**[Department]  
[Agency]**

**STATEMENT OF OBJECTIVES FOR CLOUD MIGRATION SERVICES:   
MIGRATION EXECUTION AND PROVISIONING OF CLOUD RESOURCES**[This SOO template is to be used for both labor hours for a cloud migration as well as the cloud resources themselves (IaaS, PaaS, etc.) See also GSA’s other SOO templates for examples of solicitations for only the cloud resources.]

# [Month YYYY]

# TEMPLATE

**Introduction and Instructions**

This sample Statement of Objectives (SOO) describes the objectives and tasks for cloud migration services to include: *[Migration Roadmap Execution].*

Offerors shall use this SOO with other applicable portions of the *[RFP/RFQ]* as the basis for preparing their proposal. Offerors shall ensure that all aspects of the SOO are thoroughly addressed in their proposals.

## Point of Contact

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**Contents**

[1. Purpose 4](#_1t3h5sf)

[2. Scope 4](#_4d34og8)

[3. Period and Place of Performance 4](#_2s8eyo1)

[4. Background 5](#_17dp8vu)

[5. Current Environment 5](#_3rdcrjn)

[5.1. Existing/Legacy Environment 6](#_26in1rg)

[5.2. Target Environment 6](#_lnxbz9)

[5.3. Operational Constraints 7](#_35nkun2)

[6. Objectives 7](#_1ksv4uv)

[6.1. Business Objectives 7](#_44sinio)

[6.2. Technical Objectives 8](#_2jxsxqh)

[6.3. Security Objectives 9](#_z337ya)

[6.4. Management Objectives 10](#_3j2qqm3)

[6.5. Administrative Objectives 10](#_1y810tw)

[7. Constraints 10](#_4i7ojhp)

[7.1.](#_2xcytpi) *[Access Control]* 11

[7.2.](#_1ci93xb) *[Authentication]* 11

[7.3.](#_3whwml4) *[Personnel Security Clearances]* 11

[7.4.](#_2bn6wsx) *[Non-disclosure Agreements]* 11

[7.5.](#_qsh70q) *[Accessibility]* 11

[7.6.](#_3as4poj) *[Sensitive and Embargoed Data, etc.]* 11

[7.7.](#_1pxezwc) *[Data isolation requirements or hardware sharing restrictions.]* 11

[8. Requirements Cross-Reference 11](#_49x2ik5)

# Purpose

This Statement of Objectives (SOO) describes the goals that the *[Department/Agency]* expects to achieve with regard to *[migration of applications or services to the cloud]*. The primary goal of this acquisition is to *[migrate Department/Agency applications or services to the cloud]* which will result in *[improvements in efficiency, agility, innovation, and sustainability].*

# Scope

This SOO addresses work associated with the following *[cloud migration implementation]* activities:

1. *[Providing the cloud environment services to host/provide the applications or services.] [For example this could entail the license for the software in a SaaS scenario or the provision of virtual machine and/or cloud storage hosting services in an IaaS/PaaS situation.]*
2. *[Executing the migration of applications or services to the cloud.]*
3. *[Implementing the execution of a multi-step roadmap of cloud migrations for a suite of applications or services – which may also include providing the various cloud hosting services required.]*

Agency strategy for acquiring cloud migration services should align to OMB’s 2018 Federal Cloud Computing strategy, “Cloud Smart.” This policy from OMB supplants 2010’s “Cloud First” strategy and the Data Center Optimization Initiative (DCOI), covered in OMB Memo 16-19. It emphasizes the need for federal agencies to a) ensure that cloud computing technology is a good fit that will provide better mission-focused outcomes and b) intelligently account for the procurement, security, and workforce implications of cloud migration by leveraging industry best practices and cross-government knowledge. [[1]](#footnote-1)

# *[List additional needed services here that will support Department/Agency in these activities].* The *[acquisition vehicle name and number (for instance, GSA Schedule IT70 Cloud Special Item Number (SIN) 132-40]*, issued by *[Issuing Agency],* is hereby incorporated by reference. *[This makes clear that the terms and conditions of any GWAC or Schedule being used are also in effect here.]*Period and Place of Performance

The base Period of Performance will be *[xx (xx)]* months from date of award with *[xx (xx) xx (xx)]* year options. Services will be provided at *[specify location].*

*[The Offeror may offer pricing where migration planning services are conducted in the United States and/or pricing where services could be conducted outside of the United States. Offeror should identify all locations where any services will be conducted and ordering activity data will be located. U.S. Based Prices are prices where the services and all data-at-rest (either primary storage or replicated storage) are conducted and located within the United States. Worldwide Prices are prices where the services and any data-at-rest (either primary storage or replicated storage) are conducted and/or located outside the United States.]* [[2]](#footnote-2)

# Background

Produced by the Office of Management & Budget (OMB), the September 2018 Federal Cloud Computing Strategy, “Cloud Smart,” outlines the impetus and benefits of migrating to cloud services, including cost savings, better security and delivery of faster mission-enabling services. The three complementary pillars of the new strategy integral to promoting cloud adoption are security, procurement and workforce. “Cloud Smart embraces best practices from both the federal government and the private sector, ensuring agencies have the capability to leverage leading solutions to better serve agency mission, drive improved citizen services and increase cyber security.”

