Performance Work Statement

Information Technology Transformation Detailed Planning

For
Office of the Chief Information Officer
Department of the Interior

1. **PURPOSE**
   The purpose of this requirement is to acquire a highly qualified and proven contractor to develop a detailed plan for Information Technology (IT) Transformation in order to create a modern, consolidated IT Service Delivery organization that will support all Department of the Interior (DOI) bureaus, offices and approximately 80,000 end users.

2. **SCOPE:**
   DOI has established a strategic goal to fundamentally restructure the way that IT services are delivered to internal and external constituents. The vendor shall review the current general IT Transformation Plan and make any further recommendations, and support the Government in the development of a detailed IT Transformation Plan that will achieve this strategic goal by moving DOI to an IT Service Management (ITSM) model for the delivery of IT services. The plan shall reflect a four year implementation period.

   The ITSM approach that is envisioned will be characterized by:

   1. A focus on identifying and serving the customers who are the ultimate consumers of IT services
   2. Driving IT service requirements from customer needs rather than from IT wants or desires
   3. Creating an IT Service Portfolio that describes IT services in terms of their business value to the customer
   4. Using the IT Service Portfolio to provide the high-level organization of an IT Service Catalog into approximately 5-10 Service Areas, for example, “Collaboration Services” or “Geospatial Services”
   5. Decoupling the services defined by the Service Portfolio and Service Catalog from the underlying technology and fulfillment processes used to deliver the service
   6. Development of unit-based pricing models and establishment of enforceable Service Level Agreements (SLAs) for each service
   7. Establishing a process for moving services from initial concept through feasibility analysis, costing, design, implementation and delivery with appropriate decision “gates” that ensure the right IT services are delivered in order to meet customer priorities
8. Utilization of a hybrid delivery model where infrastructure or “utility” services are provided on a consolidated, enterprise-wide basis and mission and program specific applications are provided on a decentralized basis

9. Creation of the following new roles to manage and deliver IT services through the Services Lifecycle:

   a) Relationship Managers to ensure the satisfaction of specific customer segments across the entire range of services to which those customers subscribe
   
   b) Service Managers to ensure that the correct services are offered at the right price and quality levels
   
   c) Delivery Managers to manage and execute technology and fulfillment processes in order to optimize delivery across all supported IT services
   
   d) Quality Assurance to perform measurement and monitoring of process and service outcome to ensure that SLAs are met and to identify opportunities for process improvement.

DOI will be utilizing services provided by the Office of Personnel Management (OPM) to conduct an assessment and analysis of the existing DOI IT workforce. These services will also include development of recommendations for aligning the DOI IT workforce with the ITSM model described above. Therefore, workforce analysis is out of scope for this requirement. However, the contractor will be required to work collaboratively with the workforce analysis service provider to integrate work-force planning recommendations into the detailed project plan.

3. **OBJECTIVE:**

   Figure 1 on the following page shows the high-level roadmap that DOI has developed for the IT Transformation Program.

This roadmap shows the *five major functional components* that are envisioned:

1. **Customer Relationship Management:** establishing the processes for identifying and engaging with customers to identify and prioritize service requirements

2. **Service Portfolio:** definition of the Service Portfolio and the processes required for ongoing management and evolution of the portfolio to meet customer needs

3. **Technology and Fulfillment Processes:** aligning the underlying processes with the various services that they support in order to provide customer satisfaction and to meet established service levels

4. **Budget and Funding:** establishing funding models, chargeback processes and other financial elements that must be addressed in order to successfully operate the ITSM model. These models must define methods to correctly allocate costs associated with underlying processes to multiple service offerings in order to establish unit-based pricing models for each service.
5. **Organizational Change**: leading organizational change regarding workforce alignment and strategic sourcing. As noted above, workforce analysis is out of scope for this requirement but incorporating the results of a separate workforce analysis engagement is in scope for this requirement.
The roadmap also shows the **three major phases** that are envisioned:

- **PHASE 1, LAYING THE GROUNDWORK:**
  This phase will include the completion of the detailed plan as well as:
  
  A. Identification of which services will be provided on a consolidated, enterprise-wide basis and which services will be provided on a decentralized, mission or bureau-specific basis
  
