

STATEMENT OF OBJECTIVES TEMPLATE FOR CLOUD MIGRATION SERVICES: INVENTORY, APPLICATION MAPPING, AND MIGRATION PLANNING

EXECUTIVE SUMMARY

What is a SOO?

A Statement of Objectives (SOO) is a government prepared document incorporated into the Request for Proposal (RFP) that states the overall solicitation objectives.¹ It is often provided in lieu of a Statement of Work (SOW),² or instructs the offeror to create a SOW or Performance Work Statement (PWS) to address the objectives stated in the SOO.

What is In a SOO?

The SOO should provide the basic, top level objectives of the acquisition.³ From the Federal Acquisition Regulation (FAR), a SOO should contain at minimum: Purpose; Scope; Period and Place of Performance; Background; Performance Objectives (i.e. required results); and any operating constraints.⁴

Why a SOO?

A SOO shifts the responsibility for preparing the SOW from the government to the solicitation respondents.⁵ It can be used in those solicitations where the intent is to provide the maximum flexibility to each offeror to propose an innovative development approach.

How Can I Use This SOO Template?

This SOO template is used to create an acquisition-specific SOO to procure cloud migration services. This particular SOO template encompasses considerations for the first three cloud migration stages: 1.) Inventory 2.) Application Mapping and 3.) Migration Planning.⁶ This SOO template can be tailored to the cloud migration services that your agency needs. Text written in red can be tailored (edited or deleted) to fit the needs of your Agency. For example, if you only are looking to procure Migration Planning services, delete all of the red text associated with 'Inventory' or 'Application Mapping' phases.

¹ [SOO Preparation Guide and Example from Dept. of the Navy](#)

² [SOO Preparation Guide from the Air Force](#) (cited on www.acquisition.gov)

³ [Handbook for Preparation of Statement of Work \(SOW\) from the Department of Defense \(DoD\)](#) (cited on www.acquisition.gov)

⁴ [Federal Acquisition Regulation – Subpart 37.6 – Performance Based Acquisition \(37.602 – Performance Work Statement\)](#)

⁵ [Department of Defense – Handbook for Preparation of Statement of Work \(SOW\)](#)

⁶ Based on the FDCCI Data Center Consolidation Approach phases, tailored to Cloud Migration needs

What Documents Were Used as Sources or Used to Create This SOO Template?

The following documents were either leveraged to create this SOO Template or are good resources for further exploration.

- “Comprehensive Inventory of Agency IT Assets, Users and Processes” – Template of Questions Produced by Alliant Shared Interest Group (SIG), February 2012.
- “Creating Effective Cloud Contracts for the Federal Government: Best Practices for Acquiring IT as a Service” – Joint publication of the CIO Council and the Chief Acquisition Officers Council, February 24, 2012. ([Link](#))
- “Infrastructure-as-a-Service BPA Sample Statement of Objectives” – Posted on Info.apps.gov, May 2011. ([Link](#))
- “GSA Statement of Objectives for Enterprise E-Mail and Collaboration Services” – SOO posted on www.gsa.gov for RFP #OCIO-14558, June 2010. ([Link](#))
- “Office of the Comptroller of the Currency Statement of Objectives, Data Center Professional Services” – Draft SOO posted on FBO.gov, February 2010. ([Link](#))
- “DOI Statement of Objectives for Cloud Email and Collaboration Services,” – SOO posted on FBO.gov for RFP D12PS00041, Feb. 19, 2012. ([Link](#))
- “Data Center Consolidation Initiative Agency Consolidation Plan Template” – Posted on CIO.gov, February 2010. ([Link](#))