Contract Number *(VA-210625-CAI)*

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| **STATEMENT OF REQUIREMENTS (SOR)** **SOR # VITA-220926-01-CAI**  ***VITA Multi-Sourcing Service Integrator Advisory and Support Services*** |

1. **Date:** September 26, 2022
2. **Authorized User**: Virginia Information Technology Agency
3. **Authorized User Contact Information:**

*Naveen Abraham*

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Richmond,  VA  23225

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1. **Solicitation Schedule:**

|  |  |
| --- | --- |
| **Event** | **Date** |
| Release SOR | (10-3-2022) |
| Supplier Response Due | (10-10-2022) |
| Award Decision | (10-14-2022) |
| Estimated Project Start Date | (10-31-2022) |

1. **Evaluation and Scoring**

Supplier’s Response must be submitted in the specified Statement of Work (SOW) format and will be evaluated for format compliance.

Supplier’s Response will be evaluated for technical merit based on its appropriateness to the performance of Authorized User’s requirements, its applicability to the environment, and its effective utilization of Supplier and Authorized User’s resources.

1. **Project/Service:**

Multi-Sourcing Service Integrator Advisory and Support

1. **Specialty Area** (Check one)**:**

|  |  |
| --- | --- |
| Application Development | Information Security |
| Business Continuity Planning | IT Infrastructure |
| Business Intelligence | IT Strategic Planning |
| Business Process Reengineering | Project Management |
| Enterprise Architecture | Public Safety Communications |
| Enterprise Content Management | Radio Engineering Services |
| Back Office Solutions | IV&V Services |
| Geographical Information Systems |  |

1. **Contract Type : Fixed Price, Deliverable-based**
2. **Introduction:**

Project History

The Virginia Information Technologies Agency (VITA) provides centrally managed shared services for statewide IT infrastructures. VITA provisions services and solutions to executive branch agencies, leveraging a Multi-sourcing Service Integrator (MSI) to organize and coordinate multiple offerings, platforms, suppliers, and the VITA organization. The services include Server/Storage, Cloud, Mainframe, Messaging, Network, Security, End User Services, and Managed Print. VITA is preparing for a rebid of its MSI contract and seeks a Supplier to provide sourcing advisory services to support the planning and solicitation development process for this upcoming MSI Request for Proposal (RFP).

Business Need

The Supplier will provide services to assist VITA with assessment, research, and recommendations related to options for the future provision of MSI services currently under contract with SAIC. The Supplier will provide specialized consulting and sourcing advisory services from industry experts with specific experience and knowledge of current best practices in sourcing MSI services in the state government marketplace. The Supplier will assist in the development of an MSI sourcing strategy and associated recommendations, including:

* Assessment of the Commonwealth’s current and future needs
* Evaluation of service options and models for managing and delivering those services
* Development of a financial base case
* Readiness assessment of the VITA governance model

1. **Scope of Work:**

This SOR addresses strategy and planning *ONLY*. Based on the outputs of the strategy and planning phase, VITA may issue a subsequent SOR for the Supplier to assist with developing an MSI Request for Proposal (RFP), the RFP documents for the various service tower suppliers in the future MSI environment, the sourcing transaction (e.g., evaluations, clarifications, negotiations), or transition and implementation phases.

**Strategy and Planning**

The Supplier will develop the core planning materials for the MSI sourcing program, define the current state baseline, and establish the strategic objectives of the program.