  B. Definition of the IT Service Portfolio and IT Service Catalog
  
  C. Definition of processes for identifying and prioritizing new elements of the IT Service Catalog
  
  D. Refinement of the high level IT Services Lifecycle represented in Figure 2 into a detailed service lifecycle and service governance model
  
  E. Definition of financial modeling templates to support unit-based pricing for services including the allocation of the costs of underlying technology and fulfillment processes to each service supported by those processes
  
  F. Integration of ongoing DOI technology transformation projects into the IT Transformation Plan, including implementation of a single DOI email system, optimization of network architecture, access control, identity management, web hosting services and data center consolidation
  
  G. Planning for the implementation of an Enterprise IT Service Desk
  
  H. Planning for the implementation of Enterprise-wide Asset Management
  
  I. Development of an IT Transformation communications strategy
  
  J. Establishment of Quality Assurance and Performance Management functions
  
  K. Utilizing services provided by OPM to conduct a DOI Workforce Analysis
  
  L. Development of a data center consolidation strategy to allow DOI to address requirements defined by the Federal Data Center Consolidation Initiative (FDCCI)
  
  M. Development of sourcing strategy to include “Cloud First” requirements.
**PHASE 2, ESTABLISHMENT OF IT SERVICE MANAGEMENT:**

In this phase the ITSM model will be established for the initial set of services defined in Phase 1. This phase will also include the implementation of supporting capabilities including:

A. Implementation of Enterprise-wide Asset Management

B. Implementation of Enterprise IT Service Desk

C. Finalization of workforce strategy, in collaboration with services provided by OPM

D. Establishment of the ITSM model for the initial set of IT services

E. Implementation of IT acquisition strategy

F. Realignment of A-130 functions (i.e. Enterprise Architecture, IT Capital Planning, Security, Privacy, etc.) under the DOI CIO.
• PHASE 3, INSTITUTIONALIZE IT SERVICE MANAGEMENT:
This phase will complete the transformation to the ITSM model in each of the five major
functional components described above. This will include the maturation of DOI’s ITSM
model to allow for “steady state” operation as well as:

A. Establishment of the ITSM model for the remainder of the IT Service Portfolio
B. Full implementation of a chargeback model to provide funding for services and
   supporting technology and fulfillment processes
C. Completion of organizational realignment under the DOI CIO
D. Continued consolidation of data centers.

4. EXCLUSION FROM FUTURE COMPETITION:
The contractor with the successful quote for this requirement and any of its employees,
affiliates, and related entities may not propose, bid, subcontract nor consult on the actual
implementation of the recommendations as outlined in this requirement which may result in a
future solicitation(s).

5. CONTRACTOR QUALIFICATIONS

1) The contractor will have an in-depth knowledge, expertise and proven experience in
   assisting large, complex organizations in the adoption and transition to an ITSM model
   for the delivery of IT services.

2) The contractor will have experience in the planning, execution and management of IT
   organizational change initiatives for large Federal government organizations utilizing
   industry best practices for organizational change management.

3) The Project Manager identified by the contractor shall have proven and demonstrated
   experience in managing projects of a similar size, and at a minimum shall be PMP
   certified.

4) The contractor will have demonstrated experience and capabilities in high level report
   writing and oral presentations for executive level management.

5) Vendors’ quote must demonstrate that both the organization and proposed key personnel
   can successfully complete this project on time, within budget and within scope.

6) Vendor MUST indicate the availability of the key personnel who will be assigned to this
   task. Key personnel are all individuals who will be supporting this task in a primary
   capacity, to include full and part-time personnel.

6. BACKGROUND
The U.S. Department of the Interior (DOI) is a large complex organization that protects
America’s natural resources and heritage, honors our cultures and tribal communities, and
supplies the energy to power our future. The U.S. Department of the Interior is a Cabinet-
level agency that manages America’s vast natural and cultural resources. Ken Salazar,
Secretary of the Interior, heads our Department, which employs 70,000 people, including expert scientists and resource-management professionals, in nine technical bureaus under five Assistant Secretaries (Attachment 2 & 3). The various Bureaus and offices each possess their own individual Information Technology personnel and infrastructure resulting in significant duplication of effort, lack of common standards and escalating cost in a severely constrained budget climate.

