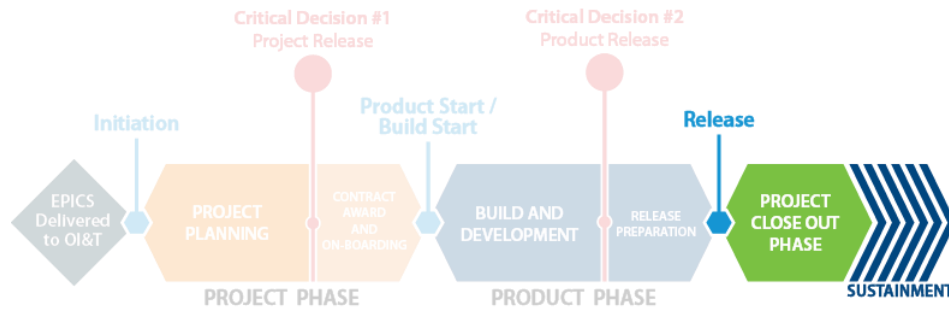
This decision point reviews the full product and if nothing significant changes in the product's technical environment or security profile, approvals are not required for future releases. This means the only release that requires a full Critical Decision #2 review is the first release. Once this first release occurs, abbreviated Critical Decision #2 reviews may be held simply to ensure the proper requirements have been updated and the appropriate parties are prepared for the additional release(s).

If a product is using the IOC implementation model, Critical Decision #2 approval means that the product is approved to begin implementation at the first IOC test site. Upon successful completion of IOC, the Release team must be notified. In addition, the Portfolio Manager, Business/Product Owner and Receiving Organization may need to approve the IOC release for further implementation.



**Figure 8: VIP Lifecycle – Critical Decision Point #2**

## 2.8 Release Preparation and Release



**Figure 9: VIP Lifecycle – Release Preparation and Close Out**

The period of time after Release approval is given and when the actual release occurs is expected to be of a short duration. The types of activities in this phase are things like preparing final release communications, making final environment updates if necessary and finalizing site logistics.

## 2.9 Project Close

A critical element of VIP is that core members of the project team will now stay assigned to their projects for at least 90 days after the final Build release is completed. The specific team members which must stay assigned are determined by the Portfolio Manager and Receiving Organization. This is to ensure that core team members are available to mitigate any discovered development defects and can readily address these defects in the software before final turn-over to the sustaining organization.

# 3 VIP Reporting and Tools

## 3.1 VIP Central Repository

VIP will have a central repository where the most current copy of the VIP Guide can be found, along with templates and other applicable data collection tools.

## 3.2 VIP Dashboard

The PMAS Dashboard is being restructured into the VIP Dashboard. Data entry requirements from the PMAS Dashboard will be analyzed and reduced to the least amount needed to ensure our reporting requirements can be met and KPIs generated. In addition, data fields will be analyzed to ensure that duplicate data entry is eliminated.

### 3.2.1 External Reporting Requirements



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VA has several external reporting commitments which we must continue to meet. These take the form of ad hoc reports (generated from the PMAS Dashboard) for various external customers like the Government Accountability Office, the Inspector General, etc.

In addition to these ad hoc reporting responsibilities, there is a major reporting responsibility known as the Monthly OMB 300B Submission that must be completed every month. OMB requires agencies to submit project data (approximately 40 data elements per project activity) from the Agency directly to the OMB Federal IT Dashboard via XML transfer. This functionality is currently provided by the PMAS Dashboard, which collects and sends these data elements to OMB. The ability to meet our monthly 300B reporting requirements will still be met by VA via the VIP Dashboard.

### **3.3 Rational Tools Suite**

Critical to the success of VIP, as well as the thorough streamlining of release processes, is the mandatory use of the Rational Tool Suite. Teams must use Rational and fully populate the tool with all required project and product information. The Rational Tool Suite allows data to be entered once and then reused multiple times as “data views” utilized by various Rational users. Use of RTC supports one of the goals of VIP, which is to enter data once and reuse it many times as necessary.

