



U.S. General Services Administration

Federal Acquisition Service

GSA TRANSITION COORDINATION CENTER

TRANSITION HANDBOOK *NETWORX, WITS 3, AND GSA REGIONAL LOCAL SERVICES TO ENTERPRISE INFRASTRUCTURE SOLUTIONS (EIS) CONTRACTS*

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1 Purpose

The General Services Administration (GSA) developed this handbook for agencies and other stakeholders to facilitate a successful, timely, and orderly transition of services from the expiring Networkx, Washington Interagency Telecommunications Systems (WITS) 3, and GSA Regional local service contracts to the Enterprise Infrastructure Solutions (EIS) contracts.

This document advocates the importance of coordination and cooperation among transition stakeholders. This is achieved by (1) defining a standardized approach for all agencies across the government, (2) recommending a sequence of transition events, (3) describing transition roles and responsibilities, and (4) providing guidance on transition processes and procedures from the agencies' perspective. This handbook provides a framework for agencies to manage a successful transition by describing the essential activities to prepare for, execute, and track transition. It includes an overview of activities agencies perform to order services under the new contracts and complete their transitions.

2 Background

GSA's Network Services 2020 (NS2020) Strategy represents a portfolio of contracts that provide the flexibility and agility to support agency migrations to future technologies while adhering to the high-level objectives laid out in the Information Technology (IT) Reform Plan and Digital Government Strategy. NS2020 enables interoperability and furthers the migration from legacy technologies to a converged Internet Protocol (IP) environment with common, core security standards through an expansive array of modern telecommunications and IT service offerings. As part of the "Infrastructure Solutions" component of NS2020, the EIS contracts provide high-quality telecommunications and network services and solutions that meet or exceed agency requirements, conform to government policies and standards, and offer competitive pricing. EIS provides continuous competition to satisfy specific networking projects, emerging requirements, technology refreshment, and access to innovative solutions. The combination of more services, greater competition, and improved performance provides significant incentive to transition to EIS.

3 Successful Transition

In addition to the benefits of transitioning to EIS, stakeholders must be mindful of the critical schedule for completing transition. GSA is committed to supporting agencies through transition; however, it is up to the agencies to execute transition before the Networkx, WITS 3, and GSA Regional local service contracts expire, either by competitively ordering replacement services on EIS or by justifying a sole-source action to move existing services from the current provider's Networkx, WITS 3, and GSA Regional local service contracts to their EIS contract, if that is available. The Networkx Universal contracts expire in March 2020, while Networkx Enterprise, WITS 3, and most GSA Regional local service contracts expire in May of 2020 (ten of them expire October 17,

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2019 and one expires February 1, 2020). Agencies must begin planning early and have detailed plans, current inventories, resources, and processes in place to execute transition as soon as the EIS contracts are awarded. Agencies must expect to complete transition by March/May 2020 to maximize the savings from EIS prices and avoid the disruption caused by the expiration of the existing contracts. Therefore, many related actions, such as developing task order solicitations, should be completed prior to the award of the EIS contracts.

NOTE REGARDING CONTINUITY OF SERVICE: Agencies should plan to complete their transition by March 2020. Some agencies will have challenges completing by that timeframe. The Networx contracts have a 365-day continuity of service period that allows for services to continue to operate at the last year of contract pricing which would allow services to continue to March/May 2021. However, caution is important when considering the continuity of service period. A continuity of service period is exercised on an already-expired contract. Once this period ends, there is NO opportunity to extend the contract or services. Agencies that plan transitions with a March 2021 completion date will not have a timely transition.

The transition process is subject to significant risks, including that the current service provider is not awarded an EIS contract or selected through the Fair Opportunity (FO) process and that the selected service provider is unable or unwilling to execute all transition requirements as expected or within the timeline to avoid gaps in service continuity. Agencies should not expect further extension of the expiring contracts and should plan to complete transition by March/May 2020 or consider alternative approaches to avoid service gaps. GSA advises the agency to carefully review and consider the guidance offered in this Transition Handbook, Fair Opportunity and Ordering Guide, and EIS Management and Operations (MOPS) Handbook as well as other training and guides available on gsa.gov/eis and gsa.gov/eistransition, particularly noting the lessons learned from previous transitions and how they can be incorporated into the transition to EIS. The agency must establish and maintain effective oversight throughout transition, and escalate problems with the service providers to GSA with documentation.

In concert with agency customers, contractors, and oversight organizations, GSA is implementing a transition strategy that capitalizes on lessons learned from previous transitions to affect a successful transition. The key elements of this strategy follow:

3.1 Involvement of the Agency's highest levels and key functional areas

The engagement of executive management is critical to secure and focus the resources across the agency to plan and implement the transition, to track progress, and to respond to risks. GSA asks each agency to identify, by name, an executive sponsor for the transition. Another fundamental requirement is early assignment of a Lead Transition Manager (LTM) and a Transition Ordering Contracting Officer (TOCO) that understands

the Federal Acquisition Regulation (FAR) and agency's policies for selecting a contractor and has a repertoire of workable approaches to meet the agency's transition requirements.

3.2 Agency Transition Plan

Agencies must develop a transition plan and provide it to GSA. GSA will track this as a critical milestone to be completed by October 2016, with updates and additional detail as needed throughout transition. Agencies should plan with sufficient flexibility to coordinate transition with other ongoing activities regardless of the impact of external events. For example, the change of presidential administration in 2017 could have significant impact, and agencies' plans should consider the impact.

3.3 Early and effective support from GSA to Agencies

From the earliest agency engagements, GSA will provide tailored support to each agency appropriate to its transition approach, especially for the contractor selection, or FO process (see FAR Subpart 16.505). GSA will work with the existing Networx, WITS 3, and GSA Regional local service contractors to conduct the initial validation of inventory and maintain the inventory throughout transition. GSA will provide training for ordering on the EIS contracts based on the EIS Fair Opportunity and Ordering Guide available on gsa.gov/eistransition.

3.4 Phased, orderly approach

GSA will coordinate with agencies and contractors to develop a recommended sequence of transition orders to achieve early progress, level resource demands, and minimize backlogs. GSA will work with all stakeholders to guide transition through this sequence.

3.5 Transparency and meaningful reporting

GSA will define and openly track major milestones and report agencies' progress to the Office of Management and Budget (OMB). Measures of transition progress will be developed in collaboration with agencies and contractors and will be representative of business volume and the complexity of services being moved.

4 Transition Overview

Transition is a critical component of a larger, agency evolution where agencies upgrade their network equipment and architecture to reflect new applications, new security approaches, increased traffic, and potentially, changing network traffic patterns.

For the purposes of this handbook, transition is defined as the movement of services from the expiring Networx, WITS 3, and GSA Regional local service contracts to EIS and continues until all services have been disconnected. Transition planning, execution, and management activities are critical to a successful transition to EIS and require participation by all relevant stakeholders. Agencies using Networx, WITS 3, and GSA Regional local service contracts have the primary responsibility for completing transition

successfully; accordingly, they should have an executive level sponsor for the agency's transition.

GSA, as the owner of the contracts, executes activities necessary for transition through three integrated functions: the Program Management Office (PMO), Customer Engagement, and the Transition Coordination Center (TCC). The PMO supports the agencies' transition by establishing the EIS vehicles and managing the contractors. Customer Engagement is responsible for ensuring that appropriate and effective support is provided to each agency during their transition to EIS. Within the Customer Engagement Division, each agency is assigned an Agency Manager (AM) listed on gsa.gov/nspsupport, and that AM has overall responsibility for the management of GSA support to that agency. Any other GSA organization providing support to an agency (such as the TCC) works with oversight from the AM. The program's TCC provides Government-wide transition planning, execution, progress tracking, and reporting. GSA established the TCC, which is staffed by both GSA and contractor personnel, to assist and support agencies with the movement of services from the expiring contracts to EIS. The TCC interacts extensively with agencies, existing contractors, EIS contractors, and oversight organizations such as the OMB and Government Accountability Office (GAO).

4.1 Transition Approach

In its report GAO-06-476, *TELECOMMUNICATIONS: Full Adoption of Sound Transition Planning Practices by GSA and Selected Agencies Could Improve Planning Efforts*, June 2006, the GAO identified the following best practices for conducting effective transition planning:

1. Establish an accurate telecommunications inventory and an inventory maintenance process
2. Perform a strategic analysis of telecommunications requirements and use this to shape the agency's management approach and guide efforts when identifying resources and developing a transition plan
3. Establish a structured management approach that includes a dedicated transition management team that will use clear lines of communications in addition to key management processes, such as project management, configuration management, and change management
4. Identify the funding and human capital resources that the transition effort will require
5. Develop a transition plan that includes transition objectives, measures of success, risk assessment, and a detailed timeline

In a subsequent audit of transition practices, GAO reported in GAO-14-63, *TELECOMMUNICATIONS: GSA Needs to Share and Prioritize Lessons Learned to Avoid Future Transition Delays*, December 2013, that each agency should treat the transition as a "critical project." As such, the agency should develop a transition project management plan that includes "a timeline of all activities that need to be completed,

taking into account priorities relative to the agency's mission critical systems, contingency plans, and identified risks." Agencies' transition teams, including project managers, telecommunications specialists, and contracting officers, should develop the Agency Transition Plan (ATP) and coordinate with executive leadership, such as the Chief Information Officer (CIO) as executive sponsor and other executives such as the Chief Financial Officer, Chief Acquisition Officer, and Chief Human Resources Officer as appropriate. An outline to the ATP is included in Appendix B to facilitate this process. The Agency Transition Sponsor must e-mail the ATP to the TCC at eistcc.ta@gsa.gov by October 2016. The TCC will provide it to the GSA's Assistant Commissioner of Federal Acquisition Service (FAS)/Information Technology Category (ITC) and to OMB. The standardized format and required delivery ensure all stakeholders—including and especially the contractors—are aware of the agency's plan and can better support meeting the agency's objectives in conjunction with the overall objectives of the transition program.