On December 14, 2010, the Secretary of the Interior issued Secretarial Order (SO) 3309, which calls for the centralization of all IT management and operations functions, including IT infrastructure assets, and all Clinger-Cohen functions (e.g. Records Management, Enterprise Architecture, Capital Planning, Privacy, and Cyber (IT) Security) under the Department Chief Information Officer (CIO). Additionally, within 180 days of the date of the Order, each bureau with more than 5,000 employees who currently has a CIO is required to establish one Senior Executive as an Assistant Director for Information Resources (ADIR) who will oversee the orderly migration of assets under the CIO. The primary objective of the new IT organization will be to implement a dynamic new enterprise business model for delivering scalable IT products and services that are transparent and customer and mission focused. The consolidation of IT management, human resources, and Clinger-Cohen functions within the Office of the Secretary will be addressed in the first phase of the transformation process.

The SO requires that no later than June of 2011, the CIO present a strategic plan to the Secretary that describes how transition of all IT infrastructures to the organization, management, ownership and control of the CIO will be executed. The strategic plan shall describe the new agency-wide 21st Century IT organization, its concept of operations and a schedule for implementation that will not exceed four (4) years from the date of the SO. This strategic plan is not available at this time, however upon finalization and acceptance by the Secretary; the plan will be made available to the vendor after award.

7. **PERFORMANCE REQUIREMENTS:**
The contractor shall be directly responsible for ensuring the accuracy, timeliness and completion of all deliverables under this effort. Specifically, the contractor shall complete the following tasks.
8. **REFERENCE LISTING:**

1. Department of the Interior  
   Secretary Order 3309  
   Date 12/14/2010  
   *Information Technology Management Functions and Establishment of Funding Authorities*  
   [http://elips.doi.gov/app_so/act_getfiles.cfm?order_number=3309](http://elips.doi.gov/app_so/act_getfiles.cfm?order_number=3309)

2. Department of the Interior  
   Date 01/26/2011  
   *Strategic Plan Provides Blueprint for 21st Century Department*  

3. Vivek Kundra, U.S. Chief Information Officer  
   Dated 12/09/2010  
   *25 Point Implementation Plan To Reform Federal Information Technology Management*  

4. Vivek Kundra, U.S. Chief Information Officer  
   Dated 02/08/2011  
   *Federal Cloud Computing Strategy*  

5. *Federal Data Center Consolidation Initiative*  

9. **SPECIFIC TASKS:**
   The contractor shall be directly responsible for ensuring the accuracy, timeliness and completion of all tasks under this effort. Specifically, the contractor shall:

9.1 **TASK 1: DEVELOP DETAILED PROJECT PLAN FOR DOI’S IT TRANSFORMATION PROGRAM**
   In this task, the contractor shall coordinate with DOI’s assigned Contracting Officer’s Representative (COR) to develop the detailed project plans and schedules for implementing the DOI IT Transformation Program. The project plan will expand on the high level IT Transformation Roadmap shown in Figure 1 and provide a significantly more detailed view of the tasks, milestones, predecessors, interdependencies, critical path and resource requirements required to achieve the objectives of the DOI IT Transformation Program.
The detailed project plan will also identify specific deliverables. These deliverables shall be developed and delivered within the period of performance of this requirement (reference Task 2). These deliverables shall include:

1. Recommendations as to what should be included in DOI’s Initial IT Service Portfolio and IT Service Catalog
2. Process and criteria for identifying and prioritizing new elements of the IT Service Catalog
3. Detailed IT Services Lifecycle and Governance Model to include performance management and measurement
4. Recommended management structure including roles and responsibilities required to create a sustainable ITSM model for DOI
5. Financial Modeling templates and chargeback models to support unit-based pricing for services
6. Enterprise Asset Management implementation plan
7. Enterprise Service Desk implementation plan
8. IT Transformation Communications Strategy
9. Organizational Change Strategy for overcoming challenges posed by the prevailing culture at DOI
10. Data center consolidation strategy to allow DOI to address requirements defined by the Federal Data Center Consolidation Initiative (FDCCI)
11. Sourcing and Acquisition Strategy that supports the OMB “Cloud First” directive.