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## 4 Managing a Project with VIP

### 4.1 Agile Implementation – What You Need to Know

Scrum, the preferred VA Agile framework, is a simple set of principles and practices that help teams deliver products in short cycles, enabling fast feedback, continuous improvement, and rapid adaptation to change.

Each Agile Team is responsible for delivering user stories from their backlog using a common sprint cadence and coordination to align with other teams within the Project or Program. Teams are to use Daily Scrums to monitor work progress and impediments. Scrum of Scrums are used to keep management informed and request assistance resolving impediments at both the Program and Portfolio levels. The teams deliver working products in short time-boxed sprints for two to four weeks. During Sprint Planning, prioritized functionality is committed to be delivered during the upcoming Sprint. During Sprint execution, product is built and tested. At the Sprint Review product is demonstrated to the stakeholders and accepted by Business/Product Owners. The process is repeated for the next sprint.

The Product Team should be cross-functional containing all skills to deliver a product.

VIP provides a more flexible development framework in which Agile development can occur at the speed that the Product Team is able to deliver—at most, in three-month increments.

Embracing Agile development means:

- **We prioritize the needs of our users.** By doing so, we will ensure an outcome that meets their needs. The needs of users drive our decisions—not the needs of the agency, or the personal preferences of leadership.
- **We validate hypotheses about product design or functionality through user-testing.** We will consider that stakeholders have opinions and ideas about how a product should look or work, but all ideas will be tested with users because they best know their own needs.
- **We aim to get our product in front of users early and often.** Testing throughout the development of a product is the only way to ensure the outcome will be useable and useful.
- **We welcome new needs and ideas throughout development.** Needs that are discovered throughout development and testing should be prioritized by the Product Team and Business Owner in the Backlog.
- **We work daily with the Product Team and Business Owner.** Daily SCRUM meetings ensure we are aligned as a team. Team members will be prepared to state what they've accomplished since the last SCRUM, what they're working on that day and if they face any impediments.
- **We deliver a working product as the principal measure of progress.** Frequent delivery (not to exceed three months) of secure, tested code is our main measurement of success.
- **We value simplicity.** We do not create documentation for the sake of documentation, nor do we create complex processes when a simple one will suffice. To work in an Agile manner we have clear and simple processes and avoid redundancy.

In order to support this shift, here's a guide to Agile terminology with some "plain language" translations:

Agile Terminology	What It Means...
<b>Backlog</b>	Scope of work needed to address user needs, including business, technical and architectural functionality
<b>Build</b>	The measurable period of time to deliver functionality—maximum length is three months
<b>Build Plan</b>	The prioritized list of functionality that will be delivered in a three month build
<b>Epic</b>	A large customer-facing initiative that can be broken down into multiple user stories
<b>User Story</b>	High level definition of a requirement
<b>Daily Scrum</b>	Daily 15-minute meeting for the team members to communicate progress by answering three questions, including: <ol style="list-style-type: none"><li>1. What did you accomplish yesterday?</li><li>2. What will you accomplish today?</li><li>3. Do you have any impediments?</li></ol>
<b>Scrum of Scrums</b>	Cross-team meeting to communicate progress; follows the same format as the Daily Scrum
<b>Grooming</b>	Reviewing, adjusting and reprioritizing a backlog to ensure the customer's highest priorities are continually being met
<b>Sprint</b>	A regular work cycle that is typically 2-4 weeks in length
<b>Sprint Plan</b>	A prioritized list of work a team commits to completing during a Sprint
<b>Sprint Review</b>	A review of the output and product at the end of a Sprint to ensure customer acceptance
<b>Critical Decision (CD) Events</b>	Two coordinated OI&T review points within the VIP framework that determine if a project is ready to move forward
<b>Integrated Release Process</b>	One unified release process

## 4.2 Required Artifacts

Through the implementation of VIP, OI&T has taken the lead in shifting its workforce from "documenting" to "doing." VIP allows VA to transition into a high trust/high ownership environment and shifts the focus of work from documentation to testing software.

