

**TRANSFORMATION TWENTY-ONE TOTAL TECHNOLOGY NEXT GENERATION (T4NG)**

**PERFORMANCE WORK STATEMENT (PWS)**

**DEPARTMENT OF VETERANS AFFAIRS**

Office of Information & Technology

Enterprise Program Management Office (EPMO)

**VA Cloud Managed Services and Transition Services**

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# BACKGROUND

The Department of Veteran’s Affairs (VA) was established as an independent agency on July 21, 1930. The Department’s mission is to serve America’s Veterans and their families with dignity and compassion, and to be their principal advocate in ensuring that they receive medical care, benefits, social support, and lasting memorials promoting the health, welfare, and dignity of all Veterans in recognition of their service to this Nation.

The mission of VA’s Office of Information & Technology (OI&T) is to provide seamless, unified Veteran experience through the delivery of state-of-the-art technology and to collaborate with business partners to create the best experience for all Veterans.

To deliver against this mission, and to meet operational goals OI&T requires the ability to efficiently acquire secure cloud computing services on an ongoing basis.

The projected VA Cloud Managed Services and Transition Services (MSTS) capability will provide single cloud intake process for all cloud related services. VA Cloud MSTS will be a partnership between VA and a vendor to define and coordinate enterprise cloud delivery and support. VA Cloud MSTS will:

* Enable VA to acquire and implement the right effective services
* Unify VA cloud projects, vendors, platforms to meet our requirements
* Define and coordinate a secure, integrated cloud environment
* Support applications systems transition to VA enterprise-level cloud computing environment.

Cloud computing is defined by the National Institute of Standards and Technology (NIST) as “a model for enabling convenient, on-demand network access to a shared pool of configurable computing resources (e.g., networks, servers, storage, applications, and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction.” NIST has identified five essential characteristics of cloud computing: on-demand service, broad network access, resource pooling, rapid elasticity, and measured service. VA expects these to lead to cloud computing benefits of cost savings, expedited processing and storage scalability and expedited processing provisioning.

# APPLICABLE DOCUMENTS

The Contractor shall comply with the following documents, in addition to the documents in Paragraph 2.0 in the T4NG Basic Performance Work Statement (PWS), in the performance of this effort:

1. “Veteran Focused Integration Process (VIP) Guide 2.0”, May 2017, <https://www.voa.va.gov/DocumentView.aspx?DocumentID=4371>
2. NIST Special Publication 800-145, NIST Definition of Cloud Computing
3. NIST Special Publication 500-291, NIST Cloud Computing Standards Roadmap
4. Federal Risk and Authorization Management Program (FedRAMP) Concept of Operations, <http://www.gsa.gov/graphics/staffoffices/FedRAMP_CONOPS.pdf>

# SCOPE OF WORK

The Contractor shall define and execute a program to establish VA-wide cloud computing Managed Service capability. These managed cloud services must provide a robust cloud computing environment that supports the entire VA Enterprise; therefore, internal users, mission partners, and Veterans must be provided a robust, agile, interoperable infrastructure that provides connectivity and computing capability to deliver integrated services to Veterans.

The Contractor shall provide managed services that enable VA to tailor the availability and delivery of cloud computing services based on business and technical requirements. The overall enterprise-level cloud computing environment provides the single point for integrating services from each of VA cloud service providers (CSPs).

The Contractor shall provide Transition Services that support new and migrating applications to the defined cloud environment, analyze and provide recommendations and advice for both business and technical functions to manage the use, performance, and synchronized delivery of cloud service offerings with VA, from other federal providers, and from commercial providers to sustain an integrated and controlled multi-cloud provider environment. The Contractor shall provide expertise to eliminate expensive trial-and-error approach by supporting VA in acquiring the most appropriate CSPs services for VA the first time. Additionally, the Contractor shall ensure all NIST standards are met, will also engage with CSPs to verify all service level agreements are met in accordance with the terms and conditions acceptable to the Government, and ensure optimal steady state performance of cloud hosted applications.

The Contractor shall provide overarching project management for this TO and shall support the following initiatives:

* ***Initiative 1: Enterprise Cloud Program Governance, Program Management/Implementation Capability, and Organization Change* –** Establishing and executing processes for governing, managing, and preparing the organization to adapt to the agency’s Cloud Computing efforts and investments.
* ***Initiative 2: Enterprise Cloud Architecture, Design, and Operations*** – Ongoing development and refinement of designs for VA’s Cloud Computing architectures and plans to deliver, manage, operate, and continuously improve VA’s Enterprise Cloud capabilities
* ***Initiative 3: Enterprise Cloud Application Migration*** – Assessment, analysis, planning, and execution support for migrating new and legacy VA applications and services to Cloud Computing.
* ***Initiative 4: Infrastructure Engineering Support*** -  Continuous improvement of VA’s IT infrastructure through data center consolidation, and enhancement and expansion of unified communications.

## APPLICABILITY

This Task Order (TO) effort PWS is within the scope of paragraph(s) 4.2 (Systems/Software Engineering), 4.6 (Enterprise Network), and 4.8 (Operations and Maintenance (O&M)) of the T4NG Basic PWS.

## ORDER TYPE

The effort contains five (5) Firm Fixed Price (FFP) Initiatives with specific deliverables which are described in section 5.1. Tasks in section 5.2 are related to three (3) of the five (5) initiatives however are to be considered as Time and Materials (T&M) order type. Sections 5.3 has Optional task related to two (2) of the 5 initiatives and maybe considered as either FFP or T&M order type.

# PERFORMANCE DETAILS

## PERFORMANCE PERIOD

The Performance of Period (PoP) shall consist of a twelve (12) month base period, during which time the Contractor shall have fifty (50) calendar days from award to fully setup and operationalize cloud services. Any resulting task order shall also include four (4), twelve (12)-month option periods; and one (1), ninety (90)-day optional task for transition out IT-services, and one (1) ninety (90)-day optional task for transition out services. The right to exercise any or all the foregoing options remains within the sole discretion of the Government.

The total task order period of performance shall not exceed 60 months.

## PLACE OF PERFORMANCE

Efforts under this TO shall be performed at both Contractor’s and Government facilities located within the contiguous 48 United States, only. The Contractor shall coordinate with VA Program Manger to determine location for each TO support area. It is anticipated that the majority of efforts under this PWS shall be performed at Contractor facilities.

## TRAVEL OR SPECIAL REQUIREMENTS

Travel is on a cost reimbursable, no fee basis for both the FFP and T&M portions of the PWS. Travel shall be in accordance with the Federal Travel Regulations and requires advanced concurrence by the Contracting Officer’s Representative (COR). Each Contractor invoice shall include copies of all receipts that support the travel costs claimed in the invoice.

Local travel within a 50-mile radius from the Contractor’s facility is considered the cost of doing business and will not be reimbursed. This includes travel, subsistence, and associated labor charges for travel time.

Travel performed for personal convenience and daily travel to and from work at the Contractor’s facility will not be reimbursed.

## CONTRACT MANAGEMENT

All requirements of Sections 7.0 and 8.0 of the T4NG Basic PWS apply to this effort. This TO shall be addressed in the Contractor’s Progress, Status and Management Report (CPSMR) as set forth in the T4NG Basic contract.

## GOVERNMENT FURNISHED PROPERTY / INFORMATION

The VA COR will provide the following Government Furnished Information (GFI) for performance of this TO:

1. VIP data and documentation
2. Access to VA Project Management and Operational Tools and Repositories including:
   1. VA Enterprise Cloud Operational Tool (VAECOT)
   2. Rational Tools
   3. Primavera
   4. Enterprise Cloud Services SharePoint site access
   5. VA Account and Network Access (Virtual Private Network (VPN), or Citrix Access Gateway)
   6. VA email account
   7. All relevant project documents
   8. Veterans Health Information Systems and Technology Architecture (VistA) Manuals- <http://www.va.gov/vdl/application.asp?appid=40>

The Government has determined that remote access solutions involving Citrix Access Gateway (CAG) have proven to be an unsatisfactory access method to complete the tasks on this specific TO. The Government also understands that GFE is limited to Contractors requiring direct access to the network to: access development environments; install, configure and run TRM-approved software and tools; upload/download/ manipulate code, run scripts, apply patches, etc.; configure and change system settings; check logs, troubleshoot/debug, and test/QA.

In limited instances, and when in the Government’s interest, Government Furnished Equipment laptops may be provided where Contractor Furnished Equipment is either insufficient or not permitted. GFE Laptop shall be Intel core i7 processor and 16 GB RAM minimum (or equivalent). The Contractor shall pick up GFE at a location specified by VA.

The Government will not provide IT accessories including but not limited to Mobile Wi-Fi hotspots/wireless access points, additional or specialized keyboards or mice, laptop bags, extra charging cables, extra PIV readers, peripheral devices, additional RAM, etc. The Contractor is responsible for providing these types of IT accessories in support of the TO as necessary and any VA installation required for these IT accessories shall be coordinated with the COR.

## SECURITY AND PRIVACY

The Contractor shall provide a Security Point of Contact as part of its program management organization to oversee all aspects of program level administrative security in accordance with VA requirements per the delivery schedule. The Contractor shall demonstrate comprehensive and effective risk management processes in association with its services that are consistent with NIST Special Publication 800-161 – “Supply Chain Risk Management Practices for Federal Information Systems and Organizations”. The Contractor shall support VA in verifying and reporting that VA security requirements are documented in the contract between cloud service providers and VA.

All requirements in Section 6.0 of the T4NG Basic PWS apply to this effort. Specific TO requirements relating to Addendum B, Section B4.0 paragraphs j and k supersede the corresponding T4NG Basic PWS paragraphs, and are as follows in Addendum B.

1. The vendor shall notify VA within 24 hours of the discovery or disclosure of successful exploits of the vulnerability which can compromise the security of the Systems (including the confidentiality or integrity of its data and operations, or the availability of the system). Such issues shall be remediated as quickly as is practical, based upon the severity of the incident.
2. When the Security Fixes involve installing third party patches (such as Microsoft OS patches or Adobe Acrobat), the vendor will provide written notice to VA that the patch has been validated as not affecting the Systems within 10 working days. When the vendor is responsible for operations or maintenance of the Systems,they shall apply the Security Fixes based upon the requirements identified within the TO.

4.6.1 Position Sensitivity and Background Investigation Requirements by Task

The position sensitivity and the level of background investigation commensurate with the required level of access for the following tasks within the PWS are:

| **Task Number** | **Tier1 / Low / NACI** | **Tier 2 / Moderate / MBI** | **Tier 4 / High / BI** |
| --- | --- | --- | --- |
| 5.1.1 |  |  |  |
| 5.1.2 |  |  |  |
| 5.1.3 |  |  |  |
| 5.1.4 |  |  |  |
| 5.1.5 |  |  |  |
| 5.2.1 |  |  |  |
| 5.2.2 |  |  |  |
| 5.2.3 |  |  |  |
| 5.3.1 |  |  |  |
| 6.1 |  |  |  |
| 6.2 |  |  |  |

The Tasks identified above and the resulting Position Sensitivity and Background Investigation requirements identify, in effect, the Background Investigation requirements for Contractor individuals, based upon the tasks the Contractor individual will be working. The submitted Contractor Staff Roster must indicate the required Background Investigation Level for each Contractor individual based upon the tasks the Contractor individual will be working, in accordance with its submitted proposal.

# SPECIFIC TASKS AND DELIVERABLES

The Contractor shall perform the following specific tasks as part of VA Cloud Managed Services and Transition Services effort.

## FIRM FIXED PRICE (FFP) TASKS AND DELIVERABLES

### Contractor Project Management

The Contractor shall provide project management support, as detailed below, in compliance with VA management policies and guidelines such as Veteran-Focused Integrated Process (VIP).

The Contractor shall identify to VA COR a Contractor Program Manager that shall be the primary contact point for all contractor programmatic issues, concerns, and status.

#### Develop and Maintain a Contractor Project Management Plan

The Contractor shall deliver and maintain a Contractor Project Management Plan (CPMP). The CPMP shall define the Contractor’s detailed approach, timeline, and tools to be used in the execution of the task order. The CPMP shall describe the Contractor’s plans to support task order and includes an integrated master schedule (IMS) in MS Project, detailing tasks, milestones, deliverables, risks, resources, and dependencies. The CPMP should take the form of both a narrative and graphic format.  The CPMP shall also include how the Contractor shall coordinate and execute planned, routine, and ad hoc data collection and reporting requirements as identified within the task order and as defined by VA Program Managers in support of specific areas defined in the PWS paragraph Section 5.0. The initial baseline CPMP shall be concurred upon. The Contractor shall update and maintain the CPMP throughout the PoP.

Deliverables

1. Contractor Project Management Plan
2. Integrated Master Schedule

#### Conduct Contractor Onboarding and Offboarding

The VA Contractor Onboarding Process ensures that the Contractor has satisfied all VA onboarding guidelines and requirements (e.g., mandatory and role-based training certificates, rules of behavior, background investigation request, PIV application) and are eligible and have the government furnished information, government furnished equipment, and physical and logical access necessary to complete the TO.