4.2 Transition Sequence of events

To keep the focus on timely transition, GSA has identified critical milestones for agencies to meet. These, along with other common steps in transition, comprise the following activities necessary for agencies to successfully complete transition:

- **PRIOR TO AWARD OF EIS CONTRACTS**
 - Develop funding requirements and coordinate with agency budget submissions for fiscal year (FY) 2017 – 2020. Task Orders on EIS require funding at the time of issue; therefore, it is critical that agencies budget for installation charges for services on EIS starting in FY17 and for monthly services starting in the fiscal year services are anticipated to begin. GSA can help estimate those charges and advise on strategies to minimize the cost to the agencies. For additional information, contact your AM.
 - Identify the Agency Transition Sponsor
 - Understand EIS services, management and operations requirements, and pricing structure; become familiar with the EIS Request for Proposal (RFP) (see gsa.gov/eis) and subscribe to Interact at <https://interact.gsa.gov/eis> for real-time notifications of updates
 - Appoint both a Lead Transition Manager (LTM) and Transition Ordering Contracting Officer (TOCO) and identify the transition organization (see Section 5, Roles and Responsibilities)
 - Confirm existing Networx, WITS 3, and GSA Regional local service inventories to ensure they are accurate and current by October 2016; for instructions go to gsa.gov/eistransition
 - Evaluate current technical solutions and develop transition planning for target technical solutions, including upgrades, transformations, retirement, or other changes
 - Develop Agency Transition Plan (ATP) by October 2016 that clearly identifies the number of FO solicitations for transition, incremental transition costs, and a schedule for transition. Specifying FO plans or solicitation

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forecasts will help agencies manage the work, and sharing those plans with GSA and the EIS contractors will allow greater collaboration and management of resources for all involved.

- Estimate human resource requirements and coordinate with agency staffing and training plans for FY 2016-2020
 - Initiate solicitations for the FO process to select EIS contractors, such as RFPs for complex requirements and RFQs for simple requirements
 - Attend training and request a Delegation of Procurement Authority (DPA) from GSA to agency Ordering Contracting Officers (OCOs)
 - Execute an Interagency Agreement (IAA) with GSA for assistance, as applicable.
- **AFTER AWARD OF EIS CONTRACTS**
 - Conduct FO selection of contractor(s) and award fully-funded Task Orders (TOs)
 - Update ATP as appropriate and share with GSA
 - Provide GSA AM updated FO solicitation forecasts and estimated release dates at least quarterly beginning in July 2017. GSA will share these solicitation forecasts with EIS contractors to allow them to plan for responding
 - Order services for transition on EIS
 - Order disconnects on Networx, WITS 3, and GSA Regional local service contracts.

Figure 1 below, Transition Sequence of Events, depicts a sequence of events and deadlines for agencies to successfully accomplish transition activities. Note that in order to expedite the FO process, agencies are advised to begin preparing their solicitations in advance of EIS award and expect to release those solicitations as soon as possible after award. A detailed list of transition activities for agencies is provided in Appendix E.

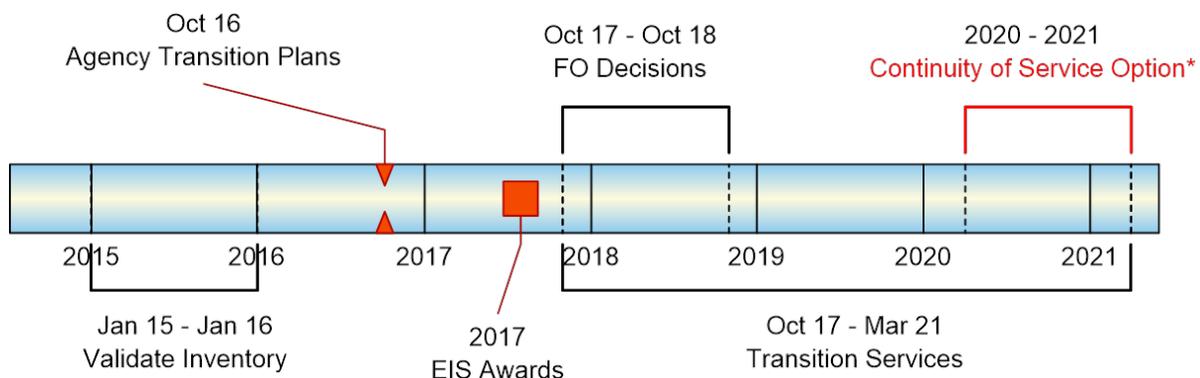


Figure 1: Transition Sequence of Events

* See Section 3, "NOTE REGARDING CONTINUITY OF SERVICE."

5 Roles and Responsibilities

This section describes the roles and responsibilities of key personnel for transition to EIS.

5.1 Agency Transition Sponsor

Each agency should have an executive level manager that sponsors the agency's transition project; the lessons learned in previous transitions highlight the need for this support. The sponsor likely would be the CIO or executive of the organization to which the transition manager and team report or that otherwise has influence to secure the financial and human resources for the transition. The sponsor serves as a spokesperson to senior agency leadership, is the primary interface and partner to GSA executives, and is the agency's representative accountable to oversight organizations, such as OMB. Important activities for the Agency Transition Sponsor include approving the agency's ATP and serving as an escalation path. For department level agencies, the sponsor should represent all components within the department.

5.2 Agency Transition Managers

Each agency should have a Lead Transition Manager (LTM) and may also designate other supporting transition managers (TMs). A TM is a Government employee (or appointed contractor) who leads the planning, management, and implementation of the agency's transition of services from Networx, WITS 3, and GSA Regional local service contracts to EIS. The LTM develops the ATP; acts as the central point of contact to GSA's TCC; executes, tracks, and reports transition activities; and escalates issues to GSA as appropriate. In GAO-14-63, GAO reported that "weaknesses in agencies' project planning also contributed to the delays" in the transition to Networx. Therefore, the LTM must have strong project management, communications, and interpersonal skills and be a recognized leader within the agency.

The process for establishing a transition team starts with the Agency Transition Sponsor designating the LTM for the agency. The sponsor communicates this designation to GSA. The LTM may then designate other supporting TMs for the agency.

Agency TMs:

- Engage agency staff to address requirements
- Provide overall project management of the agency's transition to EIS, including meeting milestone deadlines and managing project risks
- Plan and prepare agency-specific transition strategies and the ATP along with more detailed plans as needed
- Execute, track, and report on activities of the overall transition to ensure that the Agency Transition Sponsor, agency management, GSA, and oversight groups are well aware of the status and any jeopardies to meeting the schedule
- Identify the Agency-Bureau (AB) codes that fall under the authority of the agency, any hierarchical organization of those codes, and the mapping of Agency

- Hierarchy Codes (AHCs) to AB codes
- Confirm the agency's inventory of services to transition
- Ensure transition orders are placed in a timely fashion; prioritize orders for services that have lengthy or complex installations
- Anticipate the possibilities of changing service providers or services (such as changing connectivity requirements or solutions other than like-for-like replacement) during the transition effort and mitigate those factors in transition plan(s)
- Build time into transition plans to allow time for contract modifications, if needed
- Serve as the interface to the GSA TCC
- Coordinate training by GSA for the agency's transition team and support personnel
- Escalate issues to GSA, the EIS contractors, or agency management and Agency Transition Sponsor as appropriate
- Submit or validate and forward requests for agency personnel to access transition systems in order to centrally control who has what authorities within each system.

5.3 Ordering Contracting Officers

The agency's Ordering Contracting Officers (OCOs), or other officials who have authority to obligate the agency's funds, are critical to the success of transition and, therefore, must be part of the agency's transition team from the outset. The Transition Ordering Contracting Officer (TOCO), as a key member of the transition team, is the agency's acquisition lead for facilitating all of the agency's OCOs' use of the EIS contracts; this is a role new to the transition to EIS after learning during the transition to Networkx the importance of the OCOs' familiarity with ordering telecommunications services. The TOCO is a critical communication link between GSA and the OCOs within the agency to share best practices for using the EIS contracts, identify OCOs to receive training from GSA regarding ordering from EIS, and access GSA's acquisition experts for EIS for advice and scope questions.

