Attachment 1

Blanket Purchase Agreement Statement of Objectives

For

Review of Service First

At the Department of the Interior, Office of the Secretary

1. **PURPOSE:**

   The Department of the Interior (Interior) requires strategy and project management services to assist the Department in achieving its strategic and priority goals in support of a Service First Initiative. Therefore, it is the intent of Interior to issue a multiple award Blanket Purchase Agreement(s) (BPA) to secure the services of one or more strategic partners who will assist Interior in identifying and analyzing possible consolidation efforts, assessing consolidation options available to Interior (e.g., consolidate within Interior, restructure, or outsource), making recommendations, implementation planning and execution activities that maximize the efficiency and effectiveness of the functions considered for consolidation to create a 21\textsuperscript{st} Century Interior in a collaborative environment.

2. **OBJECTIVE:**

   The Department seeks improvements in Interior-wide program delivery, business processes, support services, and facilities management. To that end, the Department seeks a strategic partner(s) to assist with the following activities in support of its Service First Initiative:

   1) Improve the effective utilization of resources – funding, staffing, infrastructure – and other resources in the delivery of Interior programs
   2) Improve the functionality of systems and processes to improve value capture and optimize use;
   3) Encourage collaboration, improved customer service, and implement innovative, cost-effective approaches;
   4) Find and achieve efficiencies and administrative savings within the Department;
   5) Maximize existing Department co-location and consolidation efforts to achieve more effective and cost efficient operations;
   6) Improve transparency and accountability;
   7) Improve the availability and utilization of program performance, cost and other information to support decision making;
   8) Formulate options for reorganization, process simplification, and other means to consider in a constrained budgetary environment;
9) Leverage information technology to improve and optimize program delivery; and
10) Develop and advance collaborative strategies for Interior Bureaus and Offices to achieve mission and programmatic goals, such as the Service First initiative.

3. **SCOPE:**

The scope of this multiple award BPA encompasses requirements to provide Interior and its bureaus and offices with expert strategy, program management, and implementation support services in support of its’ Service First Transformation Initiative.

4. **BACKGROUND – INTERIOR & SERVICE FIRST:**

**INTERIOR BACKGROUND:**

Interior’s mission is to protect and manage the Nation’s natural resources and cultural heritage; provide scientific and other information about those resources; and honor trust responsibilities or special commitments to American Indians, Alaska Natives, and affiliated island communities. The Department does this with high standards of ethical conduct, management, accountability, transparency, and through partnerships that leverage resources and skills and improve Interior’s ability to be effective at the local and regional levels.

A breadth of programs operate in over 2,400 locations across the Country with concentrations of programs, resources, and staff in cities including Anchorage, Alaska; Portland, Oregon; Albuquerque, New Mexico; Denver, Colorado; Atlanta, Georgia; and others. The overlap of programs, comparable services, relationships and interaction create an opportunity for leveraging, shared services, cross-servicing, and best practices.

The services requested are in support of compliance with numerous legislative mandates and other directives that promote programmatic and financial accountability and transparent, efficient, and effective program delivery. The Department’s 2012 budget incorporates government-wide initiatives for administrative cost reductions. The Accountable Government Initiative and a new Executive Order “Delivering an Efficient, Effective, and Accountable Government” mandate a more cost effective and accountable government.

The Department’s 2012 budget includes funding reductions in support of the Accountable Government Initiative. These augment 2011 budgeted reductions in spending for information technology, strategic sourcing, and travel and various efficiencies identified by bureaus and offices. The Department is currently in the process of implementing an information technology transformation initiative that will complement the efforts described in this requirement. Numerous bureaus and offices also have efforts underway to achieve efficiencies and cost savings, some of which overlap. Improved integration of these efforts could result in added benefits.
The Department’s 2011-2016 Strategic Plan sets out the Department’s high priority goals. One of the five strategic goals is Building a 21st Century Department. This goal and its attendant strategies set a direction for the Department to effectively deliver core mission programs through improvements in workforce management, youth stewardship and engagement, sustainable operations, efficient information technology, and effective acquisition and asset and facilities management. These are challenging goals in an environment with increasing demands for performance, accountability, and transparency; technology and workforce challenges; and constrained funding and staffing. The development of a set of opportunities and plans for transformation will assist the Department to achieve its strategic goals and bring about changes in the way business is conducted, and achieve efficiencies.