The Contractor shall perform the following tasks:

1. Assign a single Contractor Onboarding Coordinator to work with VA COR to identify contractor staff roles and specific support areas; determine contractor onboarding requirements; gather and provide required onboarding forms and applications; ensure onboarding requirements are satisfied; and monitor and track onboarding status.
2. Notify VA COR fifteen days prior to the individual’s desired start date, and provide all VA onboarding forms and certificates. All exceptions shall be submitted in writing to VA COR for approval with justification and a target date for completing VA onboarding requirements.
3. Complete VA Mandatory training such as VA Privacy and Information Security Awareness and Health Insurance Portability and Accountability Act (HIPAA) training and submit all TMS training completion certificates. The Contractor shall provide signed copies of the Contractor Rules of Behavior in accordance with Section 9, Training, from Appendix C of VA Handbook 6500.6, “Contract Security”. Failure to complete the mandatory annual training and sign the Rules of Behavior annually, within the timeframe required, is grounds for suspension or termination of all physical or electronic access privileges and removal from work on the contract until the training and documents are complete.
4. Within 48 hours of starting work on the task, submit status of VA Privacy and Information Security Awareness and HIPAA training, and Rules of Behavior for all contractor individuals engaged on the task. The status reporting shall identify a single Contractor Onboarding Coordinator, the names of all personnel engaged on the task, their initial training date for VA Privacy and Information Security training, and their next required training date. The Contractor shall complete VA Privacy and Information Security training annually fifteen days (15) prior to VA mandatory date.
5. Deliver within ten (10) days of task order award and weekly updates, a Contractor Onboarding Report to VA COR that tracks for each Contractor staff the status on task, BI level and status, PIV Card Status (and expiration date), Privacy and Security Training and ROB sign date, and any risks/issues. The Contractor Onboarding Coordinator shall report all issues to VA COR with a plan and timeline to resolve. The Contractor shall submit weekly status of onboarding requirements identified by VA COR and each individual contractor’s satisfaction of those requirements.
6. Ensure all individual contractor personnel complete the VA Offboarding Process. This includes return to VA COR all VA credentials (e.g., PIV card) from employees upon separation from the TO.

#### Submit Monthly Progress Reports

In addition to the information required by the CPSMR set forth in paragraph 4.4 above, the Contractor shall detail performance against the schedule, accomplishments, risks, components for project execution, including developing and planning resource assignments and allocations, developing program status reports and project reviews, and managing and tracking project deliverables.

The CPSMR shall include the following additional data elements, for each activity within the task order and approved CPMP:

1. Task Order Support Area
2. Program and Project specific activities, achievements and impact to address planned, in-progress and completed work
3. Status for any previous and / or new issues or risks, including possible solutions and any actions required of the Government and/or Contractor to resolve or mitigate any identified issue, including a plan and timeframe for resolution
4. Current activity schedule overlaid on original IMS identifying delays or advancement of milestones
5. Current expenditures overlaid over the original budget identifying deviations for planned vs actuals
6. Workforce staffing plan indicating current staff and staffing changes
7. Identify any planned travel and justification
8. Listing of all deliverables – formal and informal – provided during the reporting period

#### Communicate Regularly and As Needed

The Contractor shall schedule and conduct a regular meeting or meetings as agreed with VA Program Leader to review program status.

The Contractor shall perform the following tasks:

1. Continuously monitor performance and report any deviation from the CMP to the COR and PgM/PM during routine, regular communications
2. Respond to all COR queries related to project milestones and schedule within four (4) business hours of receipt of written request
3. Provide program related ad hoc updates, briefings and or briefing support as requested

#### Conduct Technical Kick-Off Meeting

The Contractor shall hold a technical kickoff meeting within 10 days after TO award. The purpose of the Kick-Off meeting is to craft an understanding between VA and the contractor of project approach, major actions, and schedule for key milestones and deliverables. The Contractor shall present, for review and approval by the Government, the details of the intended approach, a draft Contractor Project Management Plan (CPMP), and master project schedule with key milestones. The Contractor shall specify dates, locations (can be virtual), agenda (shall be provided to all attendees at least five (5) calendar days prior to the meeting), and meeting minutes (shall be provided to all attendees within three (3) calendar days after the meeting). The Contractor shall invite the Contracting Officer (CO), Contract Specialist (CS), COR, and VA PM at minimum, to the Kick-Off meeting.

Deliverables

1. Kick off Meeting Deck

### [Initiative 1: Enterprise Cloud Program Governance](#_Toc487203620), Program Management/Implementation Capability and Organization Change

The Contractor shall provide VA a successful transition to the efficient and effective use of cloud as the primary storage and compute solution set. The Contractor shall deliver not only an understanding of the technology, but a comprehensive establishment of Cloud governance and critical operating elements to include: workflows, processes, management, decision authority, workforce support and structure. Additionally, the Contractor shall integrate this governance model seamlessly with existing Enterprise IT governance, IT operating models addressing processes, policies, and boards and tools, which will require a concerted organization change effort.

#### Support Establishment of VA Cloud Computing Management Office

The Contractor shall support the establishment and operation of VA Enterprise Cloud Computing Management Office responsible for ensuring alignment to and implementation of VA’s cloud strategy, operating the processes that enable use of cloud solutions, managing the cloud program to ensure all projects are aligned to the larger program, program performance and outcomes measures and implementation of continuous improvement to enable VA’s cloud strategic objectives and vision.

The Contractor shall perform the following tasks:

1. Collaborate with VA to define an operational flow, skills, roles and structure for the Cloud Computing Management Office
2. Prepare a Cloud Program Management Operations Plan that defines the standard, repeatable management approach and processes to manage VA’s use of cloud computing capabilities.
3. Define specific, measurable operational metrics for cloud life cycle and program outcomes; implement process for collection, analysis and driving relating actions
4. Develop and maintain transition strategies, documents, and communications to move from the as-is operating environment to the to-be operating environment. The Contractor shall coordinate and support the execution of transition strategy and adoption of management capabilities.
5. Develop standard templates and techniques, and recommend existing VA tools and repositories to be used to support portfolio management processes.
6. Collaborate with VA Program Manager, or designee, to establish and conduct regular management and operational reviews to assess the effectiveness of management approaches and processes; the review shall include but is not limited to: stakeholder feedback, lessons learned, performance results, metrics and outcomes.
7. Engage and coordinate with VA Project Managers for cloud development and migration initiatives to ensure cloud project plans comply with VA enterprise cloud management guidelines, standards, and processes.
8. Monitor and track cloud acquisition initiatives to ensure consistency across acquisition planning efforts
9. Develop and maintain communications (e.g., briefings, memos, documents, and artifacts) that provides relevant, consistent, accurate, and reliable information to support the organization’s adoption and application of management guidelines, processes, and requirements.

**Deliverables**

1. Cloud Program Management Operations Plan

#### Establish VA Cloud Governance

The Contractor shall develop and establish a sustainable VA cloud governance model that informs timely, effective, and efficient decision making for cloud computing.

The Contractor shall perform the following tasks:

1. Define the governance structure/governing bodies, processes, decision authorities, roles/responsibilities, decision events/points/gates, and required data/outputs.
2. Ensure the governance model address key strategic and tactical decisions to include, but not limited to:
3. Establishing holding others accountable to standardized cloud architectures, technology policies and operational plan
4. Managing and controlling change to enterprise-level, cloud configuration items
5. Monitoring and controlling performance towards achieving VA strategic objectives and cloud vision
6. Resolving impediments to optimizing the use of and migration to cloud computing as raised to the governance body
7. Identify and formalize integration with existing VA governance and management processes and tools
8. Aligned with the Organization Change Management tasks, establish implement governance model as defined. The Contractor shall provide planning, coordination, facilitation, and meeting management support for the governing bodies as determined by VA Program Manager.
9. Conduct semi-annual reviews of VA Governance Plan with VA Program Manager to support continuous improvement and alignment with VA management guidelines and requirements.

**Deliverables**

1. Cloud Governance Plan and Process Documentation
2. Cloud Governance Implementation Strategy

#### Support Cloud Acquisition Planning

The Contractor shall provide independent, conflict-free recommendations for acquisitions required to execute management of the Cloud Program across VA. Acquisition planning support includes initial development of business case and related recommendations defining the need for acquisition and the subsequent planning, solicitation development, administration, and close-out of the portfolio’s acquisitions.

The Contractor shall perform the following tasks:

1. Develop business case recommendations to enable a data driven decisions to determine if an acquisition is the appropriate course of action. The recommendations shall include but may not be limited to:
   1. Declaration of how the recommendation aligns with VAEC Cloud Acquisition Strategy and VA acquisition policies and guidelines
   2. Market research to inform the requirements development
   3. Support to the review, analysis and elaboration of business requirements to define who, what, where, when, why and how of the business needs
   4. Preparing Impact analyses to highlight and communicate the potential consequences and constraints of cloud procurement options.
2. Compile and share information on potential solutions prior to PWS development; this task may include but is not limited to:
3. Coordinate vendor technology demonstrations, bake-offs, and proof of concepts
4. Develop requests for information (RFIs) to inform the development of acquisition requirements
5. Provide advisory support for project level acquisition planning activities, contribute to project acquisition planning documents and artifacts to include but not limited to:
6. Support development of acquisition documents such as performance work statements to create actionable acquisition packages that satisfy federal and VA acquisition policies, guidelines and standard. Recommend technical, functional and performance characteristics of work to be performed and delivered in requirements documents.
7. Provide cost and labor estimates in support of an Independent Government Cost Estimate (IGCE).
8. Recommend technical evaluation criteria and plans that serve as inputs for acquisition source selection.
9. Support development of requests to secure funding.
10. Monitor and track acquisition planning to ensure that procurement management practices are completed in compliance with federal and VA acquisition guidelines, and meet planning timelines.
11. Maintain an acquisition planning tracker that tracks all procurement efforts from pre-solicitation through contract closeout.

#### Provide Organizational Change Management

The Contractor shall establish a Strategic Organization Change Management (OCM) work-stream to provide expert advice, clarifications, recommendations, and/or explanation related to managing change associated with the implementation of the cloud program. The OCM work-stream shall collaborate with other work streams and each of the initiatives as defined in this PWS to ensure an integrated, consistent incorporation of organization change principles, communications, training activities. The Contractor shall develop organization change management, communications, training and related materials, processes, capabilities, and competencies to support establishment of VA’s Cloud Program Office, governance structure and all activities associated with the implementation of the Cloud Program.

The Contractor shall perform the following tasks:

1. Develop, maintain, and implement an OCM strategy focused on optimizing user acceptance and technology adoption.
   1. The OCM strategy shall address preparation for the change(s), and any impacts and steps for execution associated with changes needed to implement cloud services, telecommunications, and network modernization.
   2. The OCM strategy shall have an emphasis upon identifying process, policy and procedural changes as they pertain to cloud implementation with focus on acquisition and security. The OCM strategy will include development of recommendations to VA regarding the strategic path forward as well as specific service implementations, and the actual execution of those recommendations.
   3. The organizational change strategy shall also address changes and impacts of adopting a DevOps approach to Cloud-Native software solution development, integration, testing, and deployment, with seamless visibility and traceability.
2. Develop, maintain and implement an integrated communications plan to include; leveraging stakeholder analysis to address opportunities and concerns using varied methods, mediums and tailored messages; and measure communications impact.
3. Develop a stakeholder analysis to address all populations impacted by VA’s cloud first strategy, to include categories for OI&T, broader VA and external stakeholders. The analysis shall also include recommendations to VA regarding the engagement and communication required to increase successful adoption and streamline implementation for each stakeholder population.
4. Collaborate with OI&T’s training organization to develop a cloud specific training plan and determine curriculum gaps. Develop actionable recommendations to address training requirements.

**Deliverables**

1. OCM Strategy
2. Integrated Communications Plan
3. Stakeholder Analysis
4. Cloud Specific Training Plan

#### Develop and Maintain Cloud Program Strategy/Roadmap

The Contractor shall develop and maintain VA Enterprise Cloud Computing strategic direction and the delivery of cloud computing capabilities to achieve that future vision, and strategic goals/objectives.

The Contractor shall perform the following tasks:

1. Develop and maintain a VA Enterprise Cloud Computing Strategic Plan and Roadmap that sets the strategic direction for VA cloud computing. This plan shall define VA’s future vision, strategic goals/objectives, and the planned strategies to achieve those objectives. The Contractor shall build upon and align with existing VA enterprise strategies, roadmaps, and plans.
2. Analyze and assess current cloud computing environment to identify cloud computing capability needs and gaps. The Contractor shall conduct analysis of alternatives to recommend a strategy/option for addressing capability needs and gaps. This shall include but is not limited to researching and assessing costs and benefits of each alternative, risks/issues, and dependencies.
3. Support the development of detailed plans to execute the cloud computing strategies.

**Deliverables**

1. Cloud Computing Strategic Plan and Roadmap
2. Cloud Computing Gap Analysis
3. Cloud Computing Analysis of Alternatives

### Initiative 2: Enterprise Cloud Architecture, Design, and Operations

The Contractor shall provide cloud architecture, requirements elaboration, design and operations support necessary to operate, manage, and continuously improve VA’s cloud computing capabilities.