OCOs are responsible for following the ordering procedures, including the FO selection of contractors, in compliance with the Federal Acquisition Regulation (FAR), the terms and conditions of the EIS contracts, and any agency policies to place TOs on the EIS contracts. Ordering telecommunications services involves understanding components that are not commonly included in other IT solutions and can require the agency to describe complex network requirements and evaluate disparate proposals or quotations for their solutions. The agency should assign OCOs with experience in telecommunications acquisitions and must ensure the OCOs participate in training that GSA and the EIS contractors offer. GSA has a program to assist agencies with ordering, and agencies can get help by contacting their GSA AM.

For agencies to place TOs on the EIS contracts and to ensure ordering complies with procurement statutes and policies, agencies' OCOs must attend training and receive a Delegation of Procurement Authority (DPA) from GSA. DPA Training (FAC066) can be

accessed on the Defense Acquisition University website found at <https://www.dau.mil/>.

5.4 GSA Full Service (Regional Local Services)

All agencies currently using services provided by the GSA Regional local service contracts formerly administered in GSA Regions 1-10 are participating in GSA's Full Service program. As of October 3, 2017, GSA will not be offering Full Service on EIS. Agencies participating in the Full Service program need to order their replacement services directly from the EIS contractors.

GSA is committed to supporting agencies throughout this Full Service transition with the assistance to agencies' procurement teams as they make their FO decisions. Agencies that are taking advantage of GSA assistance from the Transition Ordering Assistance (TOA) consultants can include local service in the task order requirements. Agencies may also request GSA's assistance with the Solicitation/SOW Assist Tool and EIS Pricer. Agencies that need assistance with analyzing their inventory can request that from GSA; this assistance does not, however, include site surveys. GSA will coordinate with the agencies to ensure all current GSA Regional local services are transitioned to EIS as well as any new requirements.

GSA can share with agencies the work GSA had previously done to prepare for transitioning local services provided through the Full Service program. This includes:

1. Draft SOW Solicitation
2. RFI Response Analysis
3. Tips for developing a cost estimate for transitioning services
4. Guidelines for accessing Full Service inventory

This documentation provides information to facilitate the transition of Regional local service from the Full Service program to the EIS contracts. In addition, GSA will publish a separate plan specific to transitioning local services. It will define roles and responsibilities and provide guidance pertaining to GSA owned/managed buildings, shared infrastructure, and the nuances of coordination with GSA as the customer-of-record for existing services. It will include the process for coordination among GSA, the agency, and the contractors for transitioning services, including shared tenant locations, number portability, and disconnects. Although detailed processes will vary from Region to Region and even location to location, this guidance provides a wide range of information on the processes that are necessary, as well as possible strategies, to accomplish a majority of the transition activities for existing Regional local service.

6 Lessons Learned from Previous Transitions

In its report GAO-14-63, *GSA Needs to Share and Prioritize Lessons Learned to Avoid Future Transition Delays*, December 2013, GAO recommended GSA "fully archive, share, and prioritize lessons learned" from the previous transition to Networx. GSA collected lessons learned from previous transitions, predominately from FTS2001 to Networx, and

this Transition Handbook addresses many of them, especially those that pertain to agencies' activities. The complete list of those lessons learned is in Appendix C. Furthermore, GSA conducted a comprehensive analysis of the lessons learned. GSA prioritized the lessons and incorporated the significant items into the strategy for NS2020 and transition to EIS; Section 3 of this document reflects those that pertain to transition.

7 Transition Planning

As stated in Section 4.1 of this document, each agency must prepare an Agency Transition Plan (ATP). The ATP is an important tool for communicating the agency's requirements, expectations, and approach to other transition stakeholders, including GSA, OMB, and contractors. The ATP must address at least the topics defined in Appendix B, Agency Transition Plan Outline. The Agency Transition Sponsor is to approve and deliver this plan to the TCC at eistcc.ta@gsa.gov within one year after release of the EIS RFP, that is, by October 2016. The TCC will provide it to the GSA's Assistant Commissioner of Federal Acquisition Service (FAS)/Information Technology Category (ITC) and OMB. GSA will review the ATP and provide feedback to the agency. The ATP will guide the agency's transition and, therefore, the LTM should update it as needed to remain current and relevant.

Transition planning at the agency level involves identifying key personnel and forming an Integrated Transition Team, confirming inventory, defining requirements and determining the order placement process, and arranging for GSA assistance as needed. The following sections outline these planning activities.

7.1 Identify Key Agency Personnel

The following are key personnel for an agency's Integrated Transition Team:

- Agency Transition Sponsor
- LTM and supporting TMs
- TOCO and other OCOs for the agency (or personnel with authority to obligate the agency's funds)

Depending on an agency's transition requirements, there may be a need to identify additional staff for implementation of transition activities. These resources may come from within an agency or be support contractors and can include financial analysts and billing personnel, local site contacts, information assurance or IT security experts, or network engineers.

7.2 Confirm Inventory

GSA's role in inventory establishment is to develop, validate and maintain an accurate Transition Inventory (TI). Building on lessons learned from previous transitions, GSA has conducted the validation of the TI to relieve the agencies of the burden of this labor-intensive and time-consuming task. Validation consisted of a comprehensive comparison of billing and inventory data GSA has collected over the course of the Networx, WITS 3,

and GSA Regional local service contracts with that of the contractors on those vehicles. GSA completed TI validation in January 2016 and subsequently provided the TI to the agencies to confirm it is sufficiently complete and accurate for transition planning and tracking. The TI is accessible to authorized agency users through the GSA EMORRIS application. GSA continues to validate and update the transition inventory on a monthly basis as new records are identified, services disconnected, and discrepancies are reconciled.

Confirmation of accurate Networx, WITS 3, and GSA Regional local service inventories ensures agencies and stakeholders have a comprehensive understanding of the services that must be disconnected and provides information for planning for the initial growth of services on EIS. TI confirmation is a critical requirement for a successful transition as identified in the Networx Lessons Learned. An accurate and complete inventory:

- Assists agencies with transition planning by identifying the services to be transitioned and subsequently disconnected from Networx, WITS 3, and GSA Regional local service contracts
- Serves as the database of record for measuring transition progress in a consistent manner across all agencies, contractors, and services
- Serves as an input to the GSA provided on-line site for transition tracking
- Must be confirmed by October 2016; agencies signal completion of the confirmation by asserting such in the ATP. For more assistance with the confirmation process, please see the instructions at gsa.gov/eis or contact eistcc.inventory@gsa.gov.

To further support agencies as they develop their Statements of Work (SOWs) and to provide data for transition service orders, the TCC has created a more detailed inventory called the All Agency Inventory (AAI). AAI extends current TI data to a more detailed level, to include individual Contract Line Item Numbers (CLINs), features, equipment, bandwidth, and other data not currently included in TI. The data is primarily based on contractor inventory, billing, and orders for Networx, WITS 3, and Regional local service contracts. Output of this data is available upon a request to the TCC through the AM. The TCC offers agency level detail records and over 30 different reports summarizing the data in a myriad of ways for agency use and dissemination. The normalization and consistency of data used for ordering should result in faster ordering from the FO process to provisioning, and implementation to billing verification.

7.3 Define Requirements and Order Placement Process

EIS service requirements are driven by agency-specific mission needs and operational models. Requirements for EIS ordering should be determined by conducting a complete analysis of an agency's current inventory of telecommunications services and its future operational needs. The agency should carefully

Define Requirements
Contact your AM for assistance with writing an SOW or solicitation.

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consider how to approach enterprise transformations or network optimizations; it may be more effective to address these complex projects as part of normal network management and not assume they have to be done during transition. Conversely, if the agency's requirements are well developed and funded, transition may be the best time to complete these projects. With those requirements in mind, the agency should become familiar with the appropriate requirements in the EIS contracts, paying particular attention to performance specifications for services in Section C, management and operations requirements in Section G, service level agreements, and deliverables. This analysis will determine how the EIS service offerings can best meet an agency's needs. Requirements can then be grouped into one or more TO solicitations, using SOWs as needed, and a contractor can be selected through the process in compliance with FAR 16.505 to meet the agency's requirements.

The steps for defining requirements and determining the order placement process include:

- Determine and document requirements
- Conduct market research
- Develop acquisition plan (inclusive of the Independent Government Cost Estimate, or IGCE)
- For all acquisitions above the micro purchase threshold (\$3,500) fair opportunity is required, however the requirements differ based on the dollar thresholds in FAR 16.505, as explained in the following paragraphs.

Above \$3500 but below \$150K:

- Provide each awardee a fair opportunity to be considered for each TO
- If the order does not exceed the simplified acquisition threshold, the OCO need not contact each of the awardees under contract before selecting a TO awardee if the OCO has information available to ensure that each awardee is provided a fair opportunity to be considered for each TO.

Above \$150K but below \$5.5M:

- Provide a fair notice of the intent to make a purchase, including a clear description of the supplies to be delivered or the services to be performed and the basis upon which the selection will be made to all contractors offering the required supplies or services under the contract
- Afford all contractors responding to the notice of a fair opportunity to submit an offer and have that offer fairly considered.

