**SAMPLE – For Reference Only** – This sample is a redacted copy of a work statement accomplished under a NITAAC GWAC. A Statement of Work (SOW) is typically used when the task is well-known and can be described in specific terms. Statement of Objective (SOO) and Performance Work Statement (PWS) emphasize performance-based concepts such as desired service outcomes and performance standards. Whereas PWS/SOO's establish high-level outcomes and objectives for performance and PWS's emphasize outcomes, desired results and objectives at a more detailed and measurable level, SOW's provide explicit statements of work direction for the contractor to follow. However, SOW's can also be found to contain references to desired performance outcomes, performance standards, and metrics, which is a preferred approach. **This sample is not all inclusive, therefore the reader is cautioned to use professional judgment and include agency specific references and regulations to their own PWS/SOO/SOW.**

Supplies or Services/Prices

# Brief Description of Services

Enterprise Architecture and Portfolio Management Support

# Statement of Work

The Contractor shall furnish all of the necessary personnel, materials, services, facilities, (except as otherwise specified herein), and otherwise do all the things necessary for or incident to the performance of the work as set forth below.

# Introduction

This Statement of Work (SOW) defines the requirements and work scope for supporting, Installations in the conduct of its Enterprise Architecture support and Portfolio Management activities, including support of annual system review, the Enterprise Software Licensing Agreement program and IT Procurement Request (ITPR) review efforts.

# Background

Provide a description of the background of this project.

# Scope of Work

The Contractor shall provide analytical, technical, and management support to <AGENCY>, Enterprise Architecture Branch. The scope of this SOW is focused on two major programs, the Enterprise Architecture Support and the Portfolio Management Support. The Enterprise Architecture support shall focus on providing and implementing a standardized, aligned, synchronized Enterprise Architecture (EA) framework within, linking business, data, applications, technology and security across the organization. The Portfolio Management support shall focus on providing analytical, technical, and management support for timely execution of - annual systems review, application consolidation, system analysis, the Enterprise Licensing Agreements (ELA) program, and review efforts.

# Objectives

The Contractor shall provide analytical, technical, and management expertise in support of enterprise architecture and portfolio management activities. The Contractor shall assist <AGENCY> in consolidating applications/systems, reducing legacy networks, standardizing and optimizing naval bases’ operations and services through enterprise architecture, managing and maintaining the portfolio management program, and fostering the transition of applications/systems/ networks and infrastructure to an IT environment that meets requirements. <AGENCY> Objectives include:

* Support in development, implementation and management of a standardized, aligned, synchronized Enterprise Architecture (EA) framework within , linking business, data, applications, technology and security across the organization, Information Management (IM) Strategic Planning, and capital planning and investment strategies in support of <AGENCY>'s business management, IT programs and Enterprise Architecture efforts.
* Support in development, implementation and management of the IT Portfolio Management program, and provide guidance, professional advice and recommendations on IT Portfolio Management matters.
* Provide IT subject matter expertise to assist in reviewing IT procurement requests and managing portfolios of applications, systems, and networks.
* Assist in managing, supporting and maintaining the Enterprise Licensing Agreements (ELA) program; consolidating applications, reducing legacy systems, reducing software licensing costs, and supporting the IT System Annual Review efforts for <AGENCY>.

# Tasks

## Enterprise Architecture Support

The Contractor shall facilitate appropriate EA discussions, conduct interviews, gather artifacts, and prepare various reports that capture strategic intent for offices in order to forecast "To-Be" future state EA analysis. The Contractor shall review business structure (including <AGENCY>'s key management activities, such as strategic planning, human capital management, IT investment management, and information security management), and develop action plans for collecting “as-is” and “to-be” IT architecture descriptions.