Along with VIP's new unified release process and the management efficiencies which come from the Agile and project/program/portfolio construct, OI&T can securely allow a significant reduction in required documentation. Below is the required documentation for each Critical Decision. The list represents the core minimum set of data required (exclusive of security and 508 requirements). In most cases, this is also the maximum amount of

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artifacts. However, VIP is tailorable, so at the discretion of the Portfolio Manager, data/artifact requirements can be added to this list.

### Critical Decision One

Requirements (Epics, Sub-Epics and User Stories)
A signed Project Charter
A Project Management Plan (PMP) including Risk Log
A Financial Management Plan (FMP)

### Critical Decision Two

Traceability (requirements to test cases)/Test Execution/Test Results/Defect Log – entered directly into the repositories
Version Description Document (VDD)
Production Operations Manual/Technical Manual (VistA), including Deployment, Installation, Back-out, Rollback Plan, RACI (if extensive deviations required), Troubleshooting Information, Process Flowcharts, and Key Monitoring Indicators
Authority to Operate (ATO) including Contracts/Licensing/SLAs /OLAs

## 4.3 VIP Governance Process

VIP creates an environment capable of delivering more frequent releases through a deeper embrace of Agile practices, which are captured in one integrated development and release process. It is a revolutionary change focused on the Veteran, not the historical siloed way we've done business at OI&T. Through reducing oversight to the minimum necessary and separating what must we do from what should we do, VIP is now the *single* authoritative process that IT projects must follow to ensure development and delivery of IT products.

To this end, OI&T oversight processes have been modified to fit the VIP framework, exclusive of 508 and Security/Authority to Operate. A governance structure is also established whereby the Deputy Assistant Secretary for the Enterprise Program Management Office (DAS EPMO) is the *only* approval authority to allow any changes, additions or modifications to VIP. No additional oversight requirements can be levied upon the Portfolio Managers without the DAS EPMO's explicit approval.

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A governance board will guide/advise the DAS EPMO as to recommended changes to VIP which may arise in the future. Any changes will be evaluated against the risk of not adding the additional process step versus the value/benefits the new process step could contribute to the enterprise.

By establishing this governance, OI&T is ensuring the VIP process remains as streamlined and nimble as possible.

This governance approach/process is applicable from VIP's effective date of 1 January 2016, even though the full enterprise transition into VIP will take several months.

#### **4.4 VIP Issue Escalation Process**

VIP relies heavily on the project/program/portfolio hierarchical construct for organizing and managing VA's IT capability delivery. This means that like work is affiliated with like work, from smaller to larger groupings of the work (i.e. a project is a sub-element of a program and programs are sub-elements of portfolios). Resources assigned in this construct include Project Managers to projects, Program Managers to programs and Portfolio Managers to portfolios.

Given the shortened release cycles in VIP, it is vitally important that team members, managers and stakeholders are made aware of impediments in a timely manner so that they can act swiftly to remove or mitigate them. VIP relies on Scrum Masters and Project Managers at the Project Team level to work on resolving impediments as soon as they are discovered, usually as a result of the daily scrum. If they are unable to remove an impediment, then the Project should escalate it to the Program level at the Scrum of Scrums.

The Program Managers and Business/Product Owners are responsible for removing impediments at the Program level. If they are unable to do so or if the impediment requires action at a higher level, then they should escalate it to the Portfolio level via the Portfolio Level Scrum of Scrums.

The Portfolio Managers and Account Managers are responsible for removing impediments at the Portfolio level. If they are unable to do so, then they should escalate it to the executives within VA who are in a position to make decisions that can remove or mitigate the impediment. The elevation of risk through this construct should take no longer than one week.