#### Develop and Maintain VA Cloud Architecture and Design

The Contractor shall support the development, review, refinement, and update of the VA Cloud Architecture that documents the current cloud architecture and defines the target architecture needed to achieve the cloud vision.

The Contractor shall provide subject matter expertise to cloud computing projects and initiatives to review and inform the development of high-level solution architectures and designs. The Contractor shall coordinate with compliance and alignment organizations/groups to ensure that cloud projects/initiatives align with Federal Enterprise Architecture Framework, One-VA Enterprise Architecture, and other federal and VA architecture and system policies, standards, and guidelines. The Contractor shall ensure re-use of architecture assets and use open standards, where possible.

The Contractor shall conduct the following tasks:

1. *Cloud Architecture Vision -* The Contractor shall develop, review, and maintain the cloud architecture visualization of the future state and benefits of VA cloud computing. This Cloud Architecture Vision shall enable the business goals/objectives, respond to strategic drivers, and provide a reference for solutions architectures.
2. *Cloud Architecture Framework -* The Contractor shall develop, review, and maintain the Cloud Architecture Framework that defines VA’s approach, standardized architecture definitions, principles, and processes that will inform cloud architecture work. The Cloud Architecture Framework shall include components such as the architecture, front end/back-end platforms (client, servers, applications, storage), enterprise cloud based delivery solution, VAECOT, and network (internet, intranet, intercloud).
3. *Cloud Reference Architecture –* The Contractor shall develop and maintain the Cloud Reference Architecture that defines the major actors (e.g., cloud broker, cloud service provider, consumer) and functions in VA’s cloud computing environment. The Contractor shall establish a common understanding of VA’s requirements, uses, characteristics and standards, that may be used to support the assessment, design, implementation, and maintenance of cloud computing capabilities. The Contractor shall develop, maintain, and communicate the framework using both narrative (documents/artifacts, briefings) and visuals (architecture diagrams, models).
4. *Cloud Business Architecture -* The Contractor shall develop, review, and maintain the Cloud Business Architecture that establishes a common understanding of the cloud’s business value and its alignment with VA’s strategic objectives. The Contractor shall develop/maintain business architecture diagrams that depict the business footprint, business services/information, events, and functional decomposition/capabilities.
5. *Cloud Technology Architecture -* The Contractor shall develop, review, and maintain the Cloud Technology Architecture that establishes a common understanding of VA’s technology specifications, models, and guidelines. The Contractor shall develop and maintain technology architecture diagrams that depict the environment/location, network computing, hardware, and processing.
6. *Cloud Target Architecture -* The Contractor shall develop, review, and maintain Cloud Target Architecture that defines the future state architecture for VA cloud computing. The Contractor shall develop and maintain target architecture diagrams. The Contractor shall recommend architecture strategies to achieve the Cloud Target Architecture.
7. *Cloud Architecture and Technical Reviews -* The Contractor shall conduct or support detailed architecture and technical reviews of existing, planned, and target architectures in support of the VA cloud governance model. The Contractor shall provide an Architecture and Technical Review Summary Report of review outcomes, actions plans, dispositions, and risks/issues. The Contractor shall support and provide subject matter expertise for reviews and assessments cloud project level, architectures and designs. The Contractor shall ensure alignment with VA cloud architecture and design standards and guidelines. The Contractor shall identify gaps, recommend improvements, develop action plans, and assist in addressing all actions and risks/issues that are identified.
8. *Cloud Architecture Continuous Improvement -* The Contractor shall conduct a quarterly assessment of VA Cloud Architecture to recommend improvement opportunities for streamlining, integrating, enhancing and decommissioning. The Contractor shall leverage emerging technologies, cloud standards, and best practices to continuously improve (e.g., security, scalability, efficiency, continuous deployment, recovery, and cost effectiveness) VA Cloud Architecture. The Contractor shall develop and maintain a Cloud Architecture Improvement Plan that define strategies and actions needed to continuously improve the architecture. The Contractor shall support the execution of those improvement plans.
9. *Cloud Architecture Change Management -* The Contractor shall establish the Cloud Architecture Change Management Process for the new enterprise architecture baseline. This process shall support all baseline changes such as new developments in technology and changes in the business environment, and for determining whether to formally initiate a new architecture evolution cycle.

**Deliverables**

1. VA Cloud Architecture Vision
2. VA Cloud Architecture Framework
3. VA Cloud Reference Architecture
4. Cloud Business Architecture
5. Cloud Technology Architecture
6. Cloud Target Architecture
7. Architecture and Technical Review Summary Report
8. VA Cloud Architecture Improvement Plan

#### Support VA Cloud Operations Planning

The Contractor shall operate, maintain, and refine VA’s cloud computing environment to ensure the continuous improvement in the delivery of cloud computing capabilities.

The Contractor shall perform the following cloud operations planning tasks:

1. Maintain and assist in the adoption of the Cloud Technical Operating Model that defines operating processes and procedures, to continuously improve the program, technical, and operational framework required to effectively and efficiently deliver and manage cloud computing capabilities. The Contractor shall:
   1. Update to reflect new or changed services for inclusion in the operational model. The Contractor shall assist in documenting the new request, analyzing the operational impacts, and determine the resources required to offer service.
   2. Conduct a quarterly assessment of the Cloud Technical Operational Model, document lessons learned, feedback, and recommend continuous improvements.
   3. Develop and maintain operating communications using both written (e.g., documents, memos, emails) and verbal methods.
   4. Recommend and support Continuous Integration, Continuous Deployment, Infrastructure-as-Code and related DevOps, Security, and Automation for applications developers.
2. Provide training and supporting materials (e.g., briefings, training documents) on the policies, standards, guidelines, process and tools. The Contractor shall provide consultative operational expertise and support for implementation, enhancement, and migration of services to the cloud.
3. Utilize VA Enterprise Cloud Operational Tools (VAECOT) and existing VA tools and repositories, where possible, to provide operational services.
4. Identify, configure, and adopt tools to perform cloud operations tasks and obtain approval by VA COR and VA Program Manager.
5. Assist in employing VAECOT and underlying CSP management interfaces including training, adoption, configuration, and maintenance of the tools.
6. Assess VAECOT and identify gaps/issues and recommend continuous improvements for streamlining, integrating, enhancing, replacing, and decommissioning services and tools. The Contractor shall recommend VAECOT enhancements.
7. Provide the following shared service for cloud operational planning:
8. *Decision Management Framework -* The Contractor shall develop and maintain an automated, Cloud Decision Management Framework that informs the analysis of options (logic to be automated wherever possible); selection of the most appropriate/optimal service provider, design, and configuration for a given requirement; and migration and deployment planning of VA target applications and services.
9. *Demand Management -* The Contractor shall provide Demand Management service to forecast, plan for and manage the demand for cloud services. The Contractor shall provide develop, execute, and maintain the Cloud Demand Management Plan, as defined in the Cloud Computing Program Management Plan, that describes the approach, processes, and tools for monitoring, analyzing, and reporting on cloud customer usage and demand; forecasting future demand for services; and defining strategies to satisfying service demand and influencing demand.
10. *Capacity Management –* The Contractor shall provide Capacity Management service to monitor cloud resource use and inform VA management capacity optimization and planning functions. The Contractor shall support end to end cloud capacity, demand, utilization, and performance, and solution delivery of VA cloud environments and their underlying components (e.g., unified communications, network modernization). The Contractor shall develop, execute, and maintain the Cloud Capacity Management Plan, as defined in the Cloud Computing Program Management Plan that defines the approach, processes, and tools for planning cloud computing capacity (e.g., storage, computer hardware, software, and connection infrastructure resources). The Contractor shall review, analyze, and report on all cloud service and infrastructure Capacity Management Plans.
11. *Financial Management -* The Contractor shall provide Financial Management service to inform decisions when deciding about changes to VA cloud computing. The Contractor shall develop, execute, and maintain the Cloud Financial Management Plan, as defined in the Cloud Computing Program Management Plan, that defines the approach, processes, and tools used to establish financial management support structures that include financial budget planning, financial analysis, and reporting.
12. *Performance Management* - The Contractor shall provide Performance Management support to gauge progress towards achieving strategic objectives and satisfying service level/operational agreements. The Contractor shall develop, execute, and maintain the Cloud Performance Management Plan, as defined in the Cloud Computing Program Management Plan, that defines the approach, processes, and tools for monitoring, measuring, analyzing and reporting on all service and infrastructure components performance management in support of providing peak processing, optimization, dynamic management. The Contractor shall develop/maintain a Cloud Performance Management Plan that defines the approach, processes, and tools.
13. *Service Provisioning* - The Contractor shall provide Service Provisioning service to provision core cloud computing services under the following CSPs/VM standards: Amazon Web Services (AWS), Microsoft Azure, OpenStack, and VMWare. The Contractor shall automate (wherever possible), maintain, monitor, and report on service provisioning requests in support of end to end standardized instantiation and fulfillment of service request instances, including self-service instances.
14. *Service Catalog Management* - The Contractor shall provide Service Catalog Management service to provide a web-based administrative interface for ordering services across all Cloud Service Providers (CSPs) that are part VA Enterprise Cloud Environment. The Contractor shall create, automate, maintenance, monitor and report on of all content in the catalog in support of end users informed decision making.
15. *CSP Portfolio Management* –The Contractor shall assist with CSP Portfolio Management service to create, manage, and improve CSP portfolio. The Contractor shall work with VA to define, analyze, approve, and review all new and/or changed CSP offerings.
16. *Service Tracking* - The Contractor shall provide Service Tracking service to maintain, monitor, and report of all workflow/statuses/history segregated and secured from business units related to initiating, fulfillment, billing, and delivery of Contract Line Item Numbers (CLINs).
17. *Lifecycle Management. -* The Contractor shall provide Lifecycle Management service to provide web-based administrative interface, lifecycle management functions for all manually or automated provisioned components of VA cloud computing.
18. *Orchestration/Workflow* - The Contractor shall provide Orchestration and Workflow service to provide a web-based administrative interface for management of service templates supporting the automated arrangement, coordination, and management of computer systems and services (orchestration). The Contractor shall create and manage workflows.
19. Change and Configuration Management - The Contractor shall provide Change and Configuration Management core service and script control in compliance with VA Enterprise Change and Configuration Management processes and tools.
20. *Service Validation and Testing* –The Contactor shall provide Service Validation and Testing service to test and validate developed solutions prior to release. The Contractor shall provide the quality assurance of rolled out cloud releases and release components by defining test procedures, content, cases, and conditions for component, integration, and acceptance testing to ensure problem free operation within the production environment.
21. *Release and Deployment* - The Contractor shall provide Release and Deployment service to rollout Cloud Services, updates, and releases to the production environment. The Contractor shall comply with VA Release Management processes and guidelines, including processing the quality insurance of rolled out cloud releases and release components by defining test procedures, content, cases, and conditions for component, integration, and acceptance testing to ensure problem free operation within the production environment utilizing VAEC Operational Tools.
22. *Security* - The Contractor shall plan, develop, implement, configure, test, provide on-going validation, administer and report on cloud security capabilities, technologies, tools, risks, vulnerabilities, events and incidents to include implemented enterprise security controls, ensuring on-going compliance with federal and VA Policies, standards and guidelines. These security activities, procedures, practices, capabilities, technologies, tools and security controls should include and align with VA’s enterprise security architecture framework.
23. *Billing/Chargeback* - The Contractor shall provide Billing and/or Chargebacks service to design, implement, and operate the processes to instantiate the governance-sanctioned/scoped billing/chargeback framework. The Contractor shall create, maintain, monitor, and report on a financial chart of accounts, accounting codes, cost accounting, usage metering, billings, invoicing, reconciliations, etc. in support of all service contracts and Service Level Agreements.
24. *3rd Party API Integration* - The Contractor shall provide 3rd Party API Integration service to arrange, coordinate, and manage the cloud service, infrastructure, platform API integration, and enabling utility service management capabilities. The Contractor shall provide a method for third parties to integrate software to a cloud application. The Contractor shall coordinate with ITOPS, NSOC, and OIS and integrate with their processes and tools.
25. *External Cloud Connector* - The Contractor shall provide External Cloud Connectors service to provide a web-based interface to support external cloud service discovery. The Contractor shall arrange, coordinate, and manage Cloud Service and Infrastructure connectivity. The Contractor shall integrate with ITOPS and NSOC processes and tools.
26. *Event Management -* The Contractor shall provide Event Management service to provide proactive and responsive event resolution to minimize service and infrastructure impact. Events include, but are not limited to, error reports, security, and system outages. The Contractor shall provide ongoing maintenance of event monitoring, event filtering and correlation, 2nd level correlation & response selection, and regular event review & closure. The Contractor shall perform the following tasks:
    * 1. *Maintenance of Event Monitoring -* Set up and maintain the mechanisms for generating meaningful Cloud Events and alerts based on rules for filtering and correlating
      2. *Event Filtering and Correlation -* Filter out Cloud Events which are merely informational and can be ignored, and to communicate any Warning and Exception Events
      3. *2nd Level Correlation and Response Selection -* Interpret the meaning of a Cloud Event and select a suitable response if required
      4. *Event Review and Closure -* Check if Cloud Events have been handled appropriately and may be closed. The Contractor shall ensure that the Cloud Event logs are analyzed to identify trends or patterns which suggest corrective action must be taken.
27. *Contract/Service Level Agreement (SLA) Management* - The Contractor shall provide Contracts and Service Level Agreements (SLA) service to provide continual identification, monitoring and review of the levels of IT services specified in the service-level agreements (SLAs) to achieve required levels and service quality. The Contractor shall create, maintain, monitor, and report on all Contract Line Item Numbers (CLINs), Contracts, Vendors, Organizational Level Agreements (OLAs) & Operating Metrics in support of all service ordering and tracking.
28. *Licensing Management -* The Contractor shall provide Licensing Management service. The Contractor shall recommend, create, automate (wherever possible), maintain, monitor, analyze, and report on all cloud licensing contract, terms/conditions, usage, and utilization compliance and cost impact assessments. The Contractor shall coordinate with other VA contractors to ensure proper recording of license use under other VA licensing contract vehicles and enterprise agreements.
29. *Backup/Archiving/Patch -* The Contractor shall provide Backup/Archiving/Patch capabilities to monitor and control the cloud services and their underlying infrastructure. The Contractor shall develop and maintain VA Enterprise Cloud Backup/Archiving/Patching Process that includes job scheduling, backup and restore activities, and routine maintenance.
30. *Asset Management* - The Contractor shall provide Cloud Asset Management, including the full life cycle management and strategic decision making for the Cloud environment combining financial, contractual, and inventory functions. The Contractor shall develop and maintain processes to monitor and report on real-time Cloud Asset Lifecycle activities related to all elements of services, software, hardware, contracts, coverage periods, licensing, etc. that make up the cloud environment. The Contractor shall comply with VA IT Asset Management processes and tools (where possible).
31. *Service Continuity -* The Contractor shall provide VAEC Service Continuity service to prevent, predict and manage IT disruption and incidents, and recover and continue even after a serious incident occurs. The Contractor shall ensure ongoing service continuity support, service continuity designs, training and testing, and ensure that service continuity reviews to support preventative planning and exercises for the handling of disasters and emergencies. The Contractor shall perform the following service continuity activities:
32. *Service Continuity Support -* Define operations roles and responsibilities and plan coverage to ensure all staff availability when service disruption occurs.
33. *Design Services for Continuity -* Design appropriate and cost-justifiable continuity mechanisms and procedures to meet the agreed business continuity targets. This includes the design of risk reduction measures and recovery plans.
34. *Service Continuity Training and Testing* - Establish preventive measures and recovery mechanisms for the case of disaster events and ensure they are subject to regular testing.
35. *Aggregation Platform* – The Contractor shall provide Aggregated Platform service to establish and maintain an Aggregated Platform that aggregates Infrastructure and Platform as a Service (IaaS/PaaS) services across multiple service providers providing physical processing, storage, networking, middleware platforms, and provisioning tools. The Platform shall provide resources for VA consumers through the support of automation and DevOps.