Above \$5.5M:

- A notice of the solicitation that includes a clear statement of the agency's requirements
- A reasonable response period (as defined by the OCO on the solicitation)
- Disclosure of the significant factors and sub-factors, including cost or price that the

- agency expects to consider in evaluating proposals, and their relative importance
- If the award is made on a best value basis, a written statement documenting the basis for award and the relative importance of quality and price or cost factors
- An opportunity for a post award debriefing
- Analyze requirements to determine whether a contractor can be selected based on available information or if the agency needs information from the contractors
 - For pre-priced contract items or to request additional discounts, the agency must define requirements in the solicitation
 - For more complex, customized, or un-priced (Individual Case Basis—ICB) requirements, the agency will need to compose those requirements and include them in the solicitation
- Decide how many solicitations are appropriate and develop them. Each solicitation can result in one or more TOs upon selection of the contractor(s)
- Determine order placement process to be used in compliance with FAR 16.505 and in accordance with the terms and conditions of the contract
- Conduct fair opportunity, as required and according to the defined order placement processes
- Award a TO(s) based on the results of the FO process; TO(s) must be fully funded
- Place service orders against TO(s), including reference back to the TO(s).

GSA has published a Fair Opportunity and Ordering Guide for additional guidance (see gsa.gov/eistransition).

7.4 Arrange for GSA Assistance

7.4.1 GSA-Assisted Transition

For agencies that have very straight-forward transitions and have limited staff to conduct the transition, GSA can assist with the FO process and placing orders. An example of a transition that could meet this requirement is a smaller agency with only voice services and basic internet connectivity requirements through Networx; although, other types of services could also qualify. The agency will execute an IAA with GSA that specifies the type and level of support, such as pricing comparison reports, assistance with using GSA's Solicitation/SOW Assist Tool, or assistance with executing task orders on EIS. GSA will contact agencies that are candidates for this assistance, or agencies may inquire through their AM.

7.4.2 Transition Assistance

For agencies not in the GSA-Assisted Transition program, GSA offers assistance in other forms. While each agency is responsible for its own transition to EIS, agencies may request GSA's assistance with transition activities. For example, help is available for the following:

- Inventory Confirmation
- Solicitation Development

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- Pricing Research
- Transition Planning
- Training
- Ordering Process

GSA provides assistance tailored to each agency's needs, and agencies can request assistance as needed as well as receive dedicated assistance. GSA can help agencies through the FO process and ordering services from the EIS contract, including analyzing customer requirements, proposing solutions and assessing their feasibility, making recommendations for service selection, determining the cost of the services, selecting an EIS contractor, and guiding customers on placing orders for those services.

Dedicated assistance for transition ordering is in the form of third-party contractor support. The TCC funds the Transition Ordering Assistance (TOA) task order under a GSA contract in order to provide direct contractor support.

An agency can request assistance by contacting its AM at GSA and should certainly consider it while developing the ATP and include any requirements in that plan when delivering it to GSA prior to the EIS award. The assistance offered by GSA is available to the agencies for a specific set of requirements, on a reimbursable basis, and is not meant to augment an agency's staff or perform inherently government functions. GSA and each agency receiving services from the task order establish an IAA. GSA retains overall task order administration, project management, funding, and performance-monitoring responsibilities for this task; the agency supports GSA by identifying in the IAA a project manager (PM) at the agency who will monitor the contractor's performance, including deliverables, and report quarterly to the task order COR. The PM also integrates the consultant contractors into the procurement team conducting the FO activities, including the Ordering Contracting Officer (OCO), as well as financial, program office, and technical experts.

7.4.3 GSA TCC Training Plan

The GSA TCC Training Plan for EIS consists of courses designed to assist agencies with the transition to EIS. Training modules are available through Instructor Led Training (ILT) and eLearning modules. To find out what training is available and how to access it, see www.gsa.gov/eistransition.

Training modules include the following topics:

- EIS Fundamentals
- Transition Inventory
- Telecommunications 101 and EIS Pricing Structure
- EIS Pricer
- Fair Opportunity and Ordering Guide
- DPA

- EIS Management and Operations Handbook
- Introduction to GSA Conexus

8 Transition Management and Implementation

8.1 Award Task Orders

GSA's Fair Opportunity and Ordering Guide provides more detailed guidance on the process, and the Management and Operations (MOPS) Handbook (gsa.gov/eis) explains the ordering and billing requirements in the EIS contracts. The summary information below can assist with planning.

When developing task order solicitations, agencies should be mindful of factors that can facilitate or expedite the task order award process and result in the best solution at the best price. Variations are certainly allowable but may increase the time for contractors to develop proposed solutions and can increase cost. These factors include:

- Minimizing customized service level agreements or billing requirements beyond those specified in the EIS contracts
- Providing detail to describe requirements more comprehensively, for example, including the transition inventory for services to be replaced
- Describing requirements functionally rather than as pre-defined technical solutions or specific products
- Using pricing templates structured similarly to those in the EIS contracts.

Through the order placement process for each set of requirements, the agency's OCO will select the EIS contractor best suited to provide the required services and execute a TO with the contractor. The OCO must obligate sufficient funds on the TO to cover the base period of the TO. Agencies may elect to place service orders. If elected, service orders must be within scope of the TO and EIS contract, and cannot obligate funds or exceed the established funding on the TO. The funding obligation on the TO may be a not-to-exceed (NTE) amount. Subsequently, the agency may begin placing service orders against the TO following the process described in Section 8.2, Ordering Process.

8.2 Ordering Process

Once the TO has been awarded, the agency orders service directly from the selected EIS contractor, within the scope, prices, ceiling value, and terms and conditions of the OCO-awarded TO. The TO must identify the OCOs and Contracting Officer's Representatives (CORs) who have authority to order services. The selected EIS contractor may consult with the agency to expedite the ordering process and to provide the tools needed to ensure that all orders are properly placed. The EIS contractors may also provide training to the agency on placing orders for their services.

During the ordering process, agencies should be mindful of lessons learned from previous transitions.

- Do not assume a back office transition will be easier than changing contractors or will not be service-affecting; many of the same transition activities still need to be completed
- If a selected solution requires the contractor to modify the EIS contract, that modification will take time
- Replacing equipment requires close coordination to ensure the new equipment is available and acceptable so as not to introduce delays
- Different contractors and service providers may use different physical addresses for the demarcation of service delivery; the agency may have to provide the address as well as LAT/LONG coordinates and ensure the contractor is able to identify the correct demarcation prior to dispatching to the location.

8.3 Service Implementation

Delays in service implementation can be reduced by incorporating the following lessons learned:

- Before approving an implementation plan or site survey, ensure services meet the agency's technical and operational requirements, for example all 800 numbers should be included in the site survey
- Advise contractor of any special access requirements for the site
- Make arrangements for the contractor's technicians to access the site and avoid unnecessary 'turn a-ways'
- Ensure local contacts understand the plan for their site including the type of cutover (parallel, managed, or coordinated) planned
- Have material/equipment installed and ready on scheduled cutover date (for example cabling, inside wiring, Private Branch Exchange (PBX) cards, or other Government Furnished Equipment (GFE))
- Have needed technicians and local vendors—such as PBX vendors—on hand for both pre-test and cutover.

8.4 Transition Tracking and Reporting

GSA tracks transition across the government and reports the progress of activities to ensure transition occurs on schedule. GSA's TCC uses tracking data to analyze trends to identify problems with a specific contractor, a certain service, or an agency in need of transition assistance and to formulate resolutions proactively. Tracking and reporting EIS transition status enables the EIS PMO, GSA senior management, agencies, and the contractors to forecast the complexity and duration of transition for financial and human resource planning. It also allows decision-makers to track progress against the impending expiration of the Networx, WITS 3, and GSA Regional local service contracts and take action if needed.

GSA's tracking of EIS transition progress employs three methods of data collection and analysis:

- Record agency decisions and plans that indicate an agency's readiness for

transition

- Measure the extent to which services are being implemented on EIS contracts and are being disconnected from expiring Networx, WITS 3, and GSA Regional local service contracts
- Inspect reports to identify major or chronic issues or negative trends.

Measures and tools to track transition progress have been developed and will be refined as needed. They currently include measures of the rate of disconnected services from Networx, WITS 3 and Regional local service contracts as well as the growth of business on the EIS contracts. A sample of a dashboard report for large and medium agencies is in Appendix D.

8.5 Stakeholder Communications for Transition

Communications with stakeholders play a critical role in the successful transition of an agency's telecommunications services. Several methods of communication have been established to assist agencies with communications throughout transition. These methods include:

- Infrastructure Advisory Group (IAG)
- Help Desk
- EIS Transition websites

8.5.1 Infrastructure Advisory Group (IAG)

The IAG provides guidance to GSA on its IT and telecommunications programs. It assists with developing a consensus on common issues that affect multiple agencies; as such it will attend to the development of new GSA contracts. The IAG promotes collective government planning related to the transition to the EIS contracts.

8.5.2 Help Desk

GSA's IT Customer Service Center (ITCSC) is available to agency customers and contractors to help resolve issues and questions regarding transition. The ITCSC does not replace the EIS, Networx, WITS 3, or GSA Regional local service contractors' customer service or trouble management services. It is primarily a means for contacting the TCC and the GSA program team. Agencies can reach the ITCSC by calling 855-482-4348 or email at itcsc@gsa.gov.