VIP is designed to encourage participants at all levels to take charge of issues and resolve them amongst themselves whenever possible. It is expected that escalation beyond the Portfolio level or the use of Red Flags will rarely be needed.

VIP will still provide a tool for Portfolio Managers to get near-immediate attention to--and resolution of--issues which were unable to be successfully mitigated at the portfolio level.

The expectation is that as the project/program/portfolio organizational construct becomes ingrained in VA, the risk management process provided through this hierarchy will handle the preponderance of risk mitigation.

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In order for the enterprise to still benefit from lessons learned, Portfolio Managers will collect and categorize the risk raised in the portfolio. Categorization of risk raised at the project, program or portfolio level is the responsibility of the program and portfolio managers. The categories and definitions of the risk will be provided by the VIP Business Office (VBO). Until an automated tool can be implemented to automate this process, risk data and categorizations shall be provided quarterly to the VBO.

#### **4.5 Leveraging Lessons Learned from VIP / TechStats**

Another excellent source of lessons learned remains the deep dive dissection and analysis OI&T does of every delivery that misses its commitments. This activity will remain an element of VIP, as without it there is no data from which to identify areas for organizational improvement. These deep dive analysis sessions remain evidence-based accountability reviews of an IT project with agency leadership. The sessions are a tool for getting ahead of critical problems in a program/portfolio, turning around underperforming projects/programs, or terminating work as appropriate.

The VIP Business Office (VBO) will host all Deep Dive Analyses. They will be attended by the Project and Program Managers of the affected project. Categorizations of the reason the project missed its commitment will be done by the VBO. Summaries of each Deep Dive Analysis will be maintained by the VBO and provided to the CIO on a quarterly basis.

OI&T is striving to remain an evolving, learning organization with a rich source of data to continually renew itself and ensure consistent delivery of IT capabilities with an ever-increasing speed to delivery.

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## 5 Transitioning from PMAS to VIP

Transitioning projects from PMAS into VIP will be a careful and concerted effort. The effort will begin on January 1, 2016, with a small subset of projects. This pilot phase will run through 31 March 2016. During this time, any needed refinements to VIP will be made. Beginning on 1 April 2016, projects will then shift into VIP when they encounter one of the below conditions:

- Start of a new build
- Start of a new acquisition
- Start of a new Fiscal Year

It is VA's intent to have all projects transitioned into VIP by the end of FY2016. The full enterprise will managed with VIP beginning in FY2017.

There are two elements of particular importance to transitioning projects into VIP. The first is the implementation of the portfolio management construct and the second is that any required VIP acquisition language has been incorporated into contracts as necessary. Without both of these being implemented, transition to VIP may be limited.

# Appendix A – VIP Overview One-Pager

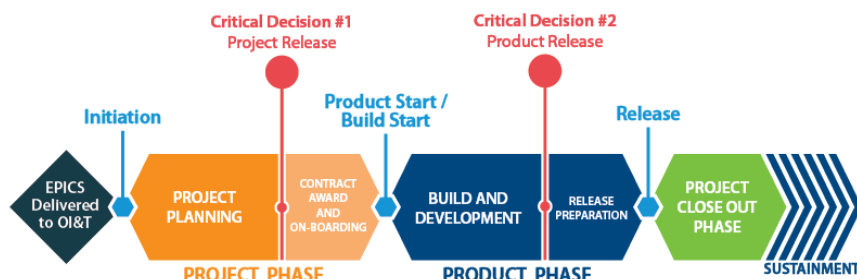
## Veteran-focused Integration Process (VIP) Fact Sheet

### VIP Overview

The Project Management Accountability System (PMAS) was VA's initial effort to facilitate on-time delivery of usable IT functionality to VA customers. Prior to PMAS, VA's on-time project delivery rate was approximated at 30 percent. Subsequent to implementing PMAS, VA has sustained an on-time delivery rate of 84%. However, even with these successes, well-engineered systems like PMAS demonstrate room for improvement.