The *[Department/Agency]* is in the process of *[readying workloads and applications to migrate to the cloud].* The *[Department/Agency]* target operating model is to *[migrate x services or x%]* to the cloud and/or *[list data center consolidation goals].* Therefore *[Department/Agency]* seeks services to encompass the *[list applicable phases for cloud migration]* for all *[target Department/Agency applications and services, as well as related users, processes, security, and service management].*

The proposed services will support desired outcomes, including:

* + - * *[Successful and complete transition of specified applications, solutions, and services to the cloud.]*
      * *[Consolidated and simplified application and service management and monitoring in the cloud to support cost-effective, secure, and agile IT management.]*

The proposed services will consist of *[providing cloud services (the ongoing IaaS, PaaS, or SaaS services), cloud environment configuration, migration transition and support, user training, cloud environment deployment].* These services will *[list all capabilities necessary to effectively support cloud migration]*. *[All cloud services provided will be required to meet vendor-offered Service Level Agreements (SLAs) as well as the performance criteria described later in section 6. (This applies when cloud services are included in this acquisition.)]*

# Current Environment

*[Provide a brief, high-level description of your agency’s current environment for the target applications or services to be moved to the cloud. This is where the output from earlier cloud migration steps covering Inventory, Application Mapping, and Migration Planning would be utilized in this Migration Execution SOO. Some examples of information elements appropriate to this overview include:]*

* + - * *[Strategic operations or mission objectives]*
      * *[Description of IT organization, infrastructure, etc. relevant to target applications and services]*
      * *[Current cloud solutions and/or technologies*
      * *[List of applications or services to be moved to the cloud including their business purpose and context and service requirements in business terms (e.g. revenue cost of unavailability).]*

## Existing/Legacy Environment

*[Please insert the current state architectural details (diagrams are encouraged) of the target applications or services including the logical operating structures outlining the function of major components as well as related systems that may not be part of the migration . List all connected services and applications documenting all interfaces and dependent systems. Pay careful attention to related systems and services such as identity providers (e.g. Active Directory) and support services (web services, API’s, middleware, etc.) that may remain located beyond the “to-be” cloud environment. Included elements may consist of:]*

* + - * *[Hardware: Servers, including virtual machines, load balancers as appropriate, etc.]*
      * *[Software: Notate operating systems, essential platform and middleware components, software packages, etc.]*
      * *[Capacity Metrics: As appropriate to the applications or services, this may include number and type of users; current storage/database size and required or anticipated capacity; page views, average web page size, and bandwidth statistics for websites; usage cycles, etc.]*
      * *[Network specifics: Existing and/or planned security boundaries, and/or required logical network zones (DMZ’s etc.) as appropriate.]*
      * *[Interfaces: Notate all interfaces to the target applications and services that will be moved to the cloud. Include details for each including the type of interface, business function, frequency of use, and volume of data by number of records and/or aggregate size as appropriate.]*
      * *[Security Categorization: Provide current system impact levels (low, moderate, high) for confidentiality, integrity, and availability as defined in FIPS 199].*
      * *[Configuration Management: Provide appropriate details on Department/Agency configuration management systems and policies.]*

## Target Environment

*[As applicable to your situation and prior planning provide any known details and requirements for your target (“to-be”) state. Be sure to clearly notate the services, applications, and interfaces that are to be provided in the new cloud environment. Example elements provided in 5.1 apply here as well. Additional elements for the “to-be” state include:]*

* + - * *[Operational Responsibility (O&M): Clearly delineate Department/Agency versus vendor responsibility for the operation and maintenance of the target applications and services being migrated to the cloud. What is the expected level of involvement of the government in managing the solution? Consider end user application support, development, backups, help desk, etc. Note any functions currently performed by agency personnel that are expected to be transferred to the vendor.]*
      * *[Software Licensing: Specify expectations for retaining existing, purchasing new, and/or terminating software licenses and whether by the Department/Agency or vendor as appropriate to the migrated applications and services. This should differentiate as appropriate between software utilized to provision cloud hosting services (e.g. VMware employed by hosting provider to deliver a virtual machine) versus software added to such a provided service as part of migrated applications or services (e.g. a database server) versus custom software development performed as part of the migration.]*