Help Desk

For assistance, contact your AM
(gsa.gov/nspsupport)
or the IT Customer Service Center (855) 482-4348,

8.5.3 EIS Transition Website

The TCC stood up the EIS Transition website to communicate activities specific to transition at gsa.gov/eistransition and continues to manage this website within the GSA web infrastructure to support the transition to EIS. The transition website provides transition guidance to federal agency customers and shares transition status with the agencies and the general public. Tools on the website include a wide variety of support

documents such as Standard Operating Procedures (SOPs) and guides; transition training such as video learning; Frequently Asked Questions (FAQs) and other basic resources; and, as appropriate, data on transition status. Updates on EIS and a link to the EIS Transition website are also available on gsa.gov/eis.

8.6 Disconnects

Disconnecting an agency's Networkx, WITS 3, or GSA Regional local services is the last milestone in transition to EIS. For every EIS transition order there should be corresponding Networkx, WITS 3, or GSA Regional local service disconnect orders. Coordinated and synchronized disconnects and activation by different service providers are essential to ensure transition success. The TI also reflects Networkx, WITS 3, and GSA Regional local service disconnects for services moved to other contract vehicles or disconnected and not replaced.

9 Summary

Telecommunications services must transition from expiring Networkx, WITS 3 and GSA Regional local service contracts. GSA provides guidelines and direct assistance to agencies on managing the transition of their services to EIS contracts. Agencies can request additional information on transitioning Networkx, WITS 3 and GSA Regional local services to EIS from their GSA AM or by contacting the ITCSC.

Disconnects

For more information concerning disconnecting Networkx, WITS 3, or GSA Regional local services, please see the redacted contracts for your contractor.

Contact Us

For more information on Networkx, NS2020, or EIS, please contact your AM (gsa.gov/nspsupport) or the IT Customer Service Center (855) 482-4348, ITCSC@gsa.gov.

Appendix A – Acronym List

AAI:	All Agency Inventory
AB Code:	Agency Bureau Code
AHC:	Agency Hierarchy Code
AM:	Agency Manager
ATP:	Agency Transition Plan
CIO:	Chief Information Officer
CLIN:	Contract Line Item Number
COR:	Contracting Officer's Representative
DPA:	Delegation of Procurement Authority
EIS:	Enterprise Infrastructure Solutions
ELearning:	Electronic (computer based) Learning
EMORRIS:	Enhanced Monthly On-Line Records and Reports of IT Services
FAR:	Federal Acquisition Regulation
FAS:	Federal Acquisition Service
FAQ:	Frequently Asked Questions
FO:	Fair Opportunity
FY:	Fiscal Year
GAO:	Government Accountability Office
GFE:	Government Furnished Equipment
GSA:	General Services Administration
IAA:	Interagency Agreement
IAG:	Infrastructure Advisory Group
ICB:	Individual Case Basis
IGCE:	Independent Government Cost Estimate
ILT:	Instructor Led Training
IP:	Internet Protocol
IT:	Information Technology
ITCSC:	Information Technology Customer Service Center
ITC:	Information Technology Category
LL:	Lessons Learned
LTM:	Lead Transition Manager
MOPS	Management and Operations
NS2020:	Network Services 2020
NTE:	Not-to-exceed
OCO:	Ordering Contracting Officer
OMB:	Office of Management and Budget
OTS	GSA's Office of Telecommunications Services
PBX:	Private Branch Exchange
PM:	Project Manager
PMO:	Program Management Office
RFP:	Request for Proposal
RFQ:	Request for Quote
SOP:	Standard Operating Procedure

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SOW:	Statement of Work
TBD:	To be determined
TCC:	Transition Coordination Center
TI:	Transition Inventory
TM:	Transition Manager
TO:	Task Order
TOA:	Transition Ordering Assistance
TOCO:	Transition Ordering Contracting Officer
TOPS:	Telecommunications Ordering and Pricing System
WITS 3:	Washington Interagency Telecommunications System 3

Appendix B – Agency Transition Plan Outline

1 Project Scope and Charter

Describe the business needs, current understanding of needs of users across the agency, and services the project is intended to provide. Include the following areas:

- Purpose or justification
- Measurable objectives and success criteria
- High-level requirements
- High-level risks
- Summary milestone schedule
- Summary budget.

2 Leads for Integrated Transition Team

Identify names and contact information for the following roles:

2.1 Agency Transition Sponsor

Chief Information Officer (CIO) (or other) Senior Executive Service Sponsor – Lessons learned from previous transition have highlighted the need for an executive level manager that sponsors the agency's transition project. The sponsor likely would be the CIO or executive of the organization to which the transition manager and team report or that otherwise provides the financial and human resources for the transition. The sponsor serves as a spokesperson to higher levels of management, is the primary interface and partner to GSA executives, and is the agency's representative accountable to oversight organizations. Important activities for the Agency Transition Sponsor include approving the agency's Transition Plan and serving as an escalation path.

2.2 Lead Transition Manager

Each agency should have a Lead Transition Manager (LTM) and may also designate other supporting transition managers (TMs). The LTM acts as the central point of contact for the planning, management, and implementation of the agency's transition of services from Networx, WITS 3 and GSA Regional local service contracts to EIS.

2.3 Transition Ordering Contracting Officer (TOCO)

The agency's Transition Ordering Contracting Officers (TOCOs) are critical to the success of transition and, therefore, must be part of the agency's transition team from the outset. The TOCO is the agency's lead for facilitating the use of the EIS contracts. TOCOs are responsible for following the ordering procedures, including the FO selection of contractors, in compliance with the Federal Acquisition Regulation (FAR) 16.505, the terms and conditions of the EIS contracts, and any agency policies to place task orders (TOs) on the EIS contracts. The agency should assign TOCOs with experience in telecommunications acquisitions and must ensure the TOCOs completes and receives certification in GSA's Delegation of Procurement Authority (DPA) training.

2.4 Escalation Path to Agency Transition Sponsor

List the management structure (names, roles, and contact information) that links the LTM and TOCO to the Agency Transition Sponsor.

3 Support Organization

3.1 Integrated Transition Team Members

Describe the other organizational functions within the agency that will participate in transition planning and execution, such as supporting TMs, financial analysts and billing personnel, local site contacts, information assurance or IT security experts, or network engineers.

3.2 Support Contractors

Agencies may require contractor support to assist in the following areas:

- Inventory information gathering
- Inventory validation
- Transition Plan writing or review of vendor agency transition planning documents
- Technical assistance in assuring that services are ordered to replace existing services
- Defining requirements and selecting contractors through the FO process
- Order writing: both installation orders and disconnect orders
- Technical assistance at the time of transition to assist in problem resolution
- Site surveys to assure that agency facilities are ready for vendor installation of services and equipment
- Transition scheduling and transition tracking.

3.3 AHC Structure

Identify which AHCs fall under the authority or scope of the agency for transition.

4 Strategy

4.1 Agency priorities and objectives during transition

- Like for like, transformations, enhancements
- Competing or complementary activities
- Verification and testing

4.2 FO decisions

- Approach for solicitations to select EIS contractor(s). Describe the scope of requirements to be grouped into each solicitation, quantity of solicitations and expected resulting task order(s), evaluation criteria, staff quantity and skill level of source selection team.
- Requested GSA assistance, such as: acquisition support, GSA-assisted transition, training, or self-help with GSA guidance

4.3 Schedule

Include milestones from master schedule and additional detail of activities. Include expected release and award dates for each FO decision.

5 Inventory Analysis

5.1 Summary by service type, quantities, locations

5.2 Equipment condition

5.3 Confirmation status

6 Mission Analysis

6.1 Constraints

Discuss moratoriums, blackout or quiet periods, planned projects affecting transition, and new mission plans

6.2 Risks

6.3 Jeopardies

Appendix C – List of FTS2001 to Networx Lessons Learned

LL #	Lesson
1	The replacement of the telecommunications infrastructure for a large part of the federal community is a huge task. The transition stakeholders (that is GSA, the user Agencies and the gaining service providers) need to be fully prepared for the undertaking.
2	A funding mechanism like the Transition Fund is strongly recommended for any future transition efforts similar to FTS2001.
3	To make Agency resource planning easier, it is recommended that guidelines based on the “Taxonomy” document be established early enough in the budget cycle for Agencies to do the financial planning required to ensure that needed resources are available.
4	The reimbursement plan between GSA and the Agencies should be based on clear financial criteria that result in predictable Agency impact.
5	A complete and accurate “baseline” inventory prior to contract award is critical. In order to facilitate this requirement it is suggested that inventory validation should be an on-going effort during the life of the contract to provide a complete and accurate baseline for not only transition, but also other operations such as billing validation and service optimization.
6	The roles and responsibilities of all transition stakeholders (that is GSA, Agencies, and service providers) should be clearly defined and communicated to ensure critical activities are appropriately performed.
7	Many Government requirements cannot be met by standard Commercial services. Although commercial solutions are encouraged, solicitation documents and all planning must include Government unique requirements.
8	Agencies should be prepared for the ‘worse-case’ scenario of their current service provider either not being awarded a successor contract or not being selected through the fair opportunity process and plan accordingly in order to ensure a rapid transition effort with minimal impact on the continuity of service.
9	A “one size fits all” approach to program management must be avoided since Agency capabilities differ widely. For each Agency will likely not have the same transition experience. At the same time, the approach must ensure that the needs of all Agencies, large and small, are being addressed. The approach either needs to ensure that resources are available when the plan requires or that the plan can be tailored to fit the available resources
10	Agencies should anticipate and account for the new service provider’s possible inability or unwillingness to execute all transition requirements as expected thus ensuring that they (a) Establish and maintain effective oversight throughout transition and escalate problems with the service providers to GSA with documentation, and (b) GSA should anticipate and be prepared to deal with service provider’s possible inability or unwillingness to meet contractual obligations.

