On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through GSA Advantage!™, a menu-driven database system. The INTERNET address for GSA Advantage!™ is: http://www.GSAAdvantage.gov.

**Contract Number:** GS-10F-001CA  
**Contract Period:** October 2, 2014 through October 1, 2019  
**Business Size:** Other than small business

**Contract Administration:** Cindy Jecusco  
**Phone:** 203-732-1366  
**Fax:** 203-732-1338  
**Email:** cjecusco@planetree.org
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COMPANY BACKGROUND

Over the past four decades, Planetree, Inc. has partnered with hospitals, continuing care facilities, ambulatory clinics and healthcare organizations across the continuum of care to transform organizational cultures and improve the patient experience. Since its founding by a patient, Angelica Thieriot, as a nonprofit organization in 1978, Planetree has defined what it means for healthcare delivery to be patient-centered, pioneering a structured framework for personalizing, humanizing and demystifying the healthcare experience for patients and their families.

Today, Planetree is an internationally acclaimed innovator in patient-centered care practices, employing full-time professionals from various healthcare-related backgrounds including clinical, educational, research, operational, and administration. Data demonstrates that comprehensive implementation of patient-centric approaches throughout an organization allows for significant increases in patient satisfaction and quality outcomes. Additionally numerous case studies show greater employee engagement, staff retention and recruitment through integrating these principles into organizational mission. Planetree’s President Susan B. Frampton, Ph.D. has led the organization for more than 10 years, and has recently been named co-chair of the National Quality Forum’s National Priorities Partnership, an organization for which she has served as a member since 2009.

Organization’s Size, Experience in the Field, and Resources Available to Perform Services:

Planetree created its patient-centered care model and uses its unique approach in a continually growing membership community of more than 500 acute care hospitals, continuing care communities, ambulatory care centers, community health centers, retail pharmacies and health libraries. Planetree’s industry-recognized methodology has proven adaptable to various healthcare settings—and is scalable from small rural community settings to large integrated systems, such as the Veterans Health Administration. Our project managers and consultants work with organizations to develop an understanding of areas for improvement capitalizing on organizational strengths and unlocking untapped potential to better align patient-centered approaches with management’s overall strategic plan.

Planetree has the ability to provide a range of assessment, education and training sessions, and resources to help an organization achieve its performance goals. These options can all be tailored to fit the needs of the organization and delivered through Planetree’s integrated service solutions including virtual and/or on-site consultation and coaching services. Some of Planetree’s services include:

1. Organizational or Community assessments, including guided discussions with stakeholders, followed by analysis and presentation to senior leaders and boards, along with stakeholder information sessions.
2. Coaching and training for staff tailored to leadership, management, clinical and non-clinical staff, including the development of on-site or online educational courses.
3. Facilitation and decision support services followed by ongoing performance improvement monitoring and measurement.

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DESCRIPTION OF SERVICES

SIN 874-1: Integrated Consulting Services

Planetree shall provide expert consultation, advice, and guidance in support of agencies' mission oriented business functions. This may include studies, analyses and reports documenting any proposed developmental, consultative or implementation efforts. Examples of consultation include but are not limited to: strategic, business and action planning; high performance work; process and productivity improvement; systems alignment; leadership systems; organizational assessments; cycle time; performance measures and indicators; program audits, evaluations, and customized training.

SIN 874-4: Training Services: Instructor Led Training; Web-Based Training and Education Courses, Course Development and Test Administration, Learning Management and Internship

Planetree shall provide off-the-shelf and/or tailored training packages under this SIN to meet specific agency needs related to business services, such as, but not limited to: customer service, team building, process improvement, performance measurement; patient-centered care and patient experience building and program development, performance problem-solving; business process reengineering; quality management; change management; strategic planning; and benchmarking.