The detailed project plan will integrate tasks and milestones associated with ongoing technology transformation projects and the workforce analysis that will be conducted using services provided by OPM.

The detailed project plan will consist of written narrative that describes the various elements of the plan as well as a detailed Gantt chart that shows the various tasks, milestones, dependencies, etc.

**Task 1 Deliverable:** Detailed IT Transformation Project Plan

**Due Date:** The vendors shall develop a master project schedule which provides the vendors suggested delivery schedule for the deliverable indicated in Task 1. The schedule will include the development of the deliverable; draft and final review and submission dates for the deliverable.
9.2 TASK 2: IT TRANSFORMATION PLAN DELIVERABLES

Under Task 1, the Government identified specific deliverables to be included in the detailed IT Transformation project plan. In this task, Task 2, the deliverables identified in the plan, shall be developed and delivered by the contractor within the period of performance of this requirement. The contractor shall coordinate the development of these deliverables with the COR.

**Task 2 Deliverables:**

1. Recommendations as to what should be included in DOI’s Initial IT Service Portfolio and IT Service Catalog
2. Process and criteria for identifying and prioritizing new elements of the IT Service Catalog
3. Detailed IT Services Lifecycle and Governance Model to include performance management and measurement
4. Recommended management structure including roles and responsibilities required to create a sustainable ITSM model for DOI
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10. Data center consolidation strategy to allow DOI to address requirements defined by the Federal Data Center Consolidation Initiative (FDCCI)
11. Sourcing and Acquisition Strategy that supports the OMB “Cloud First” directive.

**Due Date:** The vendors shall develop a master project schedule which provides the vendors suggested delivery schedule for the deliverables indicated in Task 2. The schedule will include the development of the deliverable; draft and final review and submission dates for each deliverable.

10. PERFORMANCE MEASURES:

The following performance measures have been established to guide the expected level of service for the required support task to be performed under the resulting task orders. The COR will maintain the method of surveillance on a MONTHLY basis and provide a copy to the CONTRACTOR. The COR will inform the contracting officer in writing of control
performance issues. The contracting officer will ensure adequate documentation and corrective action is taken to ensure acceptable performance standards are maintained by the contractor.

<table>
<thead>
<tr>
<th>Task #</th>
<th>Requirement</th>
<th>Performance Standard and Acceptable Quality Level</th>
<th>Method of Surveillance</th>
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<tbody>
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<td>1</td>
<td>Detailed IT Transformation Plan</td>
<td>Draft and Final deliverable are delivered 100% on time</td>
<td>100% Inspection</td>
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</tbody>
</table>
| 2      | 1. Recommendations as to what should be included in DOI’s Initial IT Service Portfolio and IT Service Catalog  
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<td></td>
<td>Bi-Weekly briefings</td>
<td>Delivered within contractual timeframes at least 98% of the time</td>
<td>Customer Feedback</td>
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11. **DEVELOPERABLES:**

11.1 **DEVELOPERABLE INSPECTION , ACCEPTANCE AND QUALITY:**

11.1.1 **DEVELOPERABLE INSPECTION AND ACCEPTANCE CRITERIA**
Final inspection and acceptance of all work performed, reports and other deliverables will be performed at the place of delivery by the COR.

11.1.2 **DEVELOPERABLE GENERAL ACCEPTANCE CRITERIA**
General quality measures, as set forth below, will be applied to each work product received from the contractor under this statement of work.

1. **Accuracy** - Work Products shall be accurate in presentation, technical content, and adherence to accepted elements of style.

2. **Clarity** - Work Products shall be clear and concise. Any/All diagrams shall be easy to understand and be relevant to the supporting narrative.

3. **Consistency to Requirements** - All work products must satisfy the requirements of this statement of work.
4. **File Editing** - All text and diagrammatic files shall be editable by the Government.

5. **Format** - Work Products shall be submitted in hard copy (where applicable) and in media mutually agreed upon prior to submission. Hard copy formats shall follow any specified Directives or Manuals.