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LL #	Lesson
11	Overall transition planning should have sufficient flexibility so that Agencies can coordinate transition with other ongoing activities regardless of the impact of external events. Likewise, contracts should be flexible to accommodate unforeseen marketplace issues.
12	Coordinated and synchronized disconnects and activation by different service providers are essential to ensure transition success.
13	Agencies should consider whether network optimization would be more effectively addressed as part of normal network management or during transition.
14	The planning activities of the transition stakeholders (that is GSA, Agencies, and service providers) should be coordinated to ensure all activities are appropriately accounted for and that dependencies are adequately addressed.
15	The task of transition is not limited to transitioning a static list of services on a like-for-like basis. Therefore, Agencies should anticipate the need for changing connectivity during the transition effort and mitigate those factors in their transition plan(s).
16	Care should be exercised when determining the MRGs to be offered to ensure that (a) They do not become an impediment to Agency choice and competition in the future, (b) They do not become a disincentive to winning contractors to aggressively move forward; In short, MRGs should be managed so as not to impede the transition effort.
17	The delay in Agencies selecting their vendors significantly impacted the timeline for transition. Therefore, a “deadline” for vendor selection should be incorporated into the overall transition schedule.
18	Agency procedures and resources were inadequate to manage the extraordinary volume of service orders associated with the transition effort.
19	Agencies responsible for slow contractor selection, transition planning and/or order entry that directly results in extension of incumbent contract(s) and services should bear the costs associated with those extensions.
20	In any future efforts, service providers should be held to the required levels of service from contract award (including the transition period).
21	Agencies should ensure their plans accommodate for potential issues associated with access facilities, as often service providers do not control the entire provisioning process.
22	Service providers need to apply sufficient, properly trained resources in order to meet the identified transition goals.
23	Future transition planning should not permit transition to begin until service provider support systems are in-place, tested, and accepted. Further, service providers should be required to deliver support systems for both Commercial and Government unique services that meet Government expectation prior to contract award.

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LL #	Lesson
24	Some delays could be avoided if Agencies (a) Take care not to approve a TPSP or site survey if services are not in fact what they need to operate (e.g. all 800 numbers were not included in site survey); (b) Advise service provider of any special access requirements for the site, (c) Make arrangements for the entry of service provider technicians into site in order to avoid unnecessary ‘turn a-ways’; (d) Ensure that they know and understand the plan for their site including the type of cutover (parallel, managed, or coordinated) planned; (e) Have material/equipment installed and ready on scheduled cutover date (e.g. cabling, inside wiring, PBX cards, or other GFE equipment); (f) Have needed technicians on hand for both pre-test and cutover (e.g. PBX technician was not present on scheduled test dates resulting in dialing plan problems).
25	GSA and Agencies should proactively examine invoices during transition to verify that services are being invoiced against the right contract and the right rate and that the details of billing meet contract requirements. Also, billing discrepancies should be brought to the attention of service providers promptly and GSA must hold them responsible for resolving billing problems expeditiously.
26	The progress of transition should be measured by both the “old” services replaced and disconnected as well as by the “new” services installed.
27	Government should specify the information required from the service providers relative to transition progress as opposed to the method by which it is delivered. Further, how information is captured and presented by the service provider and GSA needs to be carefully documented for the Agencies and the Agencies need to be flexible as to how they can manipulate and use this data.
28	Effective and consistent transition metrics should be established and agreed upon by all transition stakeholders prior to contract award.
29	GSA will encourage participation from customer Agencies so that they are intimately familiar and comfortable with the structure of the contracts well before they are awarded. This will help reduce the learning curve after award.
30	Contractor ordering processes need to be integrated with TOPS (or replacement) ordering processes.
31	Require secure FTP servers be operational at award.
32	Redefine the period for measuring the intervals.
33	Include requirement in solicitation for toll free number to allow users to verify they are on the selected contract.
34	If CSDS still exists, combine requirements for voice services and CSDS.
35	Investigate Ways to Improve the Timeliness of Fair Opportunity Decisions
36	Separate intervals for switched and dedicated access, calling cards.
37	Require Caller ID to include a name.
38	Require contractors to accept bulk order disconnects.
39	Provide a solution for Agencies to see their inventories behind GSA Systems.

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LL #	Lesson
40	Define transition reimbursement requirements and process in advance of RFP and include requirements to accommodate the process.
41	The ability for agencies to buy comprehensive network solutions from a single source (GSA) should remain an important one in planning for NS2020
42	Contracts should have broad enough scopes to account for changes in technology and pricing methods
43	The range of OTS Regional Offices services offered should be broadened in order to better fulfill customers' needs and to move on from the current business model
44	The NS2020 portfolio of service offerings should facilitate customers' adoption of emerging technology trends, such as the proliferation of cloud services and wireless network access
45	Enable access to solutions through the entire ITS portfolio of services and capabilities
46	Establish an integrated portfolio of contract vehicles to serve the full range of agency needs
47	Establish complementary contracts matching agency buying patterns to market segments
48	Ultimately, both the National and Regional Office programs must ensure that future contracts and support services satisfy agency mission requirements with excellent value. The OTS national and regional offices should cooperatively plan the future program portfolio that addresses the variable needs of agency headquarters and field units using an appropriate mix of national and regional contracts.
49	Agencies should engage Agency COs in the beginning of the transition process. Suggest creating Agency Tiger Teams (with key stakeholders) for appropriate dissemination of pertinent transition related information.
50	Build lead/lag time into the transition plan to accommodate time for contract modifications.
51	Capture Local Government Contact (LGC) information from order to Service Order Completion Notice (SOCN) then to inventory.
52	Develop measurement standard for the inventory and determine inventory elements.
53	Transition Inventory (TI) should include a requirement to be updated when new or replacement circuit IDs are introduced.
54	When adding or modifying a service or contractual requirement, consideration should be given to what impact it will have on the process for reimbursing transition costs.
55	GSA's stakeholder outreach efforts should be extended and strengthened to increase the early involvement and buy-in of higher-level Federal managers such as CIOs and their immediate representatives, as well as OMB's Resource Management Office (RMO) and Office of E-Government & Information Technology.

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LL #	Lesson
56	Any structural disincentives to collaboration, such as variable revenue recognition across OTS contracts, should be identified and addressed.
57	Proper incentives for OTS national and regional programs to work together should be formalized. This includes regions working with each other.
58	GSA should strive for more effective collaboration among OTS program staff and COs, as well as more effective coordination with external stakeholders.
59	Transition Managers should be associated with AB Codes.
60	GSA should provide expanded outreach support for smaller agencies to focus and address specific transition needs and options. Provide follow-up support for preparing and completing fair opportunity decisions and support tool training.
61	Maintain Agency TM information and status throughout contract lifecycle. Accurate and current agency contact information will enable GSA to coordinate planning, communication, and outreach for the next transition.
62	Explore other incentives, in addition to Transition Reimbursement, to provide sufficient motivation for agencies to execute their fair opportunity decisions and transition.
63	Voice service PICed to service provider prior to SOCN, resulting in commercial billing. This Impacts "transition" and "new" service orders. Need flexibility to allow IXC to re-rate charges, or to prevent PIC from occurring prior to SOCN.
64	Dedicate trained personnel to handle disconnects.
65	Do not assume that a back office transition will be easier than change of provider. Many of the same transition elements still need to be coordinated with a back office transition.
66	Centralize ordering system process but decentralize ordering.
67	Provide drop down list of valid values for Agencies to select from when documenting fair opportunity decisions.
68	Revisit the Definition of Billing SLAs
69	Clear definition of account ownership – who is the directly responsible individual – for each account’s satisfaction should be defined.
70	GSA should provide a means for agencies to obtain third party acquisition assistance either directly through the OTS or through a partnership between OTS and other GSA service.
71	GSA should anticipate customers to want more extensive and continuous support from OTS for complex FO decisions.
72	GSA should establish an outreach and governance model that recognizes the perspectives of finance, acquisition, and information technology, and promotes coordination between senior executives in these organizations.
73	Equipment replacement actions were inaccurate and took an excessive amount of time
74	Back office transition (BOT) process' were not rapid, efficient and non-service-affecting