LABOR CATEGORIES AND HOURLY RATES

<table>
<thead>
<tr>
<th>Item</th>
<th>SIN</th>
<th>Awarded Labor Category</th>
<th>Min Edu.</th>
<th>Min Exp.</th>
<th>Site</th>
<th>Hourly (including IFF)</th>
<th>Daily (including IFF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>874-1, 874-4RC</td>
<td>Consultant I - Basic Rate</td>
<td>Bachelors</td>
<td>10</td>
<td>Both</td>
<td>$275.82</td>
<td>$2,206.55</td>
</tr>
<tr>
<td>2</td>
<td>874-1, 874-4RC</td>
<td>Consultant II - Basic Rate</td>
<td>Masters</td>
<td>10</td>
<td>Both</td>
<td>$319.27</td>
<td>$2,554.16</td>
</tr>
</tbody>
</table>

TRAINING COURSES AND RATES

<table>
<thead>
<tr>
<th>Item</th>
<th>SIN</th>
<th>Awarded Labor Category/Training Course</th>
<th>Min. Edu.</th>
<th>Min. Exp.</th>
<th>Site</th>
<th>Hourly Rate (including IFF)</th>
<th>Course (including IFF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>874-4, 874-4RC</td>
<td>Designation Prep Course - Basic Rate</td>
<td>N/A</td>
<td>N/A</td>
<td>Web-based</td>
<td>N/A</td>
<td>$311.08 (4 Weeks – 4 Hours Total)</td>
</tr>
<tr>
<td>4</td>
<td>874-4, 874-4RC</td>
<td>Nursing Course - Basic Rate</td>
<td>N/A</td>
<td>N/A</td>
<td>Web-based</td>
<td>N/A</td>
<td>$382.87 (6 Weeks – 6 Hours Total)</td>
</tr>
<tr>
<td>5</td>
<td>874-4, 874-4RC</td>
<td>Patient Centered Performance Improvement Training Course</td>
<td>N/A</td>
<td>N/A</td>
<td>In person</td>
<td>N/A</td>
<td>$604.53 (2.5 days Total)</td>
</tr>
</tbody>
</table>

CUSTOMER INFORMATION

1a. Table of Special Item Numbers with appropriate cross-reference to item descriptions and awarded prices:
<table>
<thead>
<tr>
<th>SIN</th>
<th>SIN DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>874-1, 874-1RC</td>
<td>Integrated Consulting Services</td>
</tr>
<tr>
<td>874-4, 874-4RC</td>
<td>Training Services: Instructor Led Training; Web-Based Training and Education Courses, Course Development and Test Administration, Learning Management and Internship</td>
</tr>
</tbody>
</table>

1b. **Lowest priced model number and lowest unit prices:** Prices shown in the price list are net.

1c. **Labor Category/Training Course Descriptions:**

**Title: Consultant I**

Functional Duties/Responsibilities: Possesses expert knowledge and experience to guide organizations toward a patient-centered culture. Highlights opportunities and exposures of organizations and then partners to address those challenges. Develops services and structures to advance and evolve the support provided to clients.

<table>
<thead>
<tr>
<th>Minimum Education:</th>
<th>Bachelor’s degree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Experience Requirements:</td>
<td>Minimum of 10 years’ work experience in a healthcare-related field</td>
</tr>
<tr>
<td>Required/Supplemental Certifications:</td>
<td>None</td>
</tr>
</tbody>
</table>

**Title: Consultant II**

Functional Duties/Responsibilities: Possesses expert enterprise-wide knowledge and experience to guide organizations toward a patient-centered culture and patient and staff supportive environment. Provides insight and advice concerning strategic direction and applicability of up-to-date, industry standard solutions. Highlights opportunities and generates a needs analysis for each organization and partners to address those challenges. Identifies synergies and facilitates partnering with other entities or affiliate sites for enhanced learning opportunities. Develops services and structures to advance and evolve the support provided to clients.

<table>
<thead>
<tr>
<th>Minimum Education:</th>
<th>Master’s degree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Experience Requirements:</td>
<td>Minimum of 10 years’ work experience in a healthcare-related field</td>
</tr>
<tr>
<td>Required/Supplemental Certifications:</td>
<td>Certification in Quality or Process Improvement Methodologies: PC-PI, ASQ CSSBB or Lean Certification (SME/AME/Shingo Institute/ASQ Partnership)</td>
</tr>
</tbody>
</table>

**Education and Experience Substitutions:**
The above descriptions define the functional responsibilities, education and experience requirements for each labor category. These requirements are a guide to the types of experience and educational background of typical personnel in each labor category.