The Veteran-focused Integration Process (VIP) is the follow-on framework for the development and management of IT projects which will overcome the gaps of PMAS and propel the Department with even more rigor toward Veteran-focused delivery of IT capabilities. The VIP framework unifies and streamlines IT delivery oversight and will deliver IT products more efficiently, securely and predictably. With VIP, VA takes another generational leap forward in its commitment to serve our nation's Veterans.

The VIP framework creates an environment delivering more frequent releases through a deeper application of Agile practices. In parallel with a single integrated release process, VIP will increase cross-organizational and business stakeholder engagement, provide greater visibility into projects, increase Agile adoption and institute a predictive delivery cadence.



### Transitioning to the VIP framework offers several benefits:

- Deliver capabilities to our Customers more frequently with a three month release cycle
- Bring OI&T closer to the full implementation of Agile across the enterprise
- Give more active roles to release oversight organizations by shifting away from document review and toward greater proactive involvement in the delivery process
- Keep the OI&T oversight process focused on security and FISMA compliance

### VA will retain practices which remain critical to successful delivery, such as:

- External reporting responsibilities (OMB 300Bs, on-time delivery statistics, etc.)
- FISMA compliance
- Risk management to resolve immediate obstacles toward achieving Veteran-focused delivery
- Opportunities to gather lessons learned

From (PMAS)	To (VIP)
58 Artifacts	Data Driven (7 Data Categories + ATO)



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5 Phase Gates/ Milestones	2 Critical Decision Events
Multiple Release processes	1 integrated Release process
6 month delivery cycle	3 month delivery cycle
Ad-hoc hierarchy of programs and projects	Portfolio-based management
Waterfall	Agile

# Appendix B – Agile Implementation One-Pager

## The Agile Framework in Simple Terms

As VA shifts from the Project Management Accountability System (PMAS) to the Veteran-focused Integration Process (VIP), one of the most important aspects of this transition is to determine what activity occurs at the project/program/portfolio level.

VIP provides the processes, practices, and guidance for delivering high-quality; secure IT capabilities through a deep embrace of Agile methodologies and principles. These principles include:

- Satisfying the customer through near-continuous delivery as the highest priority
- Welcoming changing requirements, even late in development
- Ensuring close, daily cooperation between business and IT team members
- Delivering working products as the principal measure of progress
- Valuing simplicity by maximizing the amount of work not done

In order to support this shift, the following table provides an overview of Agile terminology which includes “plain language” translations:

Agile Terminology	What It Means...
<b>Backlog</b>	Scope of work needed to address user needs, including business, technical and architectural functionality
<b>Build</b>	The measurable period of time to deliver functionality up to three months
<b>Build Plan</b>	The prioritized list of functionality that will be delivered in a three month build
<b>Epic</b>	A large customer-facing initiative that can be broken down into multiple user stories
<b>User Story</b>	High level definition of a requirement
<b>Daily Scrum</b>	Daily 15-minute meeting for the team members to communicate progress by answering three questions, including: <ol style="list-style-type: none"><li>1. What did you accomplish yesterday?</li><li>2. What will you accomplish today?</li><li>3. Do you have any impediments?</li></ol>
<b>Scrum of Scrums</b>	Cross-team meeting to communicate progress -using the same format as the Daily Scrum
<b>Grooming</b>	Reviewing, adjusting and reprioritizing a backlog to ensure the customer’s highest priorities are being met
<b>Sprint</b>	A regular work cycle that is typically 2-4 weeks in length

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<b>Sprint Plan</b>	A prioritized list of work a team commits to completing during a Sprint
<b>Sprint Review</b>	A review of the output and product at the end of a Sprint to ensure , customer acceptance
<b>Critical Decision (CD) Events</b>	Two coordinated OI&T review points within the VIP framework that determine if a project is ready to move forward
<b>Integrated Release Process</b>	One unified release process

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# Appendix C– The Evolution from PMAS to VIP