6. **Time-lines** - Work Products shall be submitted on or before the due date specified in this statement of work or submitted in accordance with a later scheduled date determined by the Government.

**11.1.3 Deliverable Quality Assurance**

The COR will review, for completeness, preliminary or draft documentation that the Contractor submits, and may return it to the Contractor for correction. Absence of any comments by the COR will not relieve the Contractor of the responsibility for complying with the requirements of this work statement. **Final approval and acceptance of documentation required herein shall be by written approval and acceptance by the COR.** The Contractor shall not construe any letter of acknowledgment of receipt material as a waiver of review, or as an acknowledgment that the material is in conformance with this work statement. Any approval given during preparation of the documentation, or approval for shipment shall not guarantee the final acceptance of the completed documentation.

All deliverables or materials associated therewith (“materials”) prepared by the contractor during the course of this contract are hereby deemed the property of the United States Government, including all intellectual property rights associated with any material. Any restrictive or proprietary language included on any material in any media shall deem the product as undelivered.

**11.1.4 Deliverable Review:**

The **Government** will have a maximum of **five (5) working days** from the day the draft deliverable is received to review the document, provide comments back to the contractor, approve or disapprove the deliverable(s). The **contractor** will also have a maximum of **five (5) working days** from the day comments are received to incorporate all changes and submit the final deliverable to the Government. All days identified below are intended to be workdays unless otherwise specified.

**11.2 Additional Deliverables:**

**11.2.1 Project Management Plan**

The contractor shall prepare a Project Management Plan describing the technical approach, organizational resources and management controls to be employed to meet the cost, performance and schedule requirements for this effort. The Project Management Plan shall detail the products, methods for developing the products, allocation of staff and other resources necessary to produce the products and a revised timeline for producing the products, if necessary. The COR shall receive
the revised Project Management Plan in both hard copy and electronic form. It is assumed the contractor will build the plan in a scheduling application; however the electronic version shall be sent as a pdf file as not all Government employees have access to a scheduling application. Based on the Project Management Plan, the Contracting Officers Representative (COR) will provide approval to move forward on activities planned. The contractor shall request prior approval on all activities not included in the plan or any modifications to the plan after approval has been given. The project management plan is expected to be kept up to date, reflecting current work activities and schedules throughout the life of this requirement. *(Draft due with proposal / final due 5 days after orientation meeting)*

11.2.2 **Orientation Briefing**

Within **five (5) working days** of award of the contract, the contractor shall conduct an orientation briefing for the Government. The Government does not want an elaborate orientation briefing nor does it expect the contractor to expend significant resources in preparation for this briefing. The intent of the briefing is to initiate the communication process between the Government and contractor by introducing key task participants and explaining their roles, reviewing communication ground rules, and assuring a common understanding of subtask requirements and objectives.

The **Orientation Briefing** will be held at the Government's facility (US Department of the Interior – Main Interior Building (MIB) 1849 C street, NW, Washington DC 20240) and the date and time will be mutually agreed upon by both parties, **to be no later than 5 work days after award of contract**.

The completion of this briefing will result in the following:

a) Introduction of both Contractor and Government personnel performing work under this Contract.

b) **Final Project Management Plan** with mutually agreed upon dates to be submitted no later than 5 work days after the orientation meeting.

11.2.3 **Bi-weekly Status Reports & Conference Calls & Briefings:**

The contractor shall document the efforts performed in the completion of each task in a detailed Bi-Weekly Status Report due every two weeks. The status report shall include, at a minimum:

- Program status, to include objectives met, work completed and work outstanding
- Notable achievements
- Issues or obstacles impeding progress and recommended solutions
- Status of deliverables/milestones
- Issues and resolutions
- Resource planning/status
- Topics or issues identified by the government COR
- Description of work completed and plans for next week(s)
- Summarization of the efforts of each primary task in the Government PWS
11.3 DELIVERABLE TABLE: Note: specific delivery dates will be mutually discussed and agreed to during the orientation meeting. Dates assume 4 week month.

