Contract Number *(VA-210625-CAI)*

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| **STATEMENT OF REQUIREMENTS (SOR)** **SOR # VDSS-230227-01-CAI**  **VDSS Enterprise Transformation & Portfolio Management** |

1. **Date:** February 27, 2023
2. **Authorized User**: Virginia Department of Social Services
3. **Authorized User Contact Information:**

Danny Avula

Virginia Department of Social Services  
801 East Main Street, Richmond, VA 23219  
[danny.avula@dss.virginia.gov](mailto:danny.avula@dss.virginia.gov)

1. **Solicitation Schedule:**

|  |  |
| --- | --- |
| **Event** | **Date** |
| Release SOR | 02/27/2023 |
| Supplier Response Due | 03/06/2023 |
| Award Decision | 03/07/2023 |
| Estimated Project Start Date | 03/27/2023 |

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 resources.

1. **Project/Service:** VDSS Enterprise Readiness Assessment
2. **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** (Check)**:**

Fixed Price, Deliverable-based

1. **Introduction:**

The Virginia Department of Social Services (VDSS) is an agency that reports to the Virginia Secretary of Health and Human Resources. VDSS achieves its mission— To design and deliver high-quality human services that help Virginians achieve safety, independence and overall well- being —by partnering with multiple internal and external organizations and stakeholders to provide vital services to Virginia’s citizens.

VDSS is undergoing an enterprise transformation journey to improve the citizen experience, optimize the VDSS professional experience, maximize efficiencies for the workforce, and reduce the cost to serve the constituent population. This calls for managing business transformation at scale, establishing an enterprise platform with integrated data and services, and designing a comprehensive and intuitive customer journey for state workers, local workers, and public constituents. Desired outcomes include moving from lengthy, waterfall, and expensive deployments to a rapid, agile, and predictable enterprise approach using an intentional platform architecture and predictable costs to deliver “quick wins”, mature enterprise capabilities, and iteratively realize business value.

VDSS has secured funding for several large initiatives, and is in the process of planning, execution, and production support for the following large system implementation initiatives:

* Virginia Enterprise Licensing Application (VELA)
* SNAP Knowledge Base
* CommonHelp
* Child Support System Modernization (CSSM)
* Comprehensive Child Welfare Information System (CCWIS)

For each of the new enterprise systems, the agency’s goal is to develop the internal capabilities to perform application operations and maintenance services and implement system enhancements without dependence on a third-party integrator. The VDSS lines of business, in coordination with IT Services, will drive the requirements, identify the needed changes & enhancements, and assess the risks/dependencies for all enterprise projects. Each enterprise project will be implemented using an enterprise delivery methodology that will require the management of concurrent sprints, portfolio-level risks and dependencies, and coordinated support from VDSS stakeholders across all divisions. Each project will also require major procurement efforts to select system integrators that will assist in deploying functional capability in an accelerated manner. Once the systems are in production, internal VDSS staff will be required to operate and maintain the systems. Therefore, the project teams will require multiple technical team members to work closely with the contracted system integrators during the implementation projects to ensure there is an effective transition to the internal staff at the completion of each project. The VDSS lines of business will drive the enhancements and other changes after a system is in production.

From an enterprise transformation perspective, VDSS has successfully established an IT investment council and has deployed initial LCAP applications to their production environment. To help drive progress and provide services to support continued project delivery and transformation, VDSS seeks to partner with a supplier that brings implementation experience to establish a transformation team that is focused on enterprise alignment and change management. Establishing portfolio-level processes and frameworks is a key first step for establishing an agency Transformation Office that will be run by agency staff in the future. The use of an enterprise approach, applied at the Portfolio level, will provide for greater functional and data integration across all VDSS lines of business and will move the agency closer to the goal of creating an integrated social services ecosystem.

**10. Scope of Work:**

This Statement of Requirements (SOR) defines the Enterprise Transformation & Portfolio Management activities required by the Authorized User in support of Virginia Department of Social Services Enterprise Initiatives.

Following the enterprise readiness assessment that was conducted in 2022 to evaluate the organization’s capability to undertake four separate, concurrent major initiatives using the existing internal resources, coupled with external contracted system integrators, VDSS recognizes the need to create an enterprise transformation office to accelerate change and transformation to execute upcoming initiatives.

VDSS seeks a Supplier to stand up the transformation team and execute the recommended foundational and tactical activities to close gaps, identify and recommend software tools (e.g. Microsoft Project, Atlassian Jira, Azure DevOps, Copado GitHub, etc), to support the software delivery process, and improve the likelihood of successful project outcomes. The Supplier will also provide recommendations on the implementation of cross-functional product teams consisting of a line of business, IT Services, Information Security, and contracted system integrators to facilitate the delivery of systems, and provide ongoing product support after a project is complete. The Supplier will review the current Change Advisory Board (CAB) and make recommendations for the transition of the CAB to support more Agile deliveries. A goal of this SOR is to also identify a transition plan and path to transition all of the functions of the Digital Transformation Office to VDSS staff after a period of 6 months. This requires the Supplier to develop and deliver training, standard operating procedures, templates, and documented policies that can be used by VDSS staff to sustain and operate the Digital Transformation Office once the transition is complete. As part of this transition effort, the Supplier will also provide recommendations on specific staffing and skills needed to sustain the Digital Transformation Office after transition to VDSS.