## Operational Constraints

*[Provide details on operational constraints to be considered during the migration of the application or services including availability requirements for both the legacy and target cloud environments for all phases of the transition. Consider the impacts of the cessation of legacy system operation and complete final deployment of the target cloud solution. Examples include:]*

* + - * *[Portability/Interoperability: Provide portability and interoperability to allow for ease of transition to alternative cloud service providers. Additional details as available should be provided to or requested from vendor to provide justification and tradeoff analysis for alternatives.]*
      * *[Data Sensitivity: Application or service specific data sensitivity details such as Personally Identifiable Information (PII) should be detailed here.]*

# Objectives

*[This introductory paragraph should state the desired outcome of this acquisition and be based on the scope outlined in Section 2 above, referencing cloud service/environment provisioning (IaaS, PaaS, SaaS hosting platform services) and migration execution services (deployment to operational state) as appropriate.]*

The overall objective is to *[implement the migration of workloads and applications to the cloud, including the provision of the cloud service environment necessary, supported by comprehensive cloud migration transition and support services].* To achieve this, these cloud migration services must *[meet applicable business, technical, security, management, and administrative objectives. Cloud migration services should be aligned with objectives of the enterprise service delivery model, and support the agency’s ability to deliver future sustainable services.]*.

## Business Objectives

* + 1. Provide all support operations necessary to fully migrate and deploy the *[Agency/Department’s target applications and services]* to the cloud*.*
    2. Provide maximum alignment to FDCCI requirements and cloud migration mandates and requirements, amplifying *[Agency/Department’s]* ability to achieve management objectives.
    3. Provide cloud migration services that accommodate considerations from an enterprise perspective including impact on *[Agency/Department]* business units, contracts, management, and technical components *[(application, infrastructure, and security)]. [This should tie to the purpose of the applications or services being migrated and can include users, stakeholders, business hours, and related input and output processes based on the role and business function of the affected agency systems.]*
    4. *[Provide cloud hosting services within specified geographic location (e.g., CONUS/OCONUS, etc.,) for the target applications and services.]*
    5. *[Provide communications plan for all affected parties of the migration(s) to ensure end-user adoption, customer satisfaction, successful organizational process changes, and alignment with Agency/Department’s policies, requirements and goals.]*
    6. *[Provide software licenses consistent with Department/Agency target environment goal state as outlined in Section 5.2.]*

## Technical Objectives

* + 1. Provide all technical advisory services necessary to fully migrate the *[Agency/Department’s target applications and services]* to the cloud*.*
    2. *[Provide cloud environments (e.g., IaaS, PaaS, etc.) for production, integration, development and sandbox purposes to support the complete systems lifecycle.]*
    3. *[Provide post-deployment cloud support and/or governance services. Remember to assign responsibility for authorizing individual instances of provisioning IaaS, etc., and for de-provisioning IaaS, etc., when no longer in use.]*
    4. *[Provide open-standards based technologies whenever possible to provide interoperability. Specific standards that should/must be utilized include:]*
       - *[Open Virtualization Format (OVF) – applicable only to IaaS virtual machines]*
       - *[Cloud Data Management Interface (CDMI)]*
       - *[Open Cloud Computing Interface (OCCI)]*
       - *[other standards as required]*
    5. *[Provide additional resources for bandwidth, storage, software licenses, etc. as required supporting the migration beyond the amount normally planned for operations.]*
    6. *[Provide migration status including milestones and support or implement specified migration testing plans and related rollback capabilities.]*
    7. *[Provide backup, recovery and disaster recovery procedures and processes in the cloud environment for the target applications and services that support the following objectives:]*
       - *[Recovery Point Objective (RPO) – Ability to recover files for any specific day within a rolling xx (xx) month period.]*
       - *[Recovery Time Objective (RTO) – Ability to recover files within xx (xx) hours of request.]*
       - *[Data Backup Location – Data backups maintained or replicated at a site geographically disparate from the production site such that the loss of one data center does not prohibit recovery of data within the prescribed RTO.]*
       - *[Any other relevant details from existing business continuity plans (BCP).]*
    8. *[Provide support for data storage tiers as specified within the target applications and services.]*
    9. Provide complete support for IPv6 within the cloud environments provided.