<table>
<thead>
<tr>
<th>Item #</th>
<th>Ref</th>
<th>Milestone/Deliverable</th>
<th>Responsibility</th>
<th>Draft (Work Days)</th>
<th>Final (Work Days)</th>
<th>Deliverable Quantity and Distribution</th>
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<tbody>
<tr>
<td>1</td>
<td></td>
<td>Project Management Plan</td>
<td>Contractor</td>
<td>With RFQ</td>
<td>Initial version 5 working days after Orientation Briefing with ongoing updates as required</td>
<td>1 hard copies to the COR 1 electronic copy to the COR 1 electronic copy to the CO</td>
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<td>2</td>
<td></td>
<td>Orientation Briefing</td>
<td>Contractor / Government</td>
<td>N/A</td>
<td>Within 5 Days after award</td>
<td>In person meeting</td>
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<td>3</td>
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<td>Bi-weekly Status Reports &amp; Conference Calls &amp; Briefings:</td>
<td>Contractor</td>
<td>N/A</td>
<td>Bi-Weekly</td>
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<td>4</td>
<td></td>
<td>Non-Disclosure Agreement</td>
<td>Contractor</td>
<td>N/A</td>
<td>2 days after Orientation Briefing</td>
<td>1 electronic copy to the COR 1 electronic copy to the CO</td>
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<td>5</td>
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<td>Conflict of Interest Statement</td>
<td>Contractor</td>
<td>N/A</td>
<td>2 days after Orientation Briefing</td>
<td>1 electronic copy to the COR 1 electronic copy to the CO</td>
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<td>Government Furnished Information</td>
<td>Government</td>
<td>N/A</td>
<td>To be provided at the Orientation Briefing if available</td>
<td>The government will provide limited copies to the contractor at the orientation meeting.</td>
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<td>7</td>
<td></td>
<td>Task 1 Detailed IT Transformation Project Plan</td>
<td>Contractor</td>
<td>As defined in the Vendors’ Detailed IT Transformation Project Plan</td>
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<td>9. Organizational Change Strategy</td>
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<td>for overcoming challenges posed by the prevailing culture at DOI</td>
<td>Contractor</td>
<td>N/A</td>
<td>No later than 5 days after award</td>
<td>COR coordinates the paperwork with the DOI Security Office and other offices to ensure vendor is provided with timely credentials.</td>
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<td><strong>Security</strong></td>
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<td><strong>Personal Identity Verification Forms</strong> – consisting of:</td>
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<td><strong>A.</strong> OPM Standard Form 85 or 85P</td>
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<td><strong>B.</strong> OF 306</td>
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<td><strong>C.</strong> Fingerprint card (local procedures may require that the fingerprinting be done at a police station; in this case, any charges are to be borne by the CONTRACTOR.)</td>
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<td><strong>D.</strong> Release to Obtain Credit Information</td>
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<td><strong>E.</strong> PIV card application (web-based)</td>
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12 GOVERNMENT FURNISHED INFORMATION & EQUIPMENT

12.1 GOVERNMENT FURNISHED INFORMATION:
The government will supply the following information in support of this requirement.
(1) DOI IT Transformation Strategic Plan (Reference SO 3309) – not available until after June 2011

All materials provided by the Government during the course of this contract shall remain the property of the Government and shall be returned immediately upon completion of the contract or as otherwise requested by the COR or Contracting Officer.

12.2 GOVERNMENT FURNISHED EQUIPMENT: None.
When at DOI facilities, the contractor shall be provided with phone, copier and fax service only, computer access and connectivity will not be provided. The contractor is responsible for providing its staff with their own equipment, (i.e., laptops, cell phone, blackberry, air card, etc) in support of this requirement.

13.0 DOI IT System Access: Yes

14.0 ACCESS TO GOVERNMENT PROPERTY OR FACILITIES
The Contractor will be allowed limited access to the Government's facilities. The COR or other Government official as identified by the COR will coordinate and ensure access to the government facilities is provided. The Contractor will be required to check-in at the facility in accordance with the facility procedures and receive a temporary visitor’s pass. The Contractor will display this badge at all times while on government premises. The Contractor will comply with all rules and regulations specific to the government facility.

15.0 OTHER DIRECT COST - Other Direct Costs (ODCs): ODC’s are NOT authorized on this order.