The Supplier will provide a transformation team that consists of a Portfolio Manager, Organizational Change Management (OCM) Lead, Agile Transformation Delivery subject matter experts and analysts, and a User Experience Director. Additionally, the Digital Transformation Office will incorporate and provide oversight for the functions of the Salesforce Technical Program and the Testing Program. Staff and support for these two functions will be provided by VDSS thru FTEs or separate consultants.

Graphical user interface, text, application

Description automatically generated

Portfolio Management: The Supplier will provide support to review current practices and facilitate project portfolio management best practices. This includes recommendations on software tools to capture and manage the portfolio of agency projects and all associated agency resources (staff and budget). The Supplier will also coordinate across all business areas to rebaseline current enterprise initiatives and timelines.

Organizational Change Management: The Organizational Change Management Lead will play a key role in ensuring business transformation program objectives are realized on time and on budget by increasing employee adoption and usage. This person will focus on the people side of change, including changes to business processes, systems and technology, job roles and organization structures. The primary responsibility will be creating and implementing change management strategies and plans that maximize employee adoption and usage and minimize resistance. The change manager will work to drive faster adoption, higher ultimate utilization of and proficiency with the changes that impact all employees.

Agile Transformation: The Agile Transformation Lead will quickly establish collaborative partnership with key stakeholders to ensure leadership buy-in across both Business and IT. The Supplier will become a strategic partner in organizational roadmapping and structuring to drive increased adoption and higher transformation success. The Lead will provide agile coaching and training at all levels in an emerging Agile environment. The Lead will also assess the current organization and delivery environment and recommend optimal Agile practices tailored to VDSS. The Lead will identify and execute best practices to increase delivery, transparency and quality, and will coordinate with individual enterprise project ScrumMasters to facilitate sprint roadmapping, planning sessions and retrospectives across all enterprise projects. The Lead will support the triage and resolution of critical impediments, and will prepare and deliver effective communications both verbally and orally regarding progress and status for both internal and client teams.

User Experience: The User Experience Director will be responsible for keeping track of customer journeys, interacting with customers across channels and platforms, and coordinating with all internal VDSS stakeholders in order to keep fine-tuning the customer’s experience across VDSS lines of business. The Director will facilitate the creation of customer journey maps, which are visual storylines of every engagement a customer has with VDSS lines of business. The creation of journey maps puts VDSS directly in the mind of the end customer, so they can see and understand the customer’s processes, needs, and perceptions.

Testing Program: The Supplier will coordinate with the VDSS Testing Manager who is responsible for the enterprise testing program, which entails the development of a testing framework (test plans templates, test report templates, test acceptance criteria standards, test case development, etc) to be used by all enterprise projects

Salesforce Technical Program. The Supplier will coordinate with the VDSS Salesforce Technical Program team responsible for administering the Salesforce technical environment, operating the VDSS continuous integration/continuous delivery (CI/CD) pipeline, and enforcing environment standards and practices across all environments (System Integration Test, QA Test, User Acceptance Test, Pre-Production, etc)

1. **Period of Performance:**

Implementation of the solution will occur within 6 months of execution of this SOW.

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

Authorized User’s Location ­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*(City, VA)*

Supplier’s Location \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*(City, State)*

Authorized User’s and/or \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*(Explain)*

Supplier’s Location

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

The roles listed in the table below represent the minimum Supplier personnel requirements for this engagement.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Key Personnel (Y/N)** | **Years of Experience** | **Certifications** | **References Required (Y/N)** |
| Portfolio Manager | Y | 5-7 | PMP (required)  PfMP (desired) | Y |
| OCM Lead | Y | 5-7 | CCMP (desired) | Y |
| Agile Transformation Consultant | Y | 5-7 | Certified Agile Coach (required) | Y |
| User Experience (UX) Director | Y | 5-7 | UX certification (desired) | Y |
| Delivery SMEs | Y | 5-7 |  | Y |

