### Introduction to TechStat

Agency Contact:

This email is formal notification that the <Agency> Investment Review Board, has begun conducting regular, consistent program review sessions, known as TechStat reviews, of agency IT investments. A TechStat review is designed to be a 60 minute, in-depth review of an agency investment and supporting program management documentation.  It can focus on one investment, a series of related investments or a functional area (HSPD-12, cybersecurity, etc.)

A TechStat Review can take on one of the following forms based on the IT investment lifecycle phase, including:

* Initial baseline review (investments in planning and development): To verify the technical content of the Performance Measurement Baseline, assess the estimates related to resource requirements and schedule and identify potential risks;
* Control Review (development and mixed lifecycle): To provide a systematic assessment of the investment’s current state and understand the risks and requirements that have arisen since the initiation of the investment; and
* Re-baseline Request Review (development and mixed lifecycle): To redefine the Performance Measurement Baseline of a given investment because of a significant change in project goals or the baseline is no longer useful as a management tool.

The purpose of a TechStat is to assess an investment’s planned/continued business impact, operations, execution path and technical implementation.  Please note that the IRB may make funding decisions in this meeting; however, a TechStat session will be used primarily to create corrective action plans.  The successful execution of these corrective action plans will then be used to inform the decision-making process for current and planned budgets for that investment.

It is expected that TechStat reviews will be open to Federal employees only.

The majority of the preparation for a TechStat review will be performed by the CIO’s TechStat Implementation Team.  The Investment Manager’s role is to provide full and complete documentation to support a given review, coordinate agency staffing needed to support a review, and implement action items and recovery plans resulting from TechStat reviews.

Feel free to contact <TechStat Team Member> at <Email Address> with any questions.

# **Invitation to TechStat**

Send as an invitation to all required and optional participants for the session

The <Agency> Investment Review Board requests your attendance for a TechStat project review of the <Investment Name> on <Date / Time>in the <Room Name/Number> of <Location>.

The intent of this meeting is to gain a shared understanding of the objectives of the project and understand the risks associated with continued investment.  The IRB requests to be briefed with your best understanding to date on the plan forward for the project with a focus on risk management, and future cost and schedule estimates.

<Specify security procedures and information needed for attendees to gain entry into the meeting room/building.>. Please note that only government employees will be allowed in the meeting (no contract staff will be permitted).

Feel free to contact <TechStat Team Member> at <Email Address> with any additional questions you may have regarding the meeting content and any logistical concerns.

### Investment Notification of TechStat

Send to investment manager as soon as decision to hold a TechStat is made

Dear Investment Manager:

The Agency IRB requests your attendance for a TechStat review of <Investment Name> on <Meeting Date/Time>. The intent of the meeting is to gain a shared understanding of the objectives of the project and understand the risks associated with continued investment.

The IRB requests to be briefed with your best understanding to date on the plan forward for the project with a focus on risk management, and future cost and schedule estimates. Please refer to the attached list of questions for additional inquiries. <Attach Questions List (D), amended to the specific investment’s problem areas>

We request that the project team work with the TechStat team <amend depending upon agency-specific roles and responsibilities> to develop a briefing and corrective action plan on the following topics:

1. Program Overview – to include overall intent/purpose and measurable goals/objectives
2. Summary and status of validated costs, activities/tasks, and milestones
3. Rationale for variance from the original goals/performance measures
   1. Describe any additional scope that may have been added including cost and schedule impact
   2. Describe stakeholder impact to delayed implementation
4. Previous corrective action plans and outcomes and forward thinking plans to prevent subsequent variances
5. Significant risks with mitigation strategies and assignment of risk owners
6. Description of the governance model
7. Relationship of <Investment Name> to dependent investments

By COB <Date>, the CIO requests the following project management artifacts be submitted for review:

* + 1. Project schedule
    2. Risk management plan and risk register
    3. Investment level variance and EVM report
    4. <Insert names of any other documents needed>

By COB <Date>, please send a list of attendees including name and title. Please note that contractors are not permitted in TechStat sessions.

Feel free to contact <TechStat Team Member> at <Email Address> with any additional questions you may have regarding the meeting content and <Support Staff> for any logistical concerns.