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LL #	Lesson
75	Numerous CLINs that were amended or changed on an order did not receive transition credit
76	Agencies need to get a copy of the vendors' inventory files that will allow them to do a better job of reconciling inventory
77	Multiple and repetitive reconciliations of TOPS inventory as a result of not being centrally managed
78	Inventory problems (1) Baseline and (2) complexity of reconciliation and validation with agencies, vendors and local LECs
79	Innovative approaches to minimize the FO impact to agency customers should be sought. Examples of approaches to be considered include GSA making some FO decisions during initial contract award and offering pre-awarded, "turn-key" services, which would be similar to many current regional operations.
80	GSA should anticipate agency customers to increasingly require OTS to (a) Provide significant support to facilitate transitions, and/or (b) Structure the contracts and transition processes to ease agency workloads
81	OTS should propose the integration of the IMC into the Federal Chief Information Officer Council (CIOOC), given the similar missions and synergies of the two governance boards. This will ensure top-level attention to infrastructure activities.
82	Contractor's ordering and invoicing processes and systems have an impact on the success of the TCR process.
83	Agency COs should meet with GSA's Program COs for and advice and scope determinations questions.
84	Agencies should consider the effectiveness of separating Wide Area Network (WAN) decision from other systems.
85	Identity contract modifications for inside wiring, since most inside wiring is ICB on FTS2001 and Networx.
86	Separate TIC solution Fair Opportunities from Transition Fair Opportunity decisions.
87	Agency should conduct Requests for Information (RFI) when writing their SOW.
88	Complete decisions on definitized CLINS first before the other decisions needed for the Agency.
89	Agencies need a vendor supplied website that will provide a physical address for all data Networx services for validation of demark or service addresses
90	Improve usability and interface of GSA's Networx Unit Pricer
91	Make Lessons Learned, FAQs and Knowledge Base readily available to Agencies.
92	Agencies should continuously and regularly validate their inventory throughout the Networx contract-monthly if possible.
93	Networx Pricer needs mechanism for pricing current inventory.
94	Vendor OSS/notifications were unreliable and need to be sent in accordance with GSA established SLAs

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LL #	Lesson
95	The regional business model, including service offerings, should be adjusted to account for changes in technology.
96	GSA should provide more proactive OTS responses to unexpected issues as they arise, before they result in significant negative consequences.

Appendix D – Sample Dashboard Reports for Large and Medium Agencies' Transition Progress

Large Agencies

EIS Transition Phases Scorecard: Large Agencies												
Date: 8/31/2017		Acquisition Planning					Acquisition Decision		Transition Execution		Overall % Complete	
AB Code	Agency	Acq Plan % Completion	ITT Assigned (ATS, TOCO, & LTM)	IAA Signed	TI Access	ATP Submitted	FO Solicitations Released	TOs Awarded	Transition 50% Complete (SIR PWV % Disc)	Transition 100% Complete (SIR PWV % Disc)	Overall % Complete	
Date Due			6/30/2016	5/31/2017	10/31/2016	10/31/2016	10/31/2017	10/31/2018	6/30/2019	3/31/2020		
1200	DEPARTMENT OF AGRICULTURE	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/26/2016		0.0%	22.6%	22.6%	25.9%	
1300	DEPARTMENT OF COMMERCE	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/26/2016		0.0%	16.4%	16.4%	23.8%	
9721	DEPARTMENT OF DEFENSE	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/31/2016		0.0%	19.4%	19.4%	24.8%	
8900	DEPARTMENT OF ENERGY	55.0%	ITTs Assigned	Drafted	Full	Completed: 11/21/2016		0.0%	8.8%	8.8%	21.3%	
7500	DEPARTMENT OF HEALTH AND HUMAN SERVICES	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/31/2016		0.0%	24.7%	24.7%	26.6%	
7000	DEPARTMENT OF HOMELAND SECURITY	50.0%	ITTs Assigned	Drafted	Partial	Completed: 10/31/2016		0.0%	13.8%	13.8%	21.3%	
1500	DEPARTMENT OF JUSTICE	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/28/2016		0.0%	28.2%	28.2%	27.7%	
1600	DEPARTMENT OF LABOR	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/31/2016		0.0%	17.0%	17.0%	24.0%	
1900	DEPARTMENT OF STATE	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/27/2016		0.0%	28.4%	28.4%	27.8%	
1400	DEPARTMENT OF THE INTERIOR	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/31/2016		0.0%	19.5%	19.5%	24.8%	
2000	DEPARTMENT OF THE TREASURY	55.0%	ITTs Assigned	Drafted	Full	Completed: 11/07/2016		0.0%	7.7%	7.7%	20.9%	
6900	DEPARTMENT OF TRANSPORTATION	40.0%		Drafted	Full	Completed: 10/31/2016		0.0%	20.3%	20.3%	20.1%	
3600	DEPARTMENT OF VETERANS AFFAIRS	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/31/2016		0.0%	15.4%	15.4%	23.5%	
1513	FEDERAL BUREAU OF INVESTIGATION	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/28/2016		0.0%	14.6%	14.6%	23.2%	
4700	GENERAL SERVICES ADMINISTRATION	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/24/2016		0.0%	14.4%	14.4%	23.1%	
1000	JUDICIARY	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/26/2016		0.0%	22.3%	22.3%	25.8%	
8000	NATIONAL AERONAUTICS AND SPACE ADMINISTRATION	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/31/2016		0.0%	4.1%	4.1%	19.7%	
2804	SOCIAL SECURITY ADMINISTRATION	55.0%	ITTs Assigned	Drafted	Full	Completed: 10/31/2016		0.0%	9.8%	9.8%	21.6%	

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Medium Agencies

EIS Transition Scorecard: Medium Agencies												
Date: 8/31/2017		Acquisition Planning					Acquisition Decision		Transition Execution		Overall % Complete	
AB Code	Agency	Acq Plan % Completion	ITT Assigned (ATS, TOCO, & LTM)	IAA Signed	TI Access	ATP Submitted	FO Solicitations Released	TOs Awarded	Transition 50% Complete (SIR PW % Disc)	Transition 100% Complete (SIR PW % Disc)	Overall % Complete	
Date Due			6/30/2016	5/31/2017	42674	10/31/2016	10/31/2017	10/31/2018	6/30/2019	3/31/2020		
9568	BROADCASTING BOARD OF GOVERNORS	✗ 20.0%	ITTs Assigned	Drafted	Full	Completed 08/07/2017		✗ 0.0%	✗ 22.7%	✗ 22.7%	✗ 14.2%	
9507	COMMODITY FUTURE S TRADING COMMISSION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 12/05/2016		✗ 0.0%	✗ 14.4%	✗ 14.4%	✗ 23.1%	
9559	CONSUMER FINANCIAL PROTECTION BUREAU	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/28/2016		✗ 0.0%	✓ 59.4%	✓ 59.4%	☹ 38.1%	
9100	DEPARTMENT OF EDUCATION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 11/08/2016		✗ 0.0%	✗ 18.3%	✗ 18.3%	✗ 24.4%	
8600	DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT	✓ 50.0%	ITTs Assigned	Drafted	Partial	Completed 11/01/2016		✗ 0.0%	✗ 11.9%	✗ 11.9%	✗ 20.6%	
6800	ENVIRONMENTAL PROTECTION AGENCY	✓ 50.0%	ITTs Assigned	Drafted	Partial	Completed 10/31/2016		✗ 0.0%	☹ 25.9%	☹ 25.9%	☹ 25.3%	
4500	EQUAL EMPLOYMENT OPPORTUNITY COMMISSION	✗ 20.0%	ITTs Assigned	Drafted	Full	Completed 08/04/2017		✗ 0.0%	✗ 19.8%	✗ 19.8%	✗ 13.3%	
1100	EXECUTIVE OFFICE OF THE PRESIDENT	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 03/14/2017		✗ 0.0%	✗ 11.6%	✗ 11.6%	✗ 22.2%	
7800	FARM CREDIT ADMINISTRATION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/31/2016		✗ 0.0%	☹ 41.0%	☹ 41.0%	☹ 32.0%	
2700	FEDERAL COMMUNICATIONS COMMISSION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 03/14/2017		✗ 0.0%	☹ 30.4%	☹ 30.4%	☹ 28.5%	
5100	FEDERAL DEPOSIT INSURANCE CORPORATION	✓ 50.0%	ITTs Assigned	Drafted	None	Completed 11/01/2016		✗ 0.0%	☹ 48.6%	☹ 48.6%	☹ 32.9%	
2600	FEDERAL RETIREMENT THRIFT INVESTMENT BOARD	✗ 15.0%	ITTs Assigned	Drafted	None			✗ 0.0%	✓ 64.4%	✓ 64.4%	☹ 26.5%	
0500	GOVERNMENT ACCOUNTABILITY OFFICE	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/31/2016		✗ 0.0%	✗ 22.4%	✗ 22.4%	☹ 25.8%	
8800	NATIONAL ARCHIVES AND RECORDS ADMINISTRATION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/31/2016		✗ 0.0%	✗ 12.1%	✗ 12.1%	✗ 22.4%	
6300	NATIONAL LABOR RELATIONS BOARD	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/31/2016		✗ 0.0%	✓ 53.9%	✓ 53.9%	☹ 36.3%	
4900	NATIONAL SCIENCE FOUNDATION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 11/17/2016		✗ 0.0%	✗ 13.1%	✗ 13.1%	✗ 22.7%	
3100	NUCLEAR REGULATORY COMMISSION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 09/30/2016		✗ 0.0%	✗ 16.0%	✗ 16.0%	✗ 23.7%	
2400	OFFICE OF PERSONNEL MANAGEMENT	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/31/2016		✗ 0.0%	✗ 12.8%	✗ 12.8%	✗ 22.6%	
1606	PENSION BENEFIT GUARANTY CORPORATION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/31/2016		✗ 0.0%	✓ 54.3%	✓ 54.3%	☹ 36.4%	
6000	RAILROAD RETIREMENT BOARD	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/31/2016		✗ 0.0%	✗ 12.9%	✗ 12.9%	✗ 22.6%	
5000	SECURITIES AND EXCHANGE COMMISSION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/03/2016		✗ 0.0%	✓ 61.8%	✓ 61.8%	☹ 38.9%	
7300	SMALL BUSINESS ADMINISTRATION	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 11/01/2016		✗ 0.0%	✗ 9.6%	✗ 9.6%	✗ 21.5%	
6400	TENNESSEE VALLEY AUTHORITY	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 10/31/2016		✗ 0.0%	✗ 8.2%	✗ 8.2%	✗ 21.1%	
1800	UNITED STATES POSTAL SERVICE	✗ 15.0%	ITTs Assigned	Drafted	Partial			✗ 0.0%	✗ 4.3%	✗ 4.3%	✗ 6.4%	
7200	US AGENCY FOR INTERNATIONAL DEVELOPMENT	✓ 55.0%	ITTs Assigned	Drafted	Full	Completed 01/19/2017		✗ 0.0%	☹ 32.4%	☹ 32.4%	☹ 29.1%	