1. Maintain the EA Program Management Plan, an EA Project Management Plan and a comprehensive EA project plan that fully describes the overall EA activity and reflects General Accountability Office (GAO) "Organizational Transformation: A Framework for Assessing and Improving Enterprise Architecture Management (Version 2.0)" published August 5, 2010. (GAO-10-846G); update/revise EA Program Management Plan and EA Project Plan, as needed.
2. Develop Baseline and Target Architecture, EA Transition Plan, EA Communication Plan, EA Guiding Principles, EA Governance Structure, Information/Data Architecture, Applications Architecture, Information Technology Architecture, Business Architecture, and IT Security Architecture.
3. Prepare recommendations for the standardization of Enterprise Architecture through the Regions and HQ of the enterprise.
   1. Conduct a deep analysis on operations and services of installations based on the reciprocal maturity of the "As-Is" and "To-Be" states and then make recommendations on operations and services standardizations and optimization and action plans.
   2. Develop comprehensive operations and services analysis and recommendations report for each Installation and Region within Enterprise. Installation Recommendations reports shall be based on the conduct of surveys, operations and services analysis results, gap analysis comparing “As-Is” to the “To-Be”, market research and reviews for IT compliance.
4. Install, train, manage and maintain MEGA HOPEX Platform tool, which is a MS SQL server-based tool that enables <AGENCY> to conduct easy, quick operational Enterprise Architecture analysis, supporting product building and data integrity across all architectures, standardize architecture development, and provide support for decisions for future planning and fiscal forecasting.
5. Evolve the breadth and scope of content in the EA repository; build custom reports based on executive user requirements; integrate models from other tools into IT programs/projects.
6. Update or revise Capital Planning Processes to align with EA guidance, as requested.
7. Develop and populate EA Services Reference Model and EA Technical Reference Model based on Installation Recommendations reports.
8. Define scope, prepare curriculum, and deliver an annual EA workshop for the EA community; define scope, prepare curriculum, and deliver and at least one EA workshop limited to the EA Core team.
9. Prepare EA Reviews for projects and services working with the appropriate offices or service managers on all required elements.

## Portfolio Management Support

The Contractor shall provide assistance to Enterprise Architecture Branch in providing analytical, technical, and management support for timely execution of – Annual Systems Review activities, the Enterprise Licensing Agreements (ELA) program, and review efforts and maintain close coordination with Government Designated Approving Authority in support of the ITPR review for <AGENCY>. The Contractor shall ensure compliance with waiver request procedures for use of Open Source Software and requirement for proof of software support. The Contractor shall assist <AGENCY> Branch in managing, supporting and maintaining the Enterprise Licensing Agreements (ELA) program; consolidating applications, reducing legacy systems, reducing software licensing costs, and supporting the IT System Annual Review efforts for . The Contractor shall participate in IT portfolio management discussions/meetings with <AGENCY>, and interface and maintain effective working relationships with <AGENCY>, and regional point of contacts (POCs), regional Portfolio Management leads, <AGENCY>, and Program Managers/systems owners.