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 |
| Commissioner | Primary POC for the project | 5% |
| Deputy Commissioner, Human Services | Executive stakeholder | 5% |
| Director, Benefit Programs | Business owner, CommonHelp and SNAP Knowledge Base | 5% |
| Director, Family Services | Business owner, CCWIS | 5% |
| Deputy Commissioner, State Programs | Executive stakeholder | 5% |
| Director, Business Operations | Business stakeholder, VELA and CSSM | 5% |
| Director, Child Support Enforcement | Business owner, CSSM | 5% |
| Director, Licensing Programs | Business owner, VELA | 5% |
| CIO | Principle executive for all agency IT Services | 5% |
| Deputy CIO | Second principle for all agency  IT Services | 5% |
| Director, Application Development | Responsible for all agency software development | 5% |
| Director, Enterprise Business Solutions | Responsible for Business Analysis Office (BAO), Project Management Office  (PMO), and Quality Assurance (QA) | 5% |
| PMO Manager | Responsible for PMO | 15% |
| BAO Manager | Responsible for BAO | 15% |
| QA Manager | Responsible for QA standards | 15% |
| Chief Enterprise Architect | Leads enterprise architecture team | 25% |

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** | **Estimated Completion Date** |
| --- | --- | --- |
| Portfolio Vision, Strategy, and Initial Roadmap | Documented portfolio’s scope, objectives, team roles, responsibilities, tools, activities, and cadences. | March 31, 2023 |
| Portfolio Progress Sync | Refined portfolio strategy and roadmap and documentation supporting progress, status, dependencies, and impediments. | April 28, 2023 |
| Portfolio Progress Sync | Refined portfolio strategy and roadmap and documentation supporting progress, status, dependencies, and impediments. | May 31, 2023 |
| Portfolio Progress Sync | Refined portfolio strategy and roadmap and documentation supporting progress, status, dependencies, and impediments. | June 30, 2023 |
| Change Advisory Board (CAB) Recommendations | Review and recommend changes to the CAB to support Agile deliveries | Supplier to propose |
| Transition Plan | Define the transition activities and support staff needed to transition the Digital Transformation Office to VDSS after 6 months | Supplier to propose |
| Software Tools Recommendations | Review and recommend software tools to support the software development and delivery process | Supplier to propose |
| Product Team Recommendations | Provide recommendations on the creation and implementation of cross functional product teams to support VDSS lines of business | Supplier to propose |
| User Journey Maps | Facilitate and provide customer journey maps to document the user experience across VDSS lines of business | Supplier to propose |
| Transformation Office processes & frameworks | Documentation on how the Transformation Office will function | Supplier to propose |
| Supporting tools recommendations | A list of supporting tools for project portfolio management | Supplier to propose |
| Recommended structure for cross functional product teams | Product team descriptions | Supplier to propose |
| CAB structure | Revision to current CAB to accommodate agile product delivery | Supplier to propose |
| Transition Plan | Transition from supplier operated to agency operated transformation office. (Including training, standard operating procedures, templates, and documented policies) | Supplier to propose |
| Staffing & Skills recommendations | Recommendations on staff and skills needed for transformation | Supplier to propose |
| User journey Maps | User journey mapping for 4 selected enterprise initiatives | Supplier to propose |

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

|  |  |
| --- | --- |
| **Deliverable Type** | **Format** |
| Text Document | Microsoft Word (Microsoft 365) |
| Spreadsheets | Microsoft Excel (Microsoft 365) |
| Presentation | Microsoft PowerPoint /  Visio (Microsoft 365) |
| Project Management | Microsoft Project (Microsoft 365) / JIRA / Azure DevOps (format TBD) |

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 *(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 of 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): Agreed upon milestones to be described within the SOW

1. **Project Roles and Responsibilities:**

| **Responsibility Matrix** | **Supplier** | **Authorized User** |
| --- | --- | --- |
| *Developing and update Portfolio-level roadmap* |  |  |
| *Provide portfolio planning input, including project plans, resource allocations, and dependency information* |  | ü |
| *Planning stakeholder management and communications* |  |  |
| *Executing stakeholder communications* |  | ü |
| *Attend regular portfolio syncs and period portfolio reviews* |  | ü |
| *Provide Transformation Office documentation as outlined in paragraph 14 above* | ü |  |

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

Standard CAI Required Background Check

Agency Specific Background Check – DSS 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): As defined in the Scope of Work and Deliverables sections of this SOR.

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 :**

Required as specified below

Not Required

Training Requirements:

*(Specify specific training requirements)*

1. **Documentation:**

Required as specified below

Not Required

Documentation Requirements:

As detailed in Section 10 (Scope of Work) and Section 14 (Milestones and Deliverables) of this SOR

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:**

On an as needed basis, to be coordinated with the Authorized User’s Project Sponsor and Project Manager.

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

The Authorized User may provide furniture and equipment within limited workspace on a temporary basis. Permanent office space, furniture and equipment are the responsibility of the Supplier. While on-site at the project location, the Authorized User will provide access to a copier, fax, the agency LAN and the internet (for up to two connections). Authorized User will also provide temporary desk space. The Supplier must provide any cell phones, personal computers or laptops required by the Supplier team. The VITA technical staff supporting the agency’s network must verify that any personal computers or laptops meet minimum-security configuration standards (e.g., current virus protection) before any equipment may be connected to the agency’s LAN.

Authorized User will also provide access to all documentation for the four referenced projects.