**Deliverables**

1. VA Cloud Technical Operating Model Updates
2. Decision Management Framework
3. Cloud Computing Program Management Plan

### Initiative 3: Enterprise Cloud Application Migration

The Contractor shall migrate VA applications and services in a systematic manner to take advantage of cloud computing benefits while applying risk averse principles to avoid distributions to ongoing operations. The Contractor shall thoroughly assess existing VA enterprise applications and services to determine their suitability and readiness to be migrated. The Contractor shall develop a general migration technical approach and roadmap, which specific applications or systems migrations will use as a template.

The Contractor shall develop a migration technical approach at the strategic level, considering any applications integration, security, and privacy, as well as any dependencies or exposure to proprietary vendor technologies. The Contractor shall develop systematic criteria to prioritize candidate applications and systems migrating to the cloud. The Contractor shall execute, manage, track, and validate the migration. The Contractor shall also develop and implement steps to decommission legacy applications or systems.

The Contractor shall perform the following tasks:

1. Assist VA in implementing automated and repeatable processes to accomplish applications/systems migrations.
2. Develop an overall Migration Technical Approach and roadmap which should include a strategic overview, conceptual plans, generic migration processes, risks and issues management, and notional migration milestones.
3. Develop VA-specific options for applications cloud migration methods, data migration methods, systems cutover and migration contingency planning.
4. Include selection criteria for defining the cloud target environment within VAEC, appropriate cloud migration method(s) (e.g. lift & shift, across the network, re-build, re-architect), network impact analysis, data migration approach, and specific cutover and contingency planning approach.

**Deliverables**

1. Migration Technical Approach

### [Initiative 4: Infrastructure Engineering Support](#_Toc487203623)

The Contractor shall provide application, data center consolidation, and unified communication support required to complete end-to-end management and execution of improvements to VA’s IT infrastructure.

#### Provide Unified Communications Support

VA has limited unified communications (UC) and collaboration infrastructure, coupled with standalone (stovepipe) implementations of video conferencing, audio conferencing, and messaging. The Contractor shall conduct specialized assessments, analysis, design, and support migration to a cloud-based service. The recommended solutions shall modernize communications to focus more on Veterans with scalability to extend services such as mobility to consolidate systems, eliminate duplication, standardize the systems, resulting in consistency in baseline configurations, training, and support contracts, which drive down recurring costs to more sustainable levels.

The Contractor shall perform the following tasks:

1. Analyze and recommend an enterprise UC architecture, design, and consolidation of VA contact centers.
2. Recommend UC Service Level Agreements (SLAs), Operational Level Agreements (OLAs), and best practice industry technical standards for all data center consolidation and UC application migration solutions.
3. Conduct an inventory of existing voice systems, circuit connectivity, and other peripherals for integration of legacy platforms to the extent possible of those communications platforms capabilities into the migration to single UC platform.
4. Develop, at a minimum, the technical migration phases, processes and steps, protocols and interfaces in migration, migration models, and site readiness assessments to achieve the transition of legacy VA voice and other communications systems to enterprise UC internet protocol (IP) solution.
5. Conduct UC infrastructure readiness assessments, to include UC infrastructure engineering support, for all data center consolidation and UC application migration solutions.

**Deliverables**

1. UC Architecture
2. UC Design
3. Contact Center Consolidation Recommendations
4. Communications Inventory
5. Unified Infrastructure Readiness Assessment

#### Provide Data Center Consolidation and Migration Assessment and Planning

VA’s IT hosting infrastructure is currently spread across 360+ VA data centers spanning all 5 VA districts of the United States. VA has a Data Center Consolidation Strategy to reduce our data center footprint, which includes consolidating I.T. services and applications to a cloud environment, or to a Core VA data center.

The Contractor shall provide program and project management, as well as analysis and operational support that include:

1. Performing current state discovery and inventory of systems hosted at specified data centers.
2. Analyzing portfolio disposition for the specified data centers.
3. Analyzing and recommending a target architecture for each system or application at the specified data centers.
4. Recommending a roadmap to execute consolidation.
5. Managing and supporting the execution of consolidation plans.

At VA’s request, the Contractor shall perform the following tasks for each specified data center consolidation/migration:

1. Assess current data center footprint of VA services, systems, and applications, and users for each location assigned by VA Program Manager. The Contractor shall develop and maintain a detailed inventory of services, systems, applications, and users for the data center. This inventory shall be incorporated into a VA Data Center Inventory of all data centers. The Contractor shall provide summary and detail VA Data Center Inventory Reports for all/individual data center.
2. Recommend a portfolio disposition, consisting of hosted services, systems, and applications, for individual, assigned data centers.
3. Analyze and recommend a target architecture that describes each system or application for the specified data centers. The Contractor shall develop and maintain the target architecture diagrams for the specified data center. The Contractor shall provide input for the development and maintenance of VA Cloud Target Architecture and ensure that the data center architectures alignment.
4. Define and maintain the Data Center Consolidation Vision and provide final state details on how each data center/facility will look like after the consolidation. This shall include both narrative and visualization.
5. Maintain and support the execution of the Data Center Consolidation Strategy that defines the approach for reducing data center footprint by migrating and merging services and applications to cloud.
6. This roadmap shall provide a phased approach to executing the Data Center Consolidation Strategy to achieve the Data Center Consolidation vision and objectives.
7. Develop and maintain VA Data Center Licenses List for all VA Data Centers.
8. Provide detailed monthly usage and billing reports indicating which services utilization, who is using them, and to which extent. The Contractor shall provide reports to support preparation of the budgets and forecasts for Data Center assets and services.

**Deliverable**

1. VA Data Center Inventory, individual data center inputs incorporated into master inventory
2. Data Center Portfolio Disposition, for each assigned data center
3. VA Data Center Consolidation Strategy and Roadmap
4. VA Data Center Licenses List

## TIME AND MATERIALS (T&M) TASKS AND DELIVERABLES

### Initiative 2: Enterprise Cloud Architecture, Design, and Operations

The Contractor shall provide operational support for while transitioning to, from, or within VAEC, using VAECOT, where possible. The Contractor shall perform the following tasks:

1. *Technical Support* - The Contractor shall provide Technical Support service. The Contractor shall design, test, operate, and improve of all aspects of technical management of VA cloud computing infrastructure. The Contractor shall conduct an application migration assessment (but not application specific technical support) and infrastructure modernization support to ensure successful deployment of cloud services, applications, and infrastructure. The Contractor shall provide contextual information to VA National Services desk such as service desk scripts, and knowledge base articles. VA National Service Desk shall be the initial intake of user requests and incidents.
2. *Automation Support* - The Contractor shall provide Automation Support service. The Contractor shall review, define, plan, develop, implement, maintain, and report on all cloud automations delivering infrastructure and applications across multiple hypervisors in all delivery models.
3. *Middleware Support* - The Contractor shall provide Middleware Support service (i.e. ESB, API, etc.) to ensure the selected middleware enables the effective transfer of data between applications or data sources; monitoring and control mechanism (e.g., incident detection and resolution) are in place to support optimal middleware operations. The Contractor shall define and maintain information about how applications are linked through middleware.
4. *Database Support* - The Contractor shall provide VAEC Database Support service to ensure the optimal performance, security and functionality of databases that they manage. The Contractor shall perform the following activities:
5. Creation and maintenance of database standards and policies
6. Database design, creation, and testing
7. Management and maintenance to ensure availability, performance, and resilience
8. Setting up alert about potential performance or integrity issues with the database
9. Performing database maintenance that ensures the databases are functioning optimally and securely (e.g., tuning indexing)
10. Identification, monitoring, reporting and management of database usage (e.g., transaction volumes, response times, concurrency levels)
11. Generating database reports (e.g., performance and integrity of the database)
12. *Application Support (Only for Core Services) –* The Contractor shall provide Cloud Application Support (Only for Core Services) service that includes the planning, designing, development, build, test, migration, deployment, operating, reporting, and optimizing of all cloud application capabilities and controls including application design, integration, automation, administration, deployment, lifecycle support, and security configuration and administration.

### Initiative 3: Enterprise Cloud Application Migration

The migration of VA applications and services to take advantage of cloud computing benefits must be done in a systematic manner. Existing VA enterprise applications and services must be thoroughly assessed to determine their suitability and readiness to be migrated. A migration technical approach and plan must be developed, both generally at the strategic level and for each system to be migrated, considering any applications integration, security, and privacy considerations. Finally, the migration must be executed, managed, tracked, and validated. Potential applications or systems decommissioning must be addressed as well.

#### Systems and Applications Assessments

The Contractor shall conduct systems and applications assessments that consider significant criteria including costs of migration, the potential need for application redesign or refactoring, application performance and availability, network impact, security and privacy requirements, and other VA and federal regulatory requirements.

The Contractor shall perform the following tasks for assigned systems and applications:

1. Produce new, and/or validate existing analysis and recommendations of VA-identified systems and applications to determine their suitability for deployment to the cloud. The Contractor shall provide recommendations for cloud migration based on applications’ development lifecycle, business relevance, security impacts, organizational roles, capacity planning, financial aspects of cloud service delivery, and other migration considerations.
2. Assess systems and applications to advise VA on the optimal strategy to migrate these systems to, from, and within VAEC.
3. Perform a network impact analysis for each application-specific migration that addresses requirements for network connectivity, bandwidth, and latency, as a component to the Systems and Applications Assessments. This analysis shall recommend network Service Level Agreements (SLAs) and Operational Level Agreements (OLAs) for end-to-end-to-end connectivity, to include, routers, gateways, switches, firewalls, load balancers, to ensure network performance between users, applications and their cloud services.
4. Conduct a comprehensive inventory of VA IT assets to be migrated, along with resident applications, infrastructure, and their security requirements.
5. Advise VA on the system or data’s Cloud suitability, and provide Rough Order of Magnitude (ROM) cost estimates for Cloud migrations/implementations, and operations.
6. Support OI&T Intake Process to analyze new requests, and advise and recommend the optimal approach to implement the new systems and data in VAEC.
7. Assist VA in establish a Migration VAEC intake process to support management governance to monitor and control all stages of the transition and to integrate within existing processes/procedures, as required.
8. Document system and application interdependencies that result in VAs understanding of the benefits and implications of moving individual applications or groups of applications to the cloud. Identify and document critical dependencies between applications and data.
9. Provide decomposition of identified systems and applications to identify common functions and services (e.g., micro services, APIs) that can potentially be migrated to the cloud, and identification of potential shared services.