Appendix E – Agency Transition Checklist

Agency Checklist Actions	Additional Details	☑	Target Date
Identify Transition points of contact	Agency Transition Sponsor	☐	May 2016
	Transition Ordering Contracting Officer (TOCO)		
	Lead Transition Manager		
Identify and contact GSA Agency Manager (AM)	gsa.gov/nspsupport	☐	May 2016
Receive IAA TAP Transition briefing	Coordinated by GSA AM	☐	May 2016
Complete Draft IAA	Indicates intent to use GSA provided consultant support	☐	May 2016
Request Access to GSA Tools	a. Transition Inventory Access: see Transition Inventory User Guide (gsa.gov/eistransition)	☐	Oct 2016
	b. Conexus – EIS Ordering, Billing, and Inventory Functionality (conexus.gsa.gov)		
	c. Subscribe to Interact for real-time notifications of EIS and transition activities (interact.gsa.gov/eis)		
Review and confirm agency's transition inventory	a. Identify who will review and confirm agency inventory	☐	Oct 2016
	b. Download agency inventory from TI		
	c. Review inventory		
	d. Identify discrepancies		
	e. Communicate discrepancies through TI application		
Review EIS RFP to become familiar with the available services, management and operations requirements, and pricing structure	FedBizOpps.gov; Ref. Solicitation No. QTA0015THA3003	☐	Oct 2016
Take available Training Courses (Ref. GSA TCC Training Plan)	a. EIS Fundamentals	☐	Jun 2016 – Post EIS Award
	b. Transition Inventory		
	c. All Agency Inventory		
	d. Fair Opportunity and Ordering Guide		
	e. Management and Operations		
	f. EIS Pricer		
	g. Introduction to Conexus		
	h. Telecommunications 101 and EIS Pricing and Structure		
	i. DPA Training		
Develop Agency Transition Plan (ATP)	a. Department level	☐	Oct 2016 (initial) update as appropriate
	b. Determine number of FO decisions and expected release dates and task order award dates		
	c. Define transition budget plan, dependencies, risks		
	d. State that inventory has been confirmed		
	e. Estimate human resource requirements and coordinate with agency staffing and training plans for FY 2016-2020		
	f. Complete ATP worksheet		
	g. Submit ATP and worksheet to eistcc.ta@gsa.gov mailbox		

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Agency Checklist Actions	Additional Details	☑	Target Date		
Finalize IAA for GSA consultant support	a. Identify agency IAA signatory	☐	As contacted by GSA		
	b. Identify a PM to monitor consultant's performance				
	c. Communicate number of FOs and type <ul style="list-style-type: none"> i. Complex: RFP, SOW ii. Simple: RFQ, Price Only 				
	d. Identify consultant clearance requirements (as applicable)				
	e. Finalize resource allocation needs and timing				
	f. Conduct kick-off meeting with GSA consultants <ul style="list-style-type: none"> i. Agency LTM, TOCO, and OCO for each FO Decision ii. GSA Agency Manager/Technology Service Manager iii. Consultant support iv. TCC 				
	g. Participate in Quarterly IAA reviews (recurring)				
	a. Identify the OCO for each FO Decision				
	b. Each OCO completes DPA training on DAU (FAC066)				
	c. Request DPA using Request Form (hyperlink to form available on www.gsa.gov/eis)				
d. Email EIS DPA training completion certificate to EIS_DPA@gsa.gov	☐	Aug 2017			
e. Receive official DPA letter from GSA EIS CO authorizing OCO to issue task orders on EIS					
a. Develop schedule for completing FOs					
b. Define Service Requirements <ul style="list-style-type: none"> i. Define Service Groups ii. Document requirements within a SOW, PWS, or SOO 					
c. Develop Acquisition Strategy <ul style="list-style-type: none"> i. Select Acquisition Strategy <ul style="list-style-type: none"> 1. Price-only 2. Low Price Technically Acceptable (LPTA) 3. Best Value Tradeoff ii. Prepare Acquisition Plan 					
d. Draft Solicitation and the complete Acquisition Package (driven by acquisition method) <ul style="list-style-type: none"> i. Map Agency Service Locations to Core Based Statistical Areas (CBSAs) ii. Add Service Inventory as an attachment to SOW/PWS/SOO 	☐	Jan 2017–Jul 2017			
Develop Fair Opportunity (FO) Solicitations (see Fair Opportunity and Ordering Guide on gsa.gov/eistransition)					
Update Draft Solicitation to reflect changes consistent with awarded contracts					
Submit Solicitation(s) to GSA for In-Scope Review <ul style="list-style-type: none"> a. GSA conducts review to ensure solicitation is within scope of the EIS contracts b. GSA may request requirement(s) to be redefined 					
Release FO solicitations to EIS Contractors					
Update ATP and provide to GSA					
Conduct FO Decision			a. Evaluate Offers from EIS Contractors	☐	Oct 2017-Oct 2018; in parallel with BSS Testing
			b. Document Findings		
			c. Select Contractor(s)		
			d. Notify Unsuccessful Offerors		
	e. Modify EIS Contract, if required				
	f. Debrief, as applicable				

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Agency Checklist Actions	Additional Details	☑	Target Date
Business Support Systems (BSS) testing (EIS Contractors)	a. GSA tests each EIS contractor's BSS in accordance with BSS functional requirements and security testing for GSA FISMA A&A	<input type="checkbox"/>	Post EIS Award; in parallel with the FO process
	b. Optional: Agency conducts its own A&A		
Receive notification of successful BSS testing and FISMA A&A (EIS Contractors)	Issued by GSA CO	<input type="checkbox"/>	Post EIS Award
Agency OCO Awards EIS Task Order(s)		<input type="checkbox"/>	Oct 2018
Issue Service Orders (SOs) with EIS contractor	a. Determine need for parallel operations of current service and replacement service	<input type="checkbox"/>	ASAP after Task Order award
	b. Coordinate with Local Government Contacts for site preparation and access		
	c. Identify service-order specific info such as Local Government Contacts, installation or activation dates, coordination with other vendors		
	d. Identify all the CLINs		
	e. Agency notifies the contractor the format (MS Word, Excel, etc.) in which it wants to receive order acknowledgments and notices		
	f. Identify test and acceptance criteria for SOs		
Establish accounts within the contractor's systems		<input type="checkbox"/>	ASAP after Task Order award
Implement EIS service orders with EIS Contractor	a. Receive Service Order Acknowledgement (SOA) within one business day of SO receipt	<input type="checkbox"/>	Within Provisioning SLAs
	b. Receive Service Order Rejection Notice (SORN) or Service Order Confirmation (SOC) within five business days of SO receipt		
	c. Receive a Firm Order Commitment (FOC) date		
	d. Receive Service Order Completion Notice (SOCN) upon successful completion of installation and testing		
	e. Receive Other Notifications for administrative and service state changes as applicable		
Issue disconnects for current services on expiring contracts		<input type="checkbox"/>	ASAP after replacement service is accepted
Transition Achievement Milestone: 50% Disconnected		<input type="checkbox"/>	Jun 2019

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Agency Checklist Actions	Additional Details	☑	Target Date
Transition Complete: 100% Disconnected	Agencies should plan to complete their transition by March 2020. Some agencies will have challenges completing by that timeframe. The Networx contracts have a 365-day continuity of service period that allows for services to continue to operate at the last year of contract pricing which would allow services to continue to March/May 2021. However, caution is important when considering the continuity of service period. A continuity of service period is exercised on an already-expired contract. Once this period ends, there is NO opportunity to extend the contract or services.	☐	Mar/May 2020