## Security Objectives

* + 1. Provide support and services in compliance and alignment with Federal Risk and Authorization Management Program (FedRAMP) standardized security assessment, authorization, and continuous monitoring policies as required by the scope of the project. Assessment and Authorization (A&A) activities will be included as part of the migration.
    2. *[Provide migration services regarding security and privacy that are consistent with the NIST Special Publication 800-144 – “Guidelines on Security and Privacy in Public Cloud Computing” or other applicable standards and guidelines.]*
    3. *[Provide a security plan focused on the integration points of end-user authentication (e.g. LDAP), cloud environment management authentication (PIV card), and physical and logical security and certification (e.g. FedRAMP) delivering a single comprehensive solution that can be leveraged across the organization reducing end user confusion and security management complexity. (Applies to situations where cloud services (IaaS, PaaS, etc.,) are part of the acquisition especially when systems integration services are required.)]*
    4. *[Provide a trusted secure communication channel for cloud environment management to support the Government’s PIV Card authentication (dual factor method) of remote access in accordance with OMB M-11-11. (Applies only when cloud services (IaaS, PaaS, etc.,) are part of the acquisition.)]*
    5. *[Provide security for non-standard data transfers both in transit and at rest resulting from the migration of the applications or services to the cloud.]*
    6. *[Provide support for specified auditable events related to the applications or services.]*
    7. *[Provide support personnel who have <clearance: Minimum Background Investigation/Secret/Top Secret> at the vendor’s expense.]*
    8. *[List any additional Security and Privacy standards to which the contractor should conform their service/solution. For example:]* 
       - *[Properly securing the connections between formerly co-located systems, including systems not migrated for business or other reasons.]*
       - *[Implementation of Trusted Internet Connections and similar mandates.]*
       - *[Implementation of [Department/Agency] specific intellectual property rights policy.]*

## Management Objectives

* + 1. Allow the contractor maximum flexibility to innovatively manage program cost, schedule, performance, risks, warranties, contracts and subcontracts, vendors, and data required to deliver effective migration services.
    2. Maintain clear government visibility into program cost, schedule, technical performance, and risk, including periodic reporting.
    3. Provide meaningful reporting and analytics that provide the *[Agency/Department]* with up-to-date and comprehensive information regarding technical and management performance.
    4. *[Provide a brief description on the management of subcontractor relationships and contracts. Outline the roles and responsibilities per party involved in the service and where key responsibilities reside.]*
    5. *[Provide a transition plan detailing milestones, activities, and timelines for the migration services.]*
    6. *[Provide a vendor management plan including risk analysis, evaluation, communication, performance, auditing, and dispute resolution.]*

## Administrative Objectives

* + 1. Provide end-to-end monitoring capability and reporting for service level agreement (SLA) requirements and metrics*. [Provide a proposed SLA and associated terms and conditions that describe methods of compliance with SOO objectives and requirements.] [Key elements covered in the SLA include:]*
       - *[Metrics for the services as measured as the [describe calculation of metric]; not to be less than that proposed within the acquisition vehicle, (e.g., GSA’s IT70) and including definitions.]*
       - *[Metric Time Objectives for tasks]*
       - *[Methodology for ensuring that the Service Level Agreement is met.]*
    2. Provide configuration management information for cloud virtual environment that will integrate with *[Department/Agency]* configuration management system.
    3. *[Provide archived and deleted record data retention consistent with the Department/Agency data retention policy.] [Attach, reference, or specify the applicable policy.]*
    4. *[Provide a draft Quality Assurance Surveillance Plan (QASP) and/or Quality Control Plan (QCP) that shall include details for measuring performance and deliverables with metrics that may include data availability, storage capacity, uptime, etc. These documents are to be correlated with the “as-is” and “to-be” environments provided in Sections 5.1 and 5.2 above.]*

# Constraints

*[Provide any subsections normally used by the Department/Agency that are not covered by the GWAC or Schedule being used (named in Section 2), and as appropriate such as:]*

## *[Access Control]*

## *[Authentication]*

## *[Personnel Security Clearances]*

## *[Non-disclosure Agreements]*

## *[Accessibility]*

*[Requirements for accessibility based on Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d) are determined to be relevant. Information about the Section 508 Electronic and Information Technology (EIT) Accessibility Standards may be obtained via the Web at the following URL:* [*http://www.Section508.gov*](http://www.section508.gov)*.]*

## *[Sensitive and Embargoed Data, etc.]*

## *[Data isolation requirements or hardware sharing restrictions.]*

*[Government owns all data and is to be exportable in a usable format upon termination.]*

# Requirements Cross-Reference

The requirements in this Scope of Objectives can be cross-referenced with the requirements in the *[Acquisition Vehicle - see note in Section 2 regarding GWACs or Schedules]. [If necessary, use the table below to map the SOO objectives to additional requirements that appear in the Acquisition Vehicle].*

**Table 1: SOO to *[Acquisition Vehicle]* Cross-reference**

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| --- | --- |
| SOO Requirement Reference | Acquisition Vehicle Requirement Cross-reference |
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1. [https://cloud.cio.gov/strategy](https://cloud.cio.gov/strategy/) [↑](#footnote-ref-1)
2. Worldwide pricing is only applicable if the work location is not based at the customer’s site [↑](#footnote-ref-2)