The Department’s Service First transformation Initiative will assist the Department in achieving the following:

1. A highly motivated and results-oriented, collaborative, skilled and sustainable workforce.
2. An organization that is accountable for its performance and customer satisfaction and responsive to employee feedback.
3. An organization with flexible, modern rules and systems that empower employees to produce results with accountability and transparency.
4. An organization that is collaborative with stakeholders.
5. An organization that is effective and efficient.
6. A mission-driven culture that cultivates innovation, teamwork, a customer focus, teamwork, risk-taking, transparency and proactive behavior, within a healthy, open environment.
7. An organization that optimizes resource utilization through flexible operating strategies within bureaus and across the Department with the goal of maximizing support for mission-driven objectives.
8. An organization that has access to modern tools and systems that support effective and efficient processes.

5. SERVICE FIRST:

Service First is a partnership authority among four agencies: The Bureau of Land Management, the Forest Service, the National Park Service and the Fish and Wildlife Service and provides an excellent foundation on which to expand efforts to realize additional benefits. Service First authority allows these agencies to conduct projects, planning, permitting, leasing, contracting and other activities, either jointly or on behalf of one another; co-locate in Federal offices and facilities leased by an agency of either Department; and promulgate special rules as needed to test the feasibility of issuing unified permits, applications and leases. The Secretaries of Interior and Agriculture may make reciprocal delegations of their respective authorities, duties and responsibilities to promote customer service and efficiency.
The benefits of Service First include:

1) Leverages employee skills and expertise across the land management agencies
2) Enables development of shared approaches to mission goals that can optimize strategies for resource management including for example watershed and landscape restoration
3) Reduces agency costs by allowing shared use of resources and duplicative functions
4) Eliminates redundant efforts
5) Provides one stop shopping to the public by reducing points of contacts and improved delivery of programs
6) Enhances communication between agencies and the public
7) More information to include locations, maps, and service authority may be found at http://www.fs.fed.us/servicefirst/.

6. CONTRACTOR QUALIFICATIONS

The contractor(s) selected to perform the activities described in this statement of objective (SOO) for the resulting multiple award BPA(s) should have the following qualifications.

1. The contractor will have in-depth knowledge, expertise and proven experience in assisting large, complex organizations in becoming more effective, efficient, and high performing.
2. The contractor will have successfully supported and delivered a variety of strategic assessment, program management, planning implementation, and execution support for Federal organizations.
3. Staff with in-depth knowledge and proven experience in the development of performance measurement programs, metrics and the implementation and management of these metrics in a large Federal environment with diverse entities.
4. Demonstrated capabilities and experience in risk assessment, gap analysis, and the implementation and management of change.
5. Proven and demonstrated expertise and experience in assisting large Federal organization in the identification of strategic opportunities, benchmarking, and the successful implementation of these changes.
6. Demonstrated and proven experience in stakeholder outreach and communication plan development, training material development and training to successfully manage transformation change.
7. The contractor will have demonstrated expertise in the planning, execution and management of a large, complex organizational change initiative for a large Federal government organization utilizing industry best practices for organizational change management.
8. The contractor will have demonstrated and proven experience in supporting workforce planning initiatives in a Federal environment.
9. 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. The Government will accept comparable training and years of experience.
10. The contractor will have demonstrated experience and capabilities in high level report writing and oral presentations for executive level management.

7. **DETAILED DESCRIPTION OF TASKS TO BE PERFORMED UNDER THIS BPA:**

**TRANSFORMATION GOALS AND STRATEGY PROGRAM SUPPORT SERVICES:**

The vendor will assist the Department in the identification of opportunities, development of plans, and implementation and management and execution activities of the Department’s Service First transformation goals. The contractor will perform services to improve the ability of bureaus and offices to evaluate services, facilities, programs, and resources; to identify priorities and sequence efforts; and to develop implementation plans, performance, and metrics; and assist in implementation including communications.

The vendor will make available a catalog of services to support Department and bureau and office transformation efforts. The contractor will assist in the prioritization of efforts to attain strategic goals and meet legislative, administrative and programmatic mandates.

The contractor will perform services to improve the ability of the Department and bureaus and offices to implement Service First; to share services, facilities, programs, and resources; and to reach agreed upon levels of services and service agreements. The activities will assist the Department to implement Department-wide goals, legal and regulatory requirements, and Administration and Departmental management goals. The contractor will support decision making by facilitating meaningful engagement with appropriate stakeholders from the Department, bureaus and offices in order to develop options that incorporate consensus views and stakeholder input.

**ANTICIPATED ACTIVITIES TO BE PERFORMED UNDER THIS BPA:**

Suggested activities that fall within the scope of this BPA include the following; however additional services not described may be requested that are within scope of the Service First Initiative as described under the purpose, objective, scope and transformation goals and strategy program support services sections of this document.

1) Establishment and operation of program management governance structure(s) to manage transformation initiatives. Included within this is the establishment of decision criteria and framework, processes, tools and reports for prioritizing and selecting transformation projects; establishment of the structure for assigning staff and financial resources, establishment of schedules and tracking major milestones; managing and resolving major issues and risks; and monitoring performance against desired outcomes.