Key advisory support during includes:

1. Project Kickoff – Identify core team and executive steering committee, roles and responsibilities, meeting cadence, and reporting structure, and key milestones and dates.
2. Current State Baseline – The Supplier will leverage existing artifacts, conduct interviews, evaluate current services, and perform market research to inform service requirements for the MSI Request for Proposal (RFP). The following stakeholders will be interviewed: Executive Leadership, Shared Services Program Management, Shared Services Customers, and Service Providers.
3. Strategy Workshop – Facilitate a workshop to solicit inputs from VITA leadership and sourcing management to capture customer needs, service challenges, and future state desired outcomes.
4. Analysis and Recommendations – Prepare a gap analysis of the current state and desired future state and explore how the business requirements can be met in a more efficient and effective service delivery model, including the disposition of the current MSI scope.
5. Risk Register – Identify, document, and categorize risks and develop mitigation strategies. The risk register is intended to be maintained and updated throughout the sourcing program.
6. Governance Readiness – Assess the current state of the VITA program governance model as it applies to the future state environment, including information gathering from VITA leadership, Service Providers, and customers. Analyze the organizational impact of the evolving MSI model on the VITA retained organization. Identify recommendations for adjusting governance and VITA roles and responsibilities to ensure contractual obligations and organizational interactions evolve to meet the desired outcomes of the future state environment.
7. **Period of Performance:**

Delivery of all products and services defined in the Statement of Work will occur within two *(2)* months of project execution date.

1. **Place of Performance** (Check one)**:**

Authorized User’s Location

Supplier’s Location

Authorized User’s and/or

Supplier’s Location

VITA and Supplier will mutually agree to any onsite requirements

1. **Project Staffing**
2. **Supplier Personnel**

The Supplier should propose the personnel required to perform the services.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Key Personnel (Y/N)** | **Years of Experience** | **Certifications** | **References Required (Y/N)** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

1. **Authorized User Staff**

The roles listed in the table below represent Authorized User’s staff and the estimated time each will be available to work on the project.

|  |  |  |
| --- | --- | --- |
| **Role** | **Description** | **% Project Availability** |
| Cynthia Cordova-Edwards | Chief Financial Officer | 10% |
| Naveen Abraham | Chief of Infrastructure Services | 10% |
| Shabeen Vijayan | Platform Sourcing Manager | 20% |
| Chad Wirz | Director, Service Solution, Transition and Problem Management | 20% |
| Mike Shaffer | Technical Services Delivery Manager | 20% |
| Scott Jaeger | IT Service Management Manager | 50% |
| Matt Gill | Service Owner, End User Services | 50% |

1. **Milestones and Deliverables:**

The minimum required milestones and deliverables, and the estimated completion date for each deliverable, are listed in the following table.

| **#** | **Milestone**  **Event(s)** | **Deliverable(s)** | **Estimated Completion Date** |
| --- | --- | --- | --- |
| 1 | **Strategy and Planning** | * + - **MSI Sourcing Charter:** A document that identifies the core team, executive steering committee, vision, and objectives of the MSI program, and key milestones and dates.     - **Baseline Assessment:** A report and an executive presentation for VITA’s leadership that provides an evaluation of the current services, a gap analysis to the desired state, a financial benchmark to other state MSI services, and recommendations for consideration in an RFP.     - **Acquisition Plan:** A report that contains a set of recommendations addressing the operating model, performance model, and business model, including a revised financial base case reflecting the proposed MSI scope. The plan includes an implementation roadmap of key events sequenced on a timeline.     - **Risk Management Presentation:** A report supported by a registry of risks documenting: risk event, potential outcome, risk period, impact, probability, matrix score, risk response, mitigation strategy, owner, status, etc. | Supplier to Propose |
| 2 | **Governance Readiness – Current State Assessment** | * + - A report and presentation highlighting the data collection and analysis of the state of the current governance model, VITA responsibilities, and Service Provider interactions in meeting contractual obligations and achieving desired outcomes. | Supplier to Propose |
| 3 | **Governance Readiness – Recommendations and Roadmap** | * + - **MSI Change Impact Assessment:** A report and presentation highlighting the organizational impact of the evolving MSI scope and overall alignment of the roles and responsibilities between the parties (the MSI and the VITA retained organization).     - **Governance Recommendations and Roadmap:** A report containing a set of recommendations regarding the continual improvement of VITA’s governance model and actions and steps to increase VITA’s capabilities to manage the overall program, reflecting the changes to the MSI scope | Supplier to Propose |