1. Support in development, implementation and management of the IT Portfolio Management program, and provide guidance, professional advice and recommendations on IT Portfolio Management matters, Information Management (IM) Strategic Planning, and capital planning and investment strategies in support of 's business management, IT programs and Enterprise Architecture efforts.
2. Register, manage and maintain IT systems/applications/networks in – and Application Data Management System (DADMS). Support the IT System Annual Review efforts for <AGENCY>. Review and approve analysis of new or updated software on system requirements to determine merits, whether additional information is needed, impact on major program items, technology updates, market research to determine similar and less costly software availability, possible consolidations, etc. Assist <AGENCY> in managing and maintaining application/system/network portfolios in – and <AGENCY>; coordinating and tracking all projects assigned and maintain records of all portfolio activities and applications supported; and providing support for legacy application reduction efforts including technical advice and support to <AGENCY>.
   1. Review mandated applications to ensure that the mandate is valid and has not been superseded by new policy, applications, or business processes.
   2. Assist in conducting the – Annual System review; coordinate with system/application owners as appropriate to provide and maintain accurate answers to questionnaires provided in the – Annual System review task.
   3. Validate applications, including reviewing application information and descriptions to ensure applications are correctly placed in the taxonomy, identifying missing information, and recommending appropriate taxonomy changes on an ongoing basis.
   4. Provide support for the applications rationalization/ standardization effort; manage and evaluate existing applications/systems/networks and identify strengths and weakness where value is diminished and transitions or removes non-compliant programs.
   5. Support / Functional Area Manager (FAM) to approve new systems/applications.
   6. Provide support for, <AGENCY> and CIO data calls related to <AGENCY> applications, systems and networks.
   7. Maintain knowledge of oversight, planning, analysis, implementation, and enhancement of <AGENCY> IT systems, policies, procedures, and tools, provide authoritative analysis, decisions, and recommendations, coordinate with various program managers/system owners, meet with <AGENCY> IT teams, and participate in the development of <AGENCY>-wide policy, initiatives, and solutions to critical issues.
   8. Maintain strong interpersonal competence and personal effectiveness perform a broad range of assignments with efficiency and accuracy and manage multiple projects/tasks in a professional and timely manner.
   9. Provide Ad Hoc, Monthly/Quarterly and Annual Reviews with System/Application Metrics.
3. Provide IT subject matter expertise (SME) to assist <AGENCY> Branch in reviewing IT procurement requests, and managing portfolios of applications, systems, and networks.
4. Assist <AGENCY> Branch in managing, supporting and maintaining the Enterprise Licensing Agreements (ELA) program, consolidating applications, reducing legacy systems, and reducing software licensing costs.
   1. Establish, manage, support and maintain the Enterprise Licensing Agreements (ELA) program for <AGENCY>.
   2. Serve as an expert of the ELA program, implement enterprise licensing guidance and policy issued by <AGENCY> and provide recommendations on ELA funding commitments.
5. Review and conduct analysis of software licenses procured for the <AGENCY> Service Delivery Point (SDP)/Data Center to determine their actual deployment and usage.
   1. Provide the results of assessment of deployment and use of software products for the SDP. These include confirming licensing requirements, determining actual deployment and usage, and verifying compliance with applicable software agreements.
   2. Develop SDP asset management procedures and guidance on report/update/change of hardware and software used for the SDP.

# Required Skill Set

The Contractor working on this contract must have experience working with the Federal Government, <AGENCY> and have technical expertise in the areas of portfolio management, enterprise architecture and governance. <AGENCY> specific qualification requirements are identified below:

1. The Contractor shall meet the following minimum requirements:
   1. Hold a Secret clearance.
   2. Minimum 4-year college degree (master’s degree preferred) in Engineering, Computer Science, or Information Systems from a U.S. government approved accredited college/university.
   3. Minimum of 5-years work experience related to IT.
   4. High level of communication skills (written and oral).
2. The Contractor shall have demonstrated experience and extensive understanding of each of the following, but not limited to:
   1. Leadership, teamwork, inter-personal skills, business case development, business process review, and strategic planning, and project management.
   2. Application/system/network portfolio management, system analysis, enterprise software licensing agreements, IT procurement support.
   3. Enterprise architecture support, modeling, building block design, applications and role design, systems integration, business change management, EA standards, EA methods/tools, EA MEGA HOPEX platform, asset management, migration/ transaction planning, EA security, data interchange, and data management.
   4. Working knowledge of IT system/application analysis, and industry EA best practices.
   5. Architecture Framework (DoDAF). The OMB Federal Enterprise Architecture Framework (FEAF); including scope, direction, and governance practices.
   6. General Accountability Office (GAO) EA Maturity Management Framework (EAMMF) model, how it is scored and how to advance against the scorecard. The Open Group Architecture Framework (TOGAF), Zachman and FEA framework models in advancing Agency strategic goals.
   7. EA Best-practice experience from other Federal agencies.
   8. Working relationships experience with IT program and program managers to understand their role in evolving the Agency and EA.