2) Establishment and Operation of a Performance Measurement Framework. Included within this is the identification, implementation and monitoring of key performance indicators; improved linkage of resource allocation decisions to performance, and support for
implementation of the Government Performance and Results Act (GPRA) Modernization Act requirements.

3) Business Process Reengineering and Transformation Support. Included within this is the identification of transformation opportunities, benchmarking, development of alternatives, development and analysis of business cases (to include return on investment) for transformation, identification of the most viable initiatives, and development of the implementation plan for selected initiatives. This also includes value capture and improved functional utilization of information technology systems and solutions.

4) Implementation Planning. Included within this is the development of implementation plans based upon best practices, optimization of customer services and support, and realization of DOI missions and goals.

5) Communications Planning and Delivery. Included within this is the development and execution of segmented organization, employee and stakeholder communication strategies using a variety of mediums.

6) Organizational Change Management Support. Included within this is the development of strategies and approaches to assist Interior in managing change to include facilitated sessions, and customized training.

7) Workforce Planning. Included within this is the analysis of workforce levels and skills, identification of gaps, and development of plans to resolve gaps.

8) Project Management and Quality management services that ensure effective project management, quality control, quality assurance and quality improvement across the transformation projects.

9) Implementation Assistance. Included within this is support for organizational and employee orientation, communications with employees/stakeholders/OMB/Congress, organizational change and process modification, value capture realization, customized training, and monitoring and feedback of results.

PLANS THAT MAY BE DEVELOPED AND PROVIDED UNDER THIS BPA:

The following is a listing of anticipated plans to be developed under this BPA, however additional plans not described may be requested that are within scope as it relates to the Service First Transformation Initiative. The contractor will work with Interior to implement these and other plans. The activities would include a range of services needed to ensure successful realization of plans and post-implementation reviews to evaluate customer satisfaction, including communications.

Implementation plans shall address all phases and aspects of implementation to include:

1) Provide Project management support, monitoring implementation plan progression, supporting risk management activities, and identifying and monitoring critical success factors.

2) Support the implementation of business functions and processes by assisting in the documentation of roles and responsibilities.
3) Support the implementation of performance metrics and process improvement efforts.
4) Support organizational training by supporting the development of training materials and supporting the execution of training sessions.
5) Support change management including implementation of the change management plan.
6) Support the workforce transition plan by assisting in documenting workforce position descriptions and supporting training efforts.
7) Support stakeholder outreach efforts through the development of presentations, briefings, white papers.
8) Support the development and implementation of internal and external communication strategies by development of various communication materials geared towards internal constituents and stakeholders.
9) Support the transition of the organizational governance, facilities and infrastructure changes, and business support mechanisms.

Additionally, the contractor(s) will assist in the development of new plans and will provide services to facilitate the attainment of the goals defined in the following Department plans:

1) The Department’s Real Property Management and Innovation Plan, which identifies 2010-2016 goals for asset disposition;
2) The Department data center consolidation plan, which identifies the Department’s five year plan for data center consolidation;
3) The Department’s Sustainable Building Implementation Plan, which identifies steps to meet goals for sustainable building design and management; and
4) The Department’s Strategic Sustainability Performance Plan, which identifies the Department’s approach for sustainable management.

**ADMINISTRATIVE MATTERS (BPA AND FLOWS DOWN TO BPA CALLS)**

**DELIVERABLE 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.

**DELIVERABLE 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 objectives.

- **Accuracy** - Work Products shall be accurate in presentation, technical content, and adherence to accepted elements of style.
- **Clarity** - Work Products shall be clear and concise. Any/All diagrams shall be easy to understand and be relevant to the supporting narrative.
- **Consistency to Requirements** - All work products must satisfy the requirements of this statement of objectives.
- **File Editing** - All text and diagrammatic files shall be editable by the Government.
• **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.

• **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.

**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 objectives statement. Final approval and acceptance of documentation required herein shall be by letter of 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 objective 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 prepared by the contractor during the course of this contract are the property of the Government.

**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.

**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 BPA(s).*
The completion of this briefing will result in the following:

a) Introduction of both Contractor and Government personnel performing work under this BPA(s).

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

**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:

**Bi-weekly Status Report:**
Reporting requirements for the bi-weekly status reports will be outlined at the initial orientation meeting. This status report will be in a concise written form and will be supplemented by face-to-face meetings or conference calls as appropriate. It is expected that these will include, but not be limited to:

- *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)
- Summarize the efforts of each primary task in the Government SOW

**REFERENCES:**

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