**Deliverables**

1. Cloud Suitability Assessment Plan

#### Develop Specific Migration Plan

At VA’s request, the Contractor shall perform an in-depth analysis of an application or system and develop detailed migration plans. The Contractor shall perform the following tasks:

1. Develop a Detailed Cloud Migration Plan for each application or system to be migrated, which should include selection of the target environment, migration method(s) (e.g. lift & shift, across the network, re-build, re-architect), resource plans from both VA and recipient side, timeline, dependencies, risks and issues, estimated costs, test strategies. This plan shall be in accordance with the overall Migration Technical Approach template.
2. Recommend network changes to satisfy requirements identified in the network impact analysis.
3. Review, analyze, and elaborate the business process and requirements for cloud projects and assess them against the technical requirements are satisfied, and their alignment with VA requirements management standards and guidelines. The Contractor shall make recommendations to inform business requirements development. The Contractor shall support the development and update of use cases and process flows.
4. Support development and elaboration of technical requirements for cloud projects and ensure requirements are clearly defined, documented, and communicated.
5. Produce thorough analysis resulting in a comprehensive report on VA IT users and stakeholders that would be impacted by cloud migration. For example, stakeholder groups could include Executive Sponsor, Legal and Contracts Management, VA Business Units, Application, Infrastructure, and Data, Security (VA Office of Information Security (OIS) and End User stakeholders. The analysis shall include, but is not limited to, cloud migration recommendations tied to the purpose of the applications or services being migrated. Recommendations should include information obtained from users, stakeholders, operations, and related input and output processes based on the role and business function of the affected VA systems. The Contractor shall allow for the optioning of this activity at VA’s discretion and provide standardized sizing estimates for different application types.
6. Conduct a comprehensive inventory of VA IT assets to be migrated, along with resident applications, infrastructure, and their security requirements.
7. Develop a detailed application analysis (including infrastructure and application dependencies). This should include architecture components, attributes and dependency maps and relationships by application and incorporate considerations for security such as data sensitivity, legal or other regulatory issues, disaster recovery, currently deployed remote access or internal security considerations, etc.;
8. Design an “End State” architecture and design to fit the application into VAEC by working with VA to perform a detailed design of the end-state, cloud-based application and integration architecture, incorporating government-wide and VA-specific security controls into the target design and migration plan.
9. Conduct project-planning workshops with VA and its application contractors to review the design and to validate the systems’ migration processes.
10. Develop and maintain Test Plan(s) and test scripts (automated where possible). The Contractor shall provide test data to support testing events.
11. Develop and maintain an Integrated Master Schedule (IMS) that defines the timeline, tasks, dependencies, and resources. The Contractor shall ensure this includes all tasks (VA and non-VA) that are required for migration.
12. Develop a detailed move package (as part of the Migration Plan) that includes a profile (e.g., system criticality, system priority, and peak usage periods) for the migrating application system, interdependencies between application systems, confirms low-impact migration window for the application, and confirms change freeze and mock migration windows.
13. Support the update of relevant standard operating procedures, run books, production procedures, system documentation, and standard practices, including any required update of the ATO package.
14. Define post-migration test activities, including data validation. accessible in the new target hosting environment including integration testing with all partners, application support contractors, and their locations as appropriate for each application system.
15. Identify cutover procedures, and contingency planning for fallback to legacy should the initial cutover be unsuccessful.

**Deliverables**

1. Migration Plan
2. Application Analysis
3. Test Plan(s) and Test Scripts
4. Integrated Master Schedule

#### Perform Migration

At VA’s request, the contractor shall prepare for and execute the migration to, from, or within VAEC, test and validate the migration, and perform application cut-over.

The Contractor shall perform the following tasks:

1. Migration Preparation
   1. Perform a test build-out of the target cloud environment, supporting infrastructure, software, tools, and network, perform testing and validation of transition/target environments and migration runbook(s), resource assignments, final migration planning & go/no-go decision.
   2. Conduct mock move simulations prior to executing the migration plan(s), including executing the move plan, scripts, and process execution to validate that the technical detailed migration plan/schedule is comprehensive and complete, in accordance with the approved Migration Plan.
   3. Maintain and update the migration script(s) as needed.
2. Transition and Execution
3. Perform the build-out of the target environment, supporting infrastructure, software, tools, and network required for the migration of applications and associated data.
4. Obtain all data (legacy and production) contained at VAs originating source locations (including any data that may be maintained in vendor owned systems (e.g., tickets)) and migrate it to the new target environment.
5. Migrate VA applications in multiple move packages in accordance with the approved Migration Plan. Each move package will be sequenced in accordance with application interdependencies and risk assessments, and includes the support systems, development and test systems, and infrastructure systems
6. Migrate all application system data in accordance with the data migration plan, including all archived application server logs from the originating source locations, begin capture of new logs in cloud environment and make accessible in the new target hosting environment.
7. Perform and manage migration testing, including integration testing with all partners, application support contractors, and their locations as appropriate for each move package.
8. Plan, receive approval, and communicate outages in advance, and provide end-user acceptance testing support, involving key vendor and support personnel until the move is completed successfully during the planned transition outages.
9. Conduct Operational Readiness Reviews (ORRs) to determine the organization’s readiness to operate the migrated solution. This shall consist of a review of standard operating procedures and secure environment for all systems migrating to the target environment including plans, schedules, procedures, scripts, testing/validation, and formal acceptance.
10. Conduct Production Readiness Reviews (PRRs) and obtain approval to go-live. The Contractor shall tailor the PRR Process in consultation with VA's Enterprise Quality Assurance Program staff to ensure that appropriate information is being reviewed prior to each go-live activity.
11. Execute the contingency plan for fallback to legacy should the initial cutover be unsuccessful.
12. Conduct a migration project review with all participating stakeholders within 10 business days after conclusion of the final Move Package “Go Live” to create a list of lessons learned that will be used during post transition.
13. Obtain VA’s sign-off indicating that the application migration has been successfully completed, and then close out the migration.
14. Post Migration
15. Provide post-migration hyper-care services, update application documentation, transfer knowledge and support responsibilities to operations, optimize service management, decommission application assets, and obtain application sign-offs.
16. Conduct post-migration reviews within 5 business days of the end of each migration package and mock migration, and incorporate findings into future plans.
17. Conduct a review with all participating stakeholders within 10 business days after conclusion of each migration to identify and document all open items during the migration, determine a resolution date and obtain VA concurrence for any items that will not be closed prior to completion of the transition. Create a list of lessons learned that will be used during the remainder of the migrations.
18. Seek VA acceptance upon conclusion of each move package authorizing VA to take over operational responsibility.
19. Transition all open migration incident, problem, and change tickets for each move package to VA ticket tracking system post migration.
20. Update disaster recovery and continuity of services plans at the end of each migration package, as per the ATO process for repackaging.
21. Reporting. Provide weekly migration status updates on progress, risks and issues to the Cloud Program Office.

**Deliverables**

1. Operational Readiness Review (ORR) Results
2. Production Readiness Review (PRR) Results
3. Post-Migration Test Results
4. Migration Progress Reports

#### Provide System and Application Decommissioning Services

At VA’s request, the Contractor shall facilitate decommissioning of any legacy system or application. The Contractor shall perform the following tasks:

1. Provide the current state architectural details with diagrams where possible, of the target applications, solutions, and/or services to be decommissioned, shut down, and their related resources released.
2. List all formerly connected services and applications documenting all interfaces and dependent systems. Included elements consist of:
   1. Hardware: Servers, including virtual machines, load balancers as appropriate, etc.
   2. Software: Notate operating systems, essential platform and middleware components, software packages, etc.
   3. Interfaces: Notate all prior interfaces to the target applications and services that will be moved to the cloud so they can be tested for inactivity. 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.
   4. Security Categorization: Provide current system impact levels (low, moderate, high) for confidentiality, integrity, and availability as defined in FIPS 199.
   5. Configuration Management: Provide appropriate details on Department/Agency configuration management systems and policies.
   6. Service and support contracts that exist for software, services, and solutions that are to be decommissioned. Notate contacts within the Department/Agency that can be support the needed changes or cancellations.
3. *IT Equipment Disposal* - The Contractor shall provide details on the relevant hardware equipment that has reached its end-of-life or is otherwise ready to be repurposed. Detail whether the equipment has been through any process to determine suitability for reuse internally within VA or has been declared excess. Additional elements include:
   1. Maintenance and Support Contracts - Identify hardware maintenance and service contracts related to the equipment that can be cancelled or amended.
   2. Asset Tracking - Identify systems will need to be reference and updated.
   3. Approvals: Coordinate with VA staff on VA-specific approvals required to dispose of equipment.
   4. Data Sensitivity - Provide system impact levels for the types of data utilized by the services and applications previously hosted on the hardware for the determination of data and equipment handling and sanitization standards.
4. *Facility Disposition* - The Contractor shall provide a description of the facility/space to be closed, to include specifics such as the location, size, and physical plant details for the data center itself and the encompassing structure to fully describe the context of the facility. Include whether the spaces are leased or owned, the final disposition state, and the “turn-in” condition required. Additional example details include:
5. *Physical plant equipment* - The Contractor shall itemize physical plant details specific to the data center portions such as generators, HVAC, UPS, power conditioners, fire suppression and security systems, etc. that will need disposition.
6. *Utilities* - The Contractor shall list telecom, data circuits, electric, gas, and water as applicable that will need to be cancelled or modified.
7. *Service and Maintenance Contracts* - The Contractor shall identify contracts covering overall data center operations as well as individual physical plant elements like generators and primary or supplemental HVAC, etc. Also, tangential services such as janitorial or waste pickup.

**Deliverables**

1. Decommissioning Plan

### [Initiative 4: Infrastructure Engineering Support](#_Toc487203623)

The Contractor shall provide planning, technical management and execution support for specific data center consolidation and Office 365 migration projects/efforts to continuously improve VA’s cloud computing capabilities.

The Contractor shall provide subject matter expertise to support development and execution of application migration and/or implementation plans. The Contractor shall support:

* Maintaining a highly available, scalable, and redundant data center infrastructure that will substantially reduce the Government’s risk and provide for fiscally-responsible future IT growth.
* Increasing the IT security posture of VA enterprise IT systems through implementation of standardized processes and monitoring tools.
* Recommending automated and standardized monitoring of IT systems for availability and performance to improve service levels across the agency.
* Recommending automated and standardized security hardening of hardware and software platforms in accordance with federal and VA policies and guidelines to ensure the integrity and confidentiality of protected Veterans privacy and health records as required.

#### Provide Data Center Consolidation and Migration Execution Support

Data Center Consolidation Projects shall be planned, managed, and executed to achieve the Data Consolidation vision and strategic objectives. The Contractor shall ensure continuous IT system availability and performance through implementation of redundancy, load balancing, and disaster recovery measures.

The Contractor shall provide data center migration services required to complete end-to-end management and execution of any necessary moves to continue the provision of IT services to all end-users with a minimum of operational risk and downtime. The Contractor shall provide subject matter expert (SME) infrastructure engineering services, at VA’s request, related to the physical migration of VA IT systems, applications, hardware, and supporting facilities physical infrastructure (“workloads”) including but not limited to:

1. Develop and maintain a Data Center Consolidation Project Plan that details the planned approach, process/activities, timeline, dependencies, risks/issues, resources and tools used to support a data center consolidation project. This plan shall describe the final state of the data centers. The Contractor shall ensure alignment and integration with the Data Center Transition Strategy and Roadmap.
   1. Develop and support the execution of Individual Site Consolidation Plan, as part of the Data Center Consolidation Project Plan, for each data center consolidation. The Contractor shall ensure that the Individual Site Consolidation Plans integrate with the overall Data Center Consolidation Project Plan.
   2. Conduct a risk assessment (e.g., security, capacity, workload, scalability, portability) of planned migrations and support mitigation of the risks. The Contractor shall assist in completing actions required to mitigate risks. The Contractor shall enter and maintain risks in the centralized, Risks and Issues Log identified by VA Program Manager.
   3. Develop and maintain a Systems and Applications Mapping that depicts and links all components and interdependencies of business processes and systems/applications, including software, servers, storage, security, networking infrastructure and data flow.
   4. Analyze and document dependencies between systems, applications, infrastructure, organizations that may impact planning for physical migrations. The Contractor shall develop dependency mappings that describe and depict dependencies.
   5. Document existing physical layout, power requirement, and network cabling plans as necessary to reinstall physically migrated equipment at the target location.
   6. Analyze and determine funding requirements for migration. The Contractor shall assist in the process for obtaining migration funding.
   7. Conduct capacity planning and determine work for target environment.
   8. Develop and maintain an integrated master schedule (IMS) that defines the tasks, dependencies, dates, and resources. The Contractor shall develop and maintain project schedules for each individual site and ensure inputs are incorporated into the IMS.
   9. Coordinate with and subcontract to, as necessary, OEM service providers to ensure continuity of warranty and service contract coverage for equipment being relocated.
   10. Coordinate with external IT service providers required by contract to be involved with physical equipment moves to maintain maintenance service contracts and warranties.
2. Establish and prepare operating environments and infrastructure (e.g., services, systems, applications, hardware, and facilities) required to support migrations.
   1. Support development of technical requirements for migration.
   2. Establish beachhead environments at migration target locations to ensure correct operation of equipment once physically relocated.
   3. Support acquisition planning and the development of acquisition documents required to obtain services to implement beach head environments.
   4. Receive, install, and test beachhead equipment necessary to establish an operational service environment at the migration target locations, as necessary. Equipment may include but is not necessarily limited to power distribution and conditioning systems, air conditioning systems, IT equipment racks and cabinets, WAN equipment, LAN switching equipment, server equipment, storage equipment, conveyances, and structured cabling.
   5. In accordance with NIST SP 800-37 and VA Directive 6500, support the completion of the Assessment and Authorization (A&A) process, which results in the official management decision given by a senior agency official to authorize operation of a VA information system. The Contractor shall develop and update A&A documentation to acquire authority to operate migrated IT systems, applications, hardware, and supporting facilities physical infrastructure. The Contractor shall also identify gaps in documentation and processes, and assist in developing and executing action plans to resolve the gaps.
   6. Support the completion of the Section 508 Process and ensure requirements are satisfied. The Contractor shall identify gaps and assist in developing and executing action plans to resolving the gaps. The Contractor shall develop and update Section 508 documentation.
3. Coordinate with VA and external stakeholders to provide Data Center migration execution support.
4. Prepare data stores, for migration to the infrastructure services.
5. Perform data center migration in/out, including physical environment buildout and physical equipment migrations, and necessary associated support.
6. Migrate physical hardware from one operating environment to another.
7. Support testing of capabilities following migration.
8. Support in using operational features such as machine image snapshotting and image libraries.
9. Support physical moves for migrations.
   * 1. Provide end-to-end insurance covering the replacement value of any IT equipment (for each migration activity).
     2. Provide secure, white-glove moving services that protect VA investment through appropriate security of equipment and data, continuous tracking and continuous physical accompaniment, and physical equipment security, packaging, and tamper-proofing, within approved migration plan timing and operational parameters. Alternatively, (at VA discretion), use existing VA relocation service vehicles (e.g., ROSE) to provide secure, white-glove moving services.
     3. Coordinate with target sites to conduct site preparation to protect Government resources and enable efficient physical moves.
     4. Provide all necessary equipment, packaging materials, and tools to accomplish the relocation.
     5. Document all individual hard drive, blade server, and similar operating locations within their respective chasses; label all equipment as necessary to ensure correct reassembly and reinstallation.
     6. Prepare, handle, transport and relocate sensitive equipment in compliance with VA security and privacy policies and guidelines.
        1. Document and label sensitive equipment slated for relocation; unrack rack-mounted IT equipment.
        2. Package sensitive equipment for shipping. The Contractor shall seal individual shipping packages that may contain PII/PHI. The Contractor shall apply tamper-proofing and shipping damage indicators.
        3. Load sensitive equipment into transportation. Secure all sensitive equipment to mitigate the potential for possible physical damage.
        4. Transport sensitive equipment from start location to finish location. Equipment shipments should be continuously protected and tracked to enhance security of equipment and data.
        5. Unload sensitive equipment from transportation to Government facility staging location (as coordinated), and unpackage for reinstallation. Validate that no physical damage has occurred to sensitive equipment during relocation activities. The Contractor shall report any physical damage to VA Project Manager and identify corrective action.
        6. Relocate sensitive equipment to coordinated location within finishing Government facility. Re-rack rack-mounted IT equipment per coordinated plans and/or starting site documentation. The Contractor shall comply with VA guidelines for handling sensitive equipment and data.
     7. Perform detail cleaning of finishing site to ensure conditions remain the same prior to the relocation.
     8. Walkthrough with receiving site Government point of contact (POC) for final order acceptance.
     9. Personal property (e.g. systems furniture, desks, chairs, storage cabinets, storage bins, unrelated parts, tools, books, paper records, and similar) are not in the scope of this contract. Relocation of these types of personal property shall not be accomplished by the vendor under this contract and are the sole responsibility of the Government. The Contractor shall bring to the attention of the Contracting Officer’s Representative (COR) any personal property items that need to be relocated that are not in the scope of these services.
10. Analyze current business needs and technical environment and identify requirements for decommissioning services and application. The Contractor shall plan and manage decommissioning services and applications with a transition plan.
11. Develop and support the execution of a Decommissioning Plan for decommissioning services and applications that defines data center decommissioning activities, timeline, milestones, resources, estimated effort, cost and risks’
12. Analyze and document dependencies and ensure no dependencies on systems remain active.
13. Identify requirements for service cessation resulting in a final release of related resources.
14. Identify requirements for termination of support contracts for targeted services and applications.
15. Analyze current operating environment and identify disposition requirements.
16. The Contractor shall plan and manage disposition of data center assets.
17. Develop and support the execution of a Disposition Plan for the disposition of IT hardware including servers, networking equipment, power supplies, racks, and cabling. Relocate equipment within VA enterprise for re-use as determined effective, efficient, and necessary.
18. Identify requirements for termination and modification of related software licenses and maintenance contracts.
19. The Contractor shall plan and manage disposition of facilities.
20. Develop and support the execution of a Disposition Plan for the disposition of facility hardware and physical facilities physical infrastructure support equipment such as generators, UPS, HVAC, power conditioners, fire suppression, and security systems. Relocate equipment within VA enterprise for re-use as determined effective, efficient, and necessary.
21. Identify requirements for the termination of utilities, data circuits, service contracts, and operation and/or maintenance contracts for both the facility and the facility hardware.
22. Identify requirements for terminating data center leases. Recommend requirements for the restoration of facility to “turn-in” condition. The Contractor shall develop support the execution of a Termination Plan.
23. Support architecture, design, and planning for the migration of specific applications and architectural components.
24. Support development and update of inventories (e.g., cloud, IT asset).
25. Support development and update of cloud strategies and roadmaps.
26. Support elaboration and development of technical requirements.
27. Support review and update of the architecture and design of VA’s cloud computing solutions. The Contractor shall provide recommendations to inform review dispositions.
28. Support application migration process including assessing candidates for cloud migration, completing risk assessments, selecting hosting options, determining funding requirements, and developing and maintaining migration strategies, plans, roadmaps, and integrated master schedules.
29. Analyze and document licenses required, data migration technical and connectivity requirements, baseline performance, target environment, test plan, end-to-end test results, and test application connectivity, storage requirements and provision, and data migration approach proposal.
30. Support cloud suitability analysis, identifying appropriate service models and options for the migration activities including target environment.
    1. Virtualization of legacy systems to use infrastructure services.
    2. Virtualization of legacy systems to use infrastructure services, including but not limited to, Physical to Virtual (P2V) workload conversion, where applicable, and Virtual to Virtual (V2V) workload conversion, where applicable.
31. Provide cloud interconnect solution recommendations from VA to the CSP.
32. Support development of business cases to quantify cost and benefits of the proposed/recommended courses of action, and of courses of action determined necessary by the Government. Support the design/creation of the environment for testing applications or services, as necessary.

**Deliverables**

1. Data Center Consolidation Project Plan
2. Individual Site Consolidation Plan
3. Data Center Decommissioning Plan
4. Data Center Disposition Plan
5. Data Center Termination Plan

#### Modernize and Enhance End-User Services and Data Storage

The Contractor shall provide analysis, architecture, design, planning and execution support for the modernization and enhancement of end-user services and data storage (e.g., Fileshare, Email, SharePoint).

The Contractor shall work with VA Migration Project Manager to provide project management support to plan, coordinate, manage, and execute migrations.

##### Analyze, Architect, Design, and Plan Migration

The Contractor shall analyze the current IT infrastructure, services, applications, and data storage to recommend strategies to modernize and enhance. The Contractor shall:

1. Conduct an analysis of alternatives that explore strategies for continuously improving end-user services and data storage. The Contractor shall perform cost benefit analysis and risk assessment of alternatives. This includes, but is not limited to:
2. Implementing on premise and off premise cloud solutions
3. Consolidating and centralizing resources
4. Improving workload efficiency
5. Repair and rehydrate services
6. Selecting cost-effective migration solutions

The Contractor shall review with the VA COR and Program Manager/Project Manager, and obtain VA approval for the recommended strategy.

1. Recommend prioritized, applications that are well-suited for accelerated deployment to the cloud, and provide recommendations for executing this migration, as optionally needed.
2. Perform systems and application assessments to support approved strategy, as defined in *PWS section 5.2.2.1, Systems and Applications Assessments*.
3. Provide migration planning support, as defined in *PWS section 5.2.2.2, 5.2.2.2Develop Specific Migration Plan*.

For each approved modernization/enhancement strategy, the Contractor shall perform the following tasks:

1. Develop, execute, and maintain a Transition Plan that includes, but is not limited to:
2. To-be operating environment that includes the IT infrastructure, services, applications, systems, and data stores.
3. Concept of operations and roles and responsibilities.
4. Standard operating procedures (e.g., onboarding/offboarding, configuration, help desk support) that aligns with Cloud Technical Operating Model.
5. Service desk scripts, knowledge base articles, user management plans.
6. Risk/Issue Log updates

The Contractor shall ensure alignment with the Migration Plan.

1. Develop and maintain training plan that describes approach for training admins and end-users. The Contractor shall ensure that their staff and subcontractors have completed all required training, and shall be available and ready to run and support the migrated systems. This includes but is not limited to:
2. Provide notification and communication of transition, and user adoption material to end-users on VA’s transition
3. Develop and conduct training for admins on migration process
4. Develop and conduct training for admins and users on supporting sites
5. Develop fact sheet that describes transition
6. Identify hardware, software, and tools needs to support planned migrations.
7. Create, review, analyze, and distribute relevant, migration information to stakeholder groups.
8. Report on migration progress, upcoming milestones, key activities, progress, changes, risks and issues. The Contractor shall provide a weekly and monthly status reports for each migration, as agreed upon with VA Migration Project Manager.
9. Update policies and procedures such as service creation/deletion, helpdesk escalation (Tier 1, 2, 3, 4).

**Deliverables**

1. Analysis of Alternatives
2. Transition Plan
3. Training Plan

##### Support Migration Execution

The Contractor shall migrate end-user services and data storages to the target environment.

At VA’s request, the Contractor shall provide migration execution support as defined in *PWS Section 5.2.2.3, Perform Migration*. The Contractor shall also perform the following tasks:

1. Execute the Migration Plan, Runbook, and Test Plan.
2. Develop and/or migrate workflows (e.g., Nintex for SharePoint migrations).
3. Plan, receive approval, and communicate outages in advance.
4. Support independent audits of all sending and receiving sites.
5. Develop and execute a customer support plan for gathering feedback, and monitoring and reporting on customer satisfaction.
6. Perform knowledge transfer to operating organization.
7. Create utilization, usage and data aging reports.

VA currently has the following target migrations identified. This may change based on the migration planning activities provided by the Contractor.

* **Microsoft SharePoint 2007, 2010, 2013, 2016** - Migration to O365 SharePoint Online or single on Premise SharePoint Farm (PWS Section 5.2.3.2.2.1)
* **VA File Share Files** - Migration of compatible files to One Drive for Business (PWS Section 5.2.3.2.2.2)
* **Personal Storage Table (PST) Files** - Locate, Repair and Rehydration into O365/Exchange Online and deletion of On Premise copy with removal of PST links in users MS Outlook Client (PWS Section 5.2.3.2.2.3)
* **EAS/Zovy Archive** - Rehydration of EAS/Zovy Archive into users O365/Exchange Online mailbox (PWS Section 5.2.3.2.2.4)
* **Lync 2013 Server Backend** - Migration of backend Lync 2013 Services to Skype for Business (client already deployed by VA) and continue dial in capability using O365 PTSN (PWS Section 5.2.3.2.2.5)

If the migrations above are recommended, the Contractor shall analyze, architect, design, plan, and execute migrations as defined in PWS section X and X. The Contractor shall also provide the below support specific to these migrations.

###### Perform O365 Migration to SharePoint Online or On Premise SharePoint Farm

VA seeks to migrate as much of SharePoint content as is reasonable and possible to O365 SharePoint Online, and consolidate to select centralized, on premise SharePoint farms to be provided by VA. The Contractor shall migrate services from on premises to SharePoint online, and from on premises to consolidated, on premise SharePoint farm for remaining sites that are unable to move to SharePoint Online. The Contractor shall develop a strategy for implementing and migrating SharePoint capabilities. The strategy shall include both simple (“Silver”) and complex (“Gold”) sites.

Table 1 VA SharePoint Site Quantity below, provides a sample of the of the number of current sites targeted. The Contractor shall review potential sites and recommend a strategy that includes, but is not limited to these sites.