The Supplier should provide all deliverables in electronic form, using the following software standards (or lower convertible versions):

|  |  |
| --- | --- |
| **Deliverable Type** | **Format** |
| Assessment and Recommendation Deliverables | Microsoft Word, Excel, PowerPoint |

1. **Travel Expenses** (Check one)**:**

No travel will be required for this engagement

Travel must be included in the total fixed price of the solution

1. **Payment** (Check all that apply)**:**

Payment made based on successful completion and acceptance of deliverables

All payments, except final payment, are subject to a *(XX)*% holdback

1. **Acceptance Criteria:**

The Project Manager will have ten (10) business days from receipt of the deliverable to provide Supplier with the signed acceptance receipt.

Final acceptance of services provided under the SOW will be based upon (Check one):

User Acceptance Test

Acceptance Criteria for this solution will be based on a User Acceptance Test (UAT) designed by Supplier and accepted by Authorized User. The UAT will ensure that all the functionality required for the solution has been delivered. The Supplier will provide the Authorized User with a detailed test plan and acceptance checklist based on the mutually agreed upon UAT plan. This UAT plan checklist will be incorporated into the SOW.

Final Report

Acceptance criteria for this solution will be based on a final report. In the SOW, Supplier and Authorized User will agree on the format and content of the report to be provided to Authorized User for final acceptance.

Other (specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Project Roles and Responsibilities:**

| **Responsibility Matrix** | **Supplier** | **Authorized User** |
| --- | --- | --- |
| *Develop Project Plan* |  |  |
| *Conduct Stakeholder Interviews* |  |  |
| *Prepare All Deliverables* |  |  |
| *Facilitate Stakeholder Meetings* |  |  |
| *Provide Documentation or other Data MSI* |  |  |
| *Approve Deliverables* |  |  |

1. **Criminal Background Checks and Other Security Requirements (**Check all that are required):

Standard CAI Required Background Check

Agency Specific Background Check – VITA fingerprinting

1. **Performance Bond** (Check one)**:**

Required for *(XXX)*% of the SOW value

Not Required

1. **Reporting** (Check all that are required):

**Weekly Status Update**

The weekly status report, to be submitted by Supplier to Authorized User, should include: accomplishments to date as compared to the project plan; any changes in tasks, resources or schedule with new target dates, if necessary; all open issues or questions regarding the project; action plan for addressing open issues or questions and potential impacts on the project; risk management reporting.

**Other(s)** (Specify)

1. **Federal Funds** (Check one):

Project will be funded with federal grant money

No federal funds will be used for this project

1. **Training and Documentation:**
2. **Training is:**

Required as specified below

Not Required

Training Requirements:

1. **Documentation is:**

Required as specified below

Not Required

Documentation Requirements:

*As detailed in Section 14*

1. **Additional Terms and Conditions:**

The services to be provided are subject to the following additional provisions:

1. Effective July 1, 2020, the Code of Virginia requires contractors with the Commonwealth who spend significant time working with or in close proximity to state employees to complete sexual harassment training.  As a result of the new code, VITA and the Department of Human Resource Management (DHRM) are requiring that all contractors working through the CAI contract complete DHRM's "Preventing Sexual Harassment" training.  This training is available as either a short video or a written transcript on the DHRM website: <https://www.dhrm.virginia.gov/public-interest/contractor-sexual-harassment-training>. The selected Supplier must agree that any assigned resource will complete the training.
2. The selected Supplier must agree that any assigned resource will review and conform to the IT Contingent Labor Program (ITCL) Contractor Code of Conduct. The Code of Conduct can be reviewed on VITA’s website at the following link:

<https://www.vita.virginia.gov/media/vitavirginiagov/supply-chain/pdf/Contingent-Worker-Code-of-Conduct.pdf>

1. **Scheduled Work Hours:**

Work to be performed during standard work hours.

1. **Facility and equipment to be provided by Authorized User:**

Supplier will provide their own laptops and other office equipment. VITA will provide meeting space for any onsite meetings required.