**Education/Experience Equivalency:**

<table>
<thead>
<tr>
<th>Title</th>
<th>Education</th>
<th>Education/Experience Equivalence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consultant II</td>
<td>Masters + professional education</td>
<td>Bachelors + 12 years relevant experience + professional certification</td>
</tr>
</tbody>
</table>
**Course Title:** Planetree Patient-Centered Designation/Tiered Recognition Prep Course

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Code</th>
<th>Training Services:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>874-4</td>
<td>874-4RC</td>
<td>Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration</td>
<td></td>
</tr>
</tbody>
</table>

Course Description: Taught by Planetree staff who oversee the Patient-Centered Hospital and Resident-Centered Community Designation Program, this four-week course is designed for individuals and organizations planning to apply for Designation or one of the intermediate recognition tiers within the next year. The course will cover the nuts and bolts of applying, including the self-assessment and application process, how to prepare for the site visit and how to access useful resources.

Major Course Objectives:

- Examine the organizational infrastructures that will position your institution well in your pursuit of recognition.
- Identify opportunities for strengthening steering committees, work teams, patient and family advisory councils and more.
- Explore in-depth what it takes for organizations to fulfill the spirit and intent of some of the more challenging criteria.

Assignments between weekly sessions will better familiarize participants with the designation criteria and the documentation requirements so that they are well-prepared to complete their application when the time comes. A virtual chat room monitored by the course instructors will provide participants the opportunity to have their site-specific questions addressed. **Note: participation in this preparatory class is not a requirement for applying for Designation, Bronze or Silver-level recognition.**

Length of Course: The course runs for 4 weeks. All classes are 60-minutes long. All lectures will be recorded and made available within 24 hours to enable those unable to participate in the live class to access the material on their own schedule.

Minimum/maximum number of participants: 4 minimum/no maximum

Quantity Discount: Up to 10 attendees from the same organization can take the course for the price of one

Support Materials (if any): Access to an online course community where all course materials are warehoused

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**Course Title:** Planetree Patient-Centered Virtual Nursing Course- What it takes to deliver patient-centered care at the bedside: A Critical Competency for Nurses Today

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Code</th>
<th>Training Services:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>874-4</td>
<td>874-4RC</td>
<td>Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration</td>
<td></td>
</tr>
</tbody>
</table>

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### Course Description:
This six-week course will engage nurses in learning, discussion, and activities to enhance their understanding of what it means to deliver patient-centered care and why it is important. Developed and taught by nurses with advanced degrees, the course draws on the instructors' first-hand experience implementing the Planetree model at the bedside. The cumulative curriculum dives deeply into the critical role that nurses play in delivering a patient-centered care experience, emphasizing practical strategies for putting patient-centered care into practice in interactions with patients, family members, and fellow members of the care team. The course emphasizes critical thinking, problem solving, reflection, clinical judgment, along with an understanding of patient-centered care. All are critical competencies for nurses today.

### Major Course Objectives:
- Identify the importance of utilizing evidence-based research in healthcare delivery and the evidence for patient-centered care as the preferred delivery method.
- Describes how patient and family involvement in care promotes safety, quality, and cost effectiveness, including decreased hospital acquired conditions (HAC's) and readmission rates.

### Topics to be addressed:
- Implementation of a patient-centered approach to patient engagement that integrates best-practices with evidence-based approaches while ensuring that patients' preferences and priorities are accommodated.
- Strategies to empower patients and families and encourage their participation in healthcare management and decision-making.
- Processes for embedding compassion in care delivery.
- Methods for increasing teamwork in the healthcare setting.
- Tools and techniques of patient-centered quality improvement.
- The impact of the model on quality, safety, patient satisfaction, workplace morale, and other outcomes, including hospital acquired conditions (HAC's) and readmission rates.

### Length of Course:
The course runs for 6 weeks. All classes are 60-minutes long. All lectures will be recorded and made available within 24 hours to enable those unable to participate in the live class to access the material on their own schedule.

### Minimum/Maximum number of participants:
4 minimum/no maximum

### Quantity Discount:
For every 5 people who register (from the same organization), the 6th is free

### Support Materials (if any):
Access to an online course community where all course materials are warehoused.

<table>
<thead>
<tr>
<th><strong>Course Title:</strong></th>
<th><strong>Planetree Regional Patient Centered Performance Improvement Competency Training</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>874-4 874-RC</td>
<td>Training Services: Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration</td>
</tr>
</tbody>
</table>

### Course Description:
This three-day competency training session taught by Certified Lean/Six-Sigma Black Belt, Human Factors, and Quality/Performance Improvement Specialists is the first step in Planetree's intensive training track for Patient Centered Performance Improvement (PC-PI) certification. Completion of this level of PC-PI education specifically develops and expands participants' competencies around their knowledge of various quality management systems (Lean, Six-Sigma, TPS), as well as their underlying constructs and potentials for application. Secondly, candidates learn how to...
apply a Human Factors and Human Performance Technology approach to these quality management tools and how this can augment both work process design and sustainment efforts. Furthermore, candidates learn how to seek out participants from across the organizational continuum and within patient and family stakeholder groups to actively engage in performance improvement initiatives and why this is essential to long term success and viability.