Table 1 VA SharePoint Site Quantity

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Area | Total Sites | Silver Migration | Silver Sub-Site Migration | Gold Migration | GOLD Sub-Site Totals | Total to Migrate | Total Sites to Migrate | Total Subsites Per Top Level Sites | Total My Sites Removed | Total Empty Sites | Test Sites Not to be migrated |
| TOTALS | **68237** | **916** | **1360** | **2542** | **83770** | **3474** | **3534** | **85130** | **64703** | **7** | **53** |
| Region 1 | 28832 | 239 | 317 | 542 | 12513 | 781 | 787 | 12830 | 28045 | 1 | 5 |
| Region 2 | 3853 | 4 | 5 | 77 | 12080 | 81 | 81 | 12085 | 3772 | 0 | 0 |
| Region 3 | 13272 | 78 | 138 | 297 | 14082 | 375 | 378 | 14220 | 12894 | 1 | 2 |
| Region 4 | 2788 | 220 | 295 | 558 | 11951 | 778 | 789 | 12246 | 1999 | 0 | 11 |
| VACO | 6960 | 0 | 0 | 100 | Data not provided | 100 | 103 | No Data | 6857 | 0 | 3 |
| ESE | 10349 | 64 | 94 | 322 | 19364 | 386 | 402 | 19458 | 9947 | 0 | 16 |
| Web Ops | 1135 | 180 | 283 | 460 | 10359 | 640 | 656 | 10642 | 479 | 5 | 11 |
|  |  |  |  |  |  |  |  |  |  |  |  |
| CDW | 186 | 81 | 83 | 105 | 714 | 186 | 186 | 797 | 0 | 0 | 0 |
| AITC | 27 | 5 | 5 | 21 | 376 | 26 | 27 | 381 | 2 | 0 | 1 |
| QITC | 7 | 1 | 1 | 6 | 178 | 7 | 7 | 179 | 0 | 0 | 0 |
| ITLO |  |  |  | 0 | 0 | 0 |  |  |  |  |  |
| OIG |  |  |  | 0 | 0 | 0 |  |  |  |  |  |
| HRC | 19 | 3 | 3 | 14 | 243 | 17 | 19 | 246 | 0 | 0 | 2 |
| NSO | 22 | 6 | 6 | 16 | 81 | 22 | 22 | 87 | 0 | 0 | 0 |
| CMOP 2010 | 15 | 3 | 3 | 11 | 1220 | 14 | 15 | 1223 | 0 | 0 | 1 |
| CMOP 2013 | 30 | 28 | 33 | 2 | 20 | 30 | 30 | 53 | 0 | 0 | 0 |
| OGC | 710 | 0 | 0 | 2 | 202 | 2 | 2 | 202 | 708 | 0 | 0 |
| NSAT | 7 | 1 | 34 | 6 | 145 | 7 | 7 | 179 | 0 | 0 | 0 |
| OI&T |  |  |  | 0 | 0 | 0 |  |  |  |  |  |
| BISL | 25 | 3 | 60 | 3 | 242 | 22 | 23 | 302 | 0 | 0 | 1 |

At VA’s request, the Contractor shall architect, design, plan, project management, and execution support to migrate users to SharePoint Online or On Premise SharePoint Farm, as defined this PWS section 5.0.

The Contractor shall also perform the following specific tasks:

1. Architect, design, and configure VA O365 SharePoint environment. This includes: meta data, enterprise search, governance, site creation/deletion, archiving data, security, support processes, and monitoring.
2. Support the execute migration and transition plans.
3. Migrate remaining on premises sites that can't move to O365 to a single on premises VA SharePoint 2013 farm in Enterprise Operations.
4. Build out of SharePoint 2013 farm and storage in Azure as a temporary migration system to O365 for SharePoint 2010 farm data.
5. Provide migration tool to migrate workflows to O365.

###### Perform O365 Migration to One Drive for Business

VA seeks utilization of OneDrive for Business to every extent possible. VA intends to enable OneDrive for users initially while data migration of existing user data is migrated from user file share and shared folders to OneDrive for Business or SharePoint online.

Table 2 VA File Share Environment below, provides estimates for Home Directory to OneDrive labor across approximately 488K workstations and users across VA. The table represents the bulk of the user information stored in various VA Fileshare devices across six regions.

Table 2 VA File Share Environment

| Totals |  | Terabyte(s) | Bytes % | Files |
| --- | --- | --- | --- | --- |
| **Totals** | 991.01 | 100% | 1,096,962,623 |
| **PST** | 331.41 | 33% | 1,368,135 |
| **Total of non-PST data not supported by OneDrive** | 50.76 | 5% | 65,559,426 |
| **Home Directory Paths (region 5 data could not be divided between home and shared so we used a 40/60 split respectively)** | 260.48 | 26% | 505,480,712 |
| **Shared Paths (region 5 data could not be divided between home and shared so we used a 40/60 split respectively)** | 348.36 | 35% | 524,554,350 |
| Region 1 |  | **Terabyte(s)** | **Bytes %** | **Files** |
| **Total Data:** | 206.47 | 100% | 212,387,181 |
| **Total PST:** | 87.97 | 43% | 793,532 |
| **Total of other files not supported by OneDrive:** | 6.86 | 3% | 8,827,262 |
|  |  |  |  |
| **Total that are candidates for migration to OneDrive:** |  |  |  |
| **Home Directories** | 47.40 | 23% | 111,338,851 |
| **Shared Directories** | 64.23 | 31% | 91,427,536 |
| Region 2 |  | **Terabyte(s)** | **Bytes %** | **Files** |
| **Total Data:** | 209.95 | 100% | 186,953,977 |
| **Total PST:** | 85.39 | 41% | 201,518 |
| **Total of other files not supported by OneDrive:** | 8.59 | 4% | 9,692,542 |
|  |  |  |  |
| **Total that are candidates for migration to OneDrive:** |  |  |  |
| **Home Directories** | 38.80 | 18% | 80,312,082 |
| **Shared Directories** | 77.17 | 37% | 96,747,835 |
| Region 3 |  | **Terabyte(s)** | **Bytes %** | **Files** |
| **Total Data** | 263.11 | 100% | 228,477,111 |
| **Total PST** | 57.46 | 22% | 171,300 |
| **Total of other files not supported by OneDrive** | 9.17 | 3% | 12,613,244 |
|  |  |  |  |
| **Total that are candidates for migration to OneDrive:** |  |  |  |
| **Home Directories** | 66.88 | 25% | 106,418,315 |
| **Shared Directories** | 129.59 | 49% | 109,274,252 |
| Region 4 |  | **Terabyte(s)** | **Bytes %** | **Files** |
| **Total Data:** | 118.08 | 100% | 199,437,280 |
| **Total PST:** | 42.22 | 36% | 120,240 |
| **Total of other files not supported by OneDrive:** | 19.35 | 16% | 15,649,260 |
|  |  |  |  |
| **Total that are candidates for migration to OneDrive:** |  |  |  |
| **Home Directories** | 54.96 | 47% | 105,258,263 |
| **Shared Directories** | 1.55 | 1% | 78,409,517 |
| Region 5 |  | **Terabyte(s)** | **Bytes %** | **Files** |
| **Total Data:** | 162.02 | 100% | 234,546,865 |
| **Total PST:** | 46.35 | 29% | 68,798 |
| **Total of other files not supported by OneDrive:** | 5.38 | 3% | 16,563,640 |
|  |  |  |  |
| **Total that are candidates for migration to OneDrive:** |  |  |  |
| **Home Directories** | 110.29 | 68% | 217,914,427 |
| **Shared Directories** | 0.00 |  |  |
| Region 6 |  | **Terabyte(s)** | **Bytes %** | **Files** |
| **Total Data:** | 31.38 | 100% | 35,160,209 |
| **Total PST:** | 12.02 | 38% | 12,747 |
| **Total of other files not supported by OneDrive:** | 1.41 | 4% | 2,213,478 |
|  |  |  |  |
| **Total that are candidates for migration to OneDrive:** |  |  |  |
| **Home Directories** | 8.32 | 27% | 14,987,430 |
| **Shared Directories** | 9.64 | 31% | 17,946,554 |

At VA’s request, the Contractor shall provide architecture, design, planning, project management, and execution support to migrate to OneDrive for Business, as defined this PWS section 5.0.

The Contractor shall also perform the following One Drive migration specific tasks:

1. Gather data for all locations including OIG, OGC, NSOC, OI+T, Austin, and VACO.
2. Ingest PST back into the users mail box in O365 Exchange Online.
3. Migrate user home drives to OneDrive.
4. Migrate shared paths to SharePoint in O365.

###### Personal Storage Table (PST) Migration to Exchange Online

There are approximately 488K VA workstations with approximately that number of PST files stored either locally or on file shares. VA is looking to migrate all PST data no matter where stored (locally, Fileshare, other) back into each user mailbox in O365.

At VA’s request, the Contractor shall provide architecture, design, planning, project management, and execution support to migrate PST to Exchange Online, as defined this PWS section 5.0.

The Contractor shall also perform the following PST migration specific tasks:

1. Repair PST, if corrected and in of repair. Some users have no PST while others will have multiple PST.
2. Implement settings to prevent new PST from being created after a user’s mailbox has been migrated.
3. After a PST user is ingested back into their mailbox, the Contractor shall remove any Lync to the PST in the user MS Outlook ProPlus client and then delete the PST to free up the storage space.
4. Bring data in PST under management and remove the unmanaged versions in the environment. A small number of users would retain the ability to create PST for eDiscovery and other administrative or technical purposes.
5. Locate, repair and rehydrate into online service. The Contractor shall delete On Premise copy (all locations) of PST with removal of PST link in MS Outlook ProPlus Client upon successful confirmation of user data migrate to Exchange Online.
6. Migrate existing PST data back into user mailboxes.
7. Remove PST from user store locations (local and file share).
8. Remove PST links from user MS Outlook clients to provide a clean experience for end user.

###### Perform O365 Rehydration of EAS/Zovy Archive into Users O365/Exchange Online Mailbox

VA is currently in the process of migrating email users to the Microsoft Office Pro Plus and Office 365. The legacy version of the Exchange system, ranging from Exchange 2003 to 2013, was augmented with an email archiving solution. Zovy Archive was applied to selected users within the organization to archive user mail and control mailbox size.

As part of VA’s migration to Office 365, all email information shall be consolidated, both from existing Exchange systems and from the legacy Zovy Archive, into Office 365. To this end, data should be migrated from the proprietary Zovy Archive system into a format suitable for import into Office 365.This migration should result of a copy of the data in the exported format and allow the existing archive to remain intact. There can be no changes to the source location because of the data export.

The VA data in Zovy Archive is spread out among multiple Regions, implemented systems, and geographic locations. The purpose of this effort is to migrate the archived contents of all email archive environment systems.

VA’s email archive application stores the archive contents in a compressed and single instance manner. The approximate, total compressed size of the archived contents is described in Table 3.

Table 3: VA Exchange Mailboxes

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | # of Mailboxes | Compressed Size | Uncompressed Size | # of Unique messages |
| Region 3 |  | 85TB | 135TB | 867,871,079 |
| Region 4 | 24,951 | 89TB |  |  |
| OI+T/VACO |  | 110TB | 248TB | 1.5 -2 Billion |
| Region 1/ VISN 22 |  | Small | Small |  |

The size written to the target/O365 shall be approximately 500TB of data across all 4 on premise archive locations. The exported data will lose the compressions and deduplication nature of the data in the archive, and will be expected to be much larger.

At VA’s request, the Contractor shall provide architecture, design, planning, project management, and execution support to EAS/Zovy Archive into Users O365/Exchange Online Mailbox, as defined this PWS section 5.0.

The Contractor shall also perform the following specific tasks:

1. Work with stakeholders including VA’s Email Archive and Exchange teams to facilitate the migration.
2. Recommend hardware suitable to export and import the data in a reasonable time frame. A significant amount of processing is required to rebuild messages into the PST format, so the Contractor shall identify hardware requirements for data processing, as well as to stage a significant portion of the data with VA Approval.
3. Perform a sample export of the data for a selected group of users, suitable for test import into the VA Office 365 system.
4. Perform a sample import of the data into O365 Exchange online for a selected group of user confirming the successful migration of data from ZOVY to O365.
5. Perform a production import of all data from Zovy Archive System to O365 Exchange Online.
6. Perform a production export of all data from the Zovy Archive system. All data to be delivered in PST format. For active users, data to be delivered on a per-user basis. User data shall be clearly identified. Data for all active users shall have folder structure intact. All inactive user data shall be exported to PST format as well in a format suitable for eDiscovery search and collection. Per user export may not be required inactive users, but custodians should be identifiable. All message metadata shall be intact.
7. Ensure email data contained in the archive system is exported in a format suitable for import into an Office 365 hosted Exchange system. PST format is recommended.
8. Maintain file stability and integrity, and to increase the reliability of the ingestion process. The Contractor shall ensure PST file size is limited to 2 GB.
9. Export data and ensure certain metadata from the legacy archiving environment which is Zovy Archive is maintained.
10. Direct export from the Zovy Archive. Consumption of the email data in Office 365 is intended for both end user access, as well as for larger eDiscovery and investigatory processes. For end user access, data should be exported on a per user basis. Though this will result in the loss of single instance storage in the exported data, this is required for ingestion into individual users’ mailboxes, and to ensure that users have access only to data associated with their email accounts.
11. Provide custody document tracking as documents move from one system to the other. The Contractor shall report on any messages that were not translated and a reason as to why they were not able to convert.
12. Ensure any folder structure available in the archive is maintained upon export to PST.
13. Ensure continuity of the data and that all data is available for collection and production. All data in the existing Zovy Archive system is subject to eDiscovery, investigative search, and Freedom of Information Act requests.
14. Utilize tools, procedures and processes to guarantee data integrity and meet VA legal and compliance requirements.
15. Produce documentation confirming the migration, suitable for presentation in formal eDiscovery and collection processes, or for compliance/regulatory inquiries.
16. Create a report that must be run inside of the Zovy Archive environment before and after the migration showing that although data was copied out of the system that no information had been purged from the originating archive.
17. Maintain continued operation of the archive, both for end user retrieval and for eDiscovery and FOIA requests, during the migration process.
18. Maintain legacy archive, during data migration, and ensure it remains available to the users and for discovery purposes and the migration must be done by personnel that are trained on Zovy Archive and have setup multiple instances of Zovy Archive to assure the stability during the migration project.
19. VA may or may not continue to use the archive for new data during the migration. If the needs of the VA require continued use of the archive the Contractor shall allow for continued use of the archive for new data and export any new information before the completion of the project.
20. Develop migration confirmation documentation that describes the migration process completed and certifying that all data was migrated, suitable for presentation in formal eDiscovery and collection processes, or for compliance/regulatory inquiries.
21. Create monthly status reports that shall be filed with the overall % of complete and/or any other accomplishments during the period. Coordinate and conduct monthly status meetings.