## VA OI&T Accountability and Oversight: 2009 – Today

### PMAS and its Evolution

Before 2007, each Department of Veterans Affairs (VA) administration managed its own information technology (IT) budget and portfolio of projects. This approach led to the development of stove-piped applications and solutions that were neither integrated nor optimized. So in 2007, to create a more effective means of managing IT development, Congress created a single budget authorization for all VA IT spending—and granted VA’s Chief Information Officer (CIO) sole budget authority over this appropriation. This act transformed the VA CIO into the most empowered IT leader in the Federal government and made the VA a more responsible steward of taxpayer dollars spent on IT.

Faced with the challenge of serving more than 22 million Veterans and their families, the CIO recognized the need for a framework that would help manage the new appropriation more efficiently. VA answered this need when it established the Project Management Accountability System (PMAS) framework in 2009. It created the framework for deploying and managing IT projects to improve VA’s IT on-time project delivery success rate.

The focus of PMAS was delivering usable IT functionality to VA customers. Projects were required to deliver a capability -- called an increment -- every six months or less. PMAS enforced process and development efficiencies, reduced resource waste and strengthened accountability in VA development efforts. Prior to 2009, VA’s on-time project delivery rate hovered around 30 percent. Subsequent to implementing PMAS, VA has had the structure, discipline and reporting capabilities to sustain an average on-time delivery rate of 84% for all increments and 98% for all commitments made to our customers.

However, even well-engineered systems have room to improve.

PMAS was indifferent to what type of delivery methodology was employed at the individual project level. While PMAS represents the first organizational shift toward embracing Agile processes, it did not enforce it aside from mandating delivery every six months or less. As long as projects met their commitment dates, PMAS practice did not require Agile methodologies pro se.

Additionally, PMAS did not replace any existing additional oversight processes levied onto IT projects by various IT organizations. In essence PMAS was additive to an oversight environment already abundant with processes and groups all making stove-piped demands for artifacts, process completion and attention from the IT PMs.

The Veteran-focused Integration Process (VIP) is the reimagined framework for the development and management of IT projects which will create a streamlined IT oversight process that further utilizes Agile processes, allowing VA to more effectively serve Veterans and its other customers. The VIP framework will deliver IT products more efficiently, securely and predictably. With VIP, VA takes another generational leap forward in its commitment to serve our nation’s Veterans.

### Revolutionizing IT Oversight with VIP

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The VIP framework creates an environment delivering more frequent releases through a deeper application of Agile practices. In parallel with a single integrated release process, VIP will increase cross-organizational and business stakeholder engagement, provide greater visibility into projects, increase Agile adoption and institute a predictive delivery cadence. By evolving to VIP, VA is creating an environment capable of delivering more frequent releases via a deeper embrace of Agile practices, captured in one integrated release process, and most importantly – focusing on the Veteran instead of the organizationally centered way we’ve previously released IT capabilities. VIP serves as both an accountability framework *and* a product delivery framework and allows VA to take another generational leap forward in its commitment to serve our nation’s Veterans.

***Transitioning to the VIP framework offers several benefits:***

- Keeps the OI&T oversight process focused on security and FISMA compliance
- Deliver capabilities to our Customers more frequently with a three month release cycle
- Bring OI&T closer to the full implementation of Agile across the enterprise
- Give more active roles to release oversight organizations by shifting away from document review and toward greater proactive involvement in the delivery process
- Distinguishes project by risk for applicability of certain activities (i.e. not one size fits all)

A summary of the evolution VA is undertaking with VIP includes:

From (PMAS)	To (VIP)
58 Artifacts	Data Driven (7 Data Categories + ATO)
5 Phase Gates/ Milestones	2 Critical Decision Events
Multiple Release processes	1 integrated Release process
6 month delivery cycle	3 month delivery cycle
Ad-hoc hierarchy of programs and projects	Portfolio-based management
Waterfall	Agile