Major Course Objectives:
- Identify key indicators for increasing care systems reliability
- Guide QMS tools learn from Lean and Six Sigma through PC-PI driven continuous diagnostic monitoring approaches.
- Engage patient and family stakeholders in performance improvement
- Increase mechanisms of motivation and awareness for sustaining improvements

Curriculum Highlights:
- PC-PI background and concepts
- Applying the Patient-Centered Quality Filter™
- Lexicon
- Identifying need
- Engaging primary stakeholders

Length of Course: The course runs for 3 days. Day one: 9-4 pm; Day two: 9-4 pm; Day three: 9-1:30 pm

Minimum/maximum number of participants: 12 minimum participants/40 maximum participants

Support Materials (if any): Access to an online course community on MyPlanetree (http://community.planetree.org/home) for posting questions and where course materials can be accessed.

2. Maximum Order: $1,000,000
3. Minimum Order: $100
4. Geographic coverage: The geographic location for all labor categories/training courses is domestic delivery that includes 48 continental states and Washington D.C. only.
5. Point(s) of production: Same as company address.
6. Discount from list prices or statement of net price: Government net prices (discounts already deducted).
7. Quantity Discounts: An additional 1% discount on all single orders exceeding $150,000, an additional 2% discount on all single orders exceeding $300,000 and an additional 3% discount on all single orders exceeding $500,000.
8. Prompt Payment Terms: 1%, 10 days, net 30 days.
10. Foreign Items: None.
11a. Time of Delivery: Specified on the task order.
11b. **Expedited Delivery:** Contact Planetree.

11c. **Overnight and Two-day Delivery:** Not applicable.

11d. **Urgent Requirements:** Contact Planetree for urgent requirements.

12. **F.O.B. Points:** Origin

13a. **Ordering Address:**

Planetree, Inc.
130 Division Street
Derby, CT 06418
Telephone: (203) 732-1365
Facsimile: (203) 732-1338

13b. **Ordering Procedures:** For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs), and a sample BPA can be found at the GSA/FSS Schedule homepage (fss.gsa.gov/schedules).

14. **Payment Address:**

Planetree, Inc.
Attn: Accounts Receivable
130 Division Street
Derby, CT 06418
Telephone: (203) 732-1380
Facsimile: (203) 732-1338

15. **Warranty Provision:** Not applicable.

16. **Export Packing Charges:** Not applicable.

17. **Terms and Conditions of Government purchase card acceptance (for purchases above the micro-purchase threshold):** Contact Planetree.

18. **Terms and Conditions of rental, maintenance, and repair:** Not applicable.

19. **Terms and Conditions of Installation:** Not applicable.

20. **Terms and Conditions of Repair Parts indicating date of parts price lists and any discounts from list prices:** Not applicable.

20a. **Terms and Conditions for any other services:** Not applicable.

21. **List of service and distribution points:** Not applicable.

22. **List of participating dealers:** Not applicable.

23. **Preventive Maintenance:** Not applicable.
24a. Environmental Attributes: Not applicable.

24b. Section 508 Compliance: Not applicable.

25. Data Universal Number System: 073162901

26. Planetree, Inc. is registered in Central Contractor Register (CCR) database.

27. Uncompensated Overtime: Not used


29. Service Contract Act: The Service Contract Act (SCA) is applicable to this contract as it applies to the entire 00 Corp Professional Services Schedule and all services provided. While no specific labor categories have been identified as being subject to SCA due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29 CFR 541.300), this contract still maintains the provisions and protections for SCA eligible labor categories. If and/or when the contractor adds SCA labor categories/employees to the contract through the modification process, the contractor must inform the Contracting Officer and establish a SCA matrix identifying the GSA labor category titles, the occupational code, SCA labor category titles and the applicable wage determination (WD) number. Failure to do so may result in cancellation of the contract.