###### Perform O365 Migration of Backend Lync 2013 Services to Skype for Business

VA seeks to migrate its existing Lync 2013 services IM, Presence, conferencing and dialing ability into conferences from the existing on premises Lync 2013 system to O365 Skype for business including PTSN dial in ability into Skype for business conferencing. VA will not currently leveraging O365’s Skype for Business PBX. VA has recently completed deployment of the Skype for business client to all user in the VA when it deployed MS Office ProPlus as part of its migration of services to O365. There are approximately 400K users accounts in Lync that will be a part of this migration.

At VA’s request, the Contractor shall provide architecture, design, planning, project management, and execution support to migrate Backend Lync 2014 Services to Skype for Business, as defined this PWS section 5.0.

The Contractor shall ensure minimal disruption to user services during the migration. If possible the VA would like to remain in hybrid mode with some on premises Lync servers to facilitate future Unified Communication needs with non O365 providers.

## OPTIONAL (FFP) TASKS AND DELIVERABLES

### [Initiative 1: Enterprise Cloud Program Governance](#_Toc487203620), Program Management/Implementation Capability and Organization Change

The Contractor shall provide and manage an approach to developing a business case for migration to include comparison of current expenditures to proposed expenditures (ranging from facility, hardware, middleware and database, infrastructure etc.), demonstrating ROI of proposed solution, as required.

The Contractor shall evaluate workforce impacts associated with the implementation of modernized, cloud-minded IT service management plans, practices, infrastructures; leverage know, proven practices as applicable; integrate with other similar, ongoing VA efforts to minimize disruption and confusion to workforce and increase effectiveness and efficiencies of approach.

The Contractor shall evaluate the IaaS, SaaS, and PaaS CSP candidates and make recommendations to VA for approval of the CSP.

# GENERAL REQUIREMENTS

## PERFORMANCE METRICS

The table below defines the Performance Standards and Acceptable Levels of Performance associated with this effort.

| Performance Objective | Performance Standard | Acceptable Levels of Performance |
| --- | --- | --- |
| 1. Technical / Quality of Product or Service | 1. Shows understanding of requirements 2. Efficient and effective in meeting requirements 3. Meets technical needs and mission requirements 4. Provides quality services/products | Satisfactory or higher |
| 1. Project Milestones and Schedule | 1. Quick response capability 2. Products completed, reviewed, delivered in accordance with the established schedule 3. Notifies customer in advance of potential problems | Satisfactory or higher |
| 1. Cost & Staffing | 1. Currency of expertise and staffing levels appropriate 2. Personnel possess necessary knowledge, skills and abilities to perform tasks 3. Turnover of Key Personnel | Satisfactory or higher |
| 1. Management | 1. Integration and coordination of all activities to execute effort | Satisfactory or higher |

The COR will utilize a Quality Assurance Surveillance Plan (QASP) throughout the life of the TO to ensure that the Contractor is performing the services required by this PWS in an acceptable level of performance. The Government reserves the right to alter or change the QASP at its own discretion. A Performance Based Service Assessment will be used by the COR in accordance with the QASP to assess Contractor performance.

## SECTION 508 – ELECTRONIC AND INFORMATION TECHNOLOGY (EIT) STANDARDS

On August 7, 1998, Section 508 of the Rehabilitation Act of 1973 was amended to require that when Federal departments or agencies develop, procure, maintain, or use Electronic and Information Technology, that they shall ensure it allows Federal employees with disabilities to have access to and use of information and data that is comparable to the access to and use of information and data by other Federal employees. Section 508 required the Architectural and Transportation Barriers Compliance Board (Access Board) to publish standards setting forth a definition of electronic and information technology and the technical and functional criteria for such technology to comply with Section 508. These standards have been developed are published with an effective date of December 21, 2000. Federal departments and agencies shall develop all Electronic and Information Technology requirements to comply with the standards found in 36 CFR 1194.

The following Section 508 Requirements supersede Addendum A, Section A3 from the T4NG Basic PWS.

The Section 508 standards established by the Architectural and Transportation Barriers Compliance Board (Access Board) are incorporated into, and made part of all VA orders, solicitations and purchase orders developed to procure Electronic and Information Technology (EIT). These standards are found in their entirety at: <https://www.access-board.gov/guidelines-and-standards/communications-and-it/about-the-section-508-standards/section-508-standards> and <http://www.section508.gov/content/learn/standards>. A printed copy of the standards will be supplied upon request.  The Contractor shall comply with the technical standards as marked:

§ 1194.21 Software applications and operating systems

§ 1194.22 Web-based intranet and internet information and applications

§ 1194.23 Telecommunications products

§ 1194.24 Video and multimedia products

§ 1194.25 Self-contained, closed products

§ 1194.26 Desktop and portable computers

§ 1194.31 Functional Performance Criteria

§ 1194.41 Information, Documentation, and Support

### EQUIVALENT FACILITATION

Alternatively, offerors may propose products and services that provide equivalent facilitation, pursuant to Section 508, subpart A, §1194.5. Such offerors will be considered to have provided equivalent facilitation when the proposed deliverables result in substantially equivalent or greater access to and use of information for those with disabilities.

### COMPATIBILITY WITH ASSISTIVE TECHNOLOGY

The Section 508 standards do not require the installation of specific accessibility-related software or the attachment of an assistive technology device. Section 508 requires that the EIT be compatible with such software and devices so that EIT can be accessible to and usable by individuals using assistive technology, including but not limited to screen readers, screen magnifiers, and speech recognition software.

### ACCEPTANCE AND ACCEPTANCE TESTING

Deliverables resulting from this solicitation will be accepted based in part on satisfaction of the identified Section 508 standards’ requirements for accessibility and must include final test results demonstrating Section 508 compliance.

Deliverables should meet applicable accessibility requirements and should not adversely affect accessibility features of existing EIT technologies. The Government reserves the right to independently test for Section 508 Compliance before delivery. The Contractor shall be able to demonstrate Section 508 Compliance upon delivery.

Automated test tools and manual techniques are used in VA Section 508 compliance assessment. Additional information concerning tools and resources can be found at <http://www.section508.va.gov/section508/Resources.asp>.

**Deliverable**

1. Final Section 508 Compliance Test Results

## ORGANIZATIONAL CONFLICT of INTEREST

Please be advised that since the awardee of this Task Order will provide advisory support, systems engineering, technical direction, specifications, work statements, and evaluation services, some restrictions on future activities of the awardee may be required in accordance with FAR 9.5 and the clause entitled, Organizational Conflict of Interest, found in Section H of the T4NG basic contract. The Contractor and its employees, as appropriate, shall be required to sign Non-Disclosure Agreements (Appendix A).

# APPENDIX A

CONTRACTOR NON-DISCLOSURE AGREEMENT

This Agreement refers to Contract/Order \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ entered into between the Department of Veterans Affairs and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Contractor).

**As an officer of** <fill in name of Contractor>**, authorized to bind the company, I understand that in connection with our participation in the** <fill in program> **acquisition under the subject Contract/Order, Contractor’s employees may acquire or have access to procurement sensitive or source selection information relating to any aspect of** <fill in program> **acquisition. Company**<fill in name> **hereby agrees that it will obtain Contractor - Employee Personal Financial Interest/Protection of Sensitive Information Agreements from any and all employees who will be tasked to perform work under the subject Contract/Order prior to their assignment to that Contract/Order. The Company shall provide a copy of each signed agreement to the Contracting Officer. Company** <fill in name> **acknowledges that the Contractor - Employee Personal Financial Interest/Protection of Sensitive Information Agreements require Contractor’s employee(s) to promptly notify Company management in the event that the employee releases any of the information covered by that agreement and/or whether during the course of their participation, the employee, his or her spouse, minor children or any member of the employee’s immediate family/household has/or acquires any holdings or interest whatsoever in any other private organization (e.g., contractors, offerors, their subcontractors, joint venture partners, or team members), identified to the employee during the course of the employee’s participation, which may have an interest in the matter the Company is supporting pursuant to the above stated Contract/Order. The Company agrees to educate its employees in regard to their conflict of interest responsibilities.**

Company <fill in name>further agrees that it will notify the Contracting Officer within 24 hours, or the next working day, whichever is later, of any employee violation. The notification will identify the business organization or other entity, or individual person, to whom the information in question was divulged and the content of that information. Company <fill in name>agrees, in the event of such notification, that, unless authorized otherwise by the Contracting Officer, it will immediately withdraw that employee from further participation in the acquisition until the Organizational Conflict of Interest issue is resolved.

This agreement shall be interpreted under and in conformance with the laws of the United States.

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Signature and Date Company

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Printed Name Phone Number

CONTRACTOR EMPLOYEE

PERSONAL FINANCIAL INTEREST/PROTECTION OF SENSITIVE INFORMATION AGREEMENT

This Agreement refers to Contract/Order \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ entered into between the Department of Veterans Affairs and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Contractor).

As an employee of the aforementioned Contractor, I understand that in connection with my involvement in the support of the above-referenced Contract/Order, I may receive or have access to certain “sensitive information” relating to said Contract/Order, and/or may be called upon to perform services which could have a potential impact on the financial interests of other companies, businesses or corporate entities. I hereby agree that I will not discuss or otherwise disclose (except as may be legally or contractually required) any such “sensitive information” maintained by the Department of Veterans Affairs or by others on behalf of the Department of Veterans Affairs, to any person, including personnel in my own organization, not authorized to receive such information.

“Sensitive information” includes:

1. Information provided to the Contractor or the Government that would be competitively useful on current or future related procurements; or
2. Is considered source selection information or bid and proposal information as defined in FAR 2.101, and FAR 3.104-4; or
3. Contains (1) information about a Contractor’s pricing, rates, costs, schedule, or contract performance; or (2) the Government’s analysis of that information; or
4. Program information relating to current or estimated budgets, schedules or other financial information relating to the program office; or (e) Is properly marked as source selection information or any similar markings.

Should “sensitive information” be provided to me under this Contract/Order, I agree not to discuss or disclose such information with/to any individual not authorized to receive such information. If there is any uncertainty as to whether the disclosed information comprises “sensitive information”, I will request my employer to request a determination in writing from the Department of Veterans Affairs Contracting Officer as to the need to protect this information from disclosure.

I will promptly notify my employer if, during my participation in the subject Contract/Order, I am assigned any duties that could affect the interests of a company, business or corporate entity in which either I, my spouse or minor children, or any member of my immediate family/household has a personal financial interest. “Financial interest” is defined as compensation for employment in the form of wages, salaries, commissions, professional fees, or fees for business referrals, or any financial investments in the business in the form of direct stocks or bond ownership, or partnership interest (excluding non-directed retirement or other mutual fund investments). In the event that, at a later date, I acquire actual knowledge of such an interest or my employer becomes involved in proposing for a solicitation resulting from the work under this Contract/Order, as either an offeror, an advisor to an offeror, or as a Subcontractor to an offeror, I will promptly notify my employer. I understand this may disqualify me from any further involvement with this Contract/Order, as agreed upon between the Department of Veterans Affairs and my company.

Among the possible consequences, I understand that violation of any of the above conditions/requirements may result in my immediate disqualification or termination from working on this Contract/Order pending legal and contractual review.

I further understand and agree that all Confidential, Proprietary and/or Sensitive Information shall be retained, disseminated, released, and destroyed in accordance with the requirements of law and applicable Federal or Department of Veterans Affairs directives, regulations, instructions, policies and guidance.

This Agreement shall be interpreted under and in conformance with the laws of the United States.

I agree to the Terms of this Agreement and certify that I have read and understand the above Agreement. I further certify that the statements made herein are true and correct.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature and Date Company

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Printed Name Phone Number