[Insert Your Department Name]  
[Insert Your Agency Name]

**STATEMENT OF WORK (SOW)**

**Email-as-a-Service (EaaS)  
Blanket Purchase Agreement (BPA)** **# QTA011GNB0010** **XX 2012**

**SAMPLE**

**Version 0.2**

# Document Overview

A Statement of Work (SOW) includes explicit direction for the contractor to follow and is typically used when the task is well-known and can be described in specific terms. A SOW may also contain references to desired performance outcomes, performance standards, and metrics, which is a preferred approach.

This sample Email as a Service (EaaS) Blanket Purchase Agreement (BPA) Statement of Work (SOW) template is informational only and the use of this template is not required.

This template can simply be used as a reference document for purposes of outlining your own SOW and for ensuring that the information listed in this template is provided in your own SOW.   
  
Note: Guidance in this template is presented in italics within square brackets [guidance], while example content is presented in normal font.

Please delete all guidance when finalizing the SOW.

All sections should be reviewed for relevance to the cloud-based objectives of the ordering activity and modified accordingly.

This sample is not all inclusive, therefore the reader is cautioned to use professional judgment and include agency specific references to their own SOW.

If you have questions regarding the EaaS BPA please reach out to the EaaS Service Line Manager listed below.

EaaS Service Line Manager

## Tom Kireilis

10304 Eaton Place

Fairfax, Virginia 22030

Phone: (703) 589-2925

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Table of Contents

[Document Overview 2](#_Toc345319618)

[1. Task Order Title 5](#_Toc345319620)

[2. Introduction 5](#_Toc345319621)

[3. Background 5](#_Toc345319622)

[4. Current Environment 6](#_Toc345319623)

[5. Objectives 7](#_Toc345319624)

[5.1. Business Objectives 7](#_Toc345319625)

[5.2. Technical Objectives 8](#_Toc345319626)

[5.3. Service Objectives 8](#_Toc345319627)

[5.4. Security Objectives 8](#_Toc345319628)

[5.5. Management & Administrative Objectives 8](#_Toc345319629)

[5.6. Migration Objectives 8](#_Toc345319630)

[5.7. Integration Objectives 8](#_Toc345319631)

[5.8. Solution-specific Objectives 8](#_Toc345319632)

[6. Scope 8](#_Toc345319633)

[7. Specific Requirements 9](#_Toc345319634)

[7.1. Task Description 9](#_Toc345319635)

[7.2. Key Deliverables, Milestones and Schedule 12](#_Toc345319636)

[7.3. Government Furnished Equipment/Information (GFE/GFI) 12](#_Toc345319637)

[7.4. Other Pertinent Information/Special Considerations 13](#_Toc345319638)

[8. Constraints 13](#_Toc345319639)

[8.1. Access Control 13](#_Toc345319640)

[8.2. Authentication 13](#_Toc345319641)

[8.3. Personnel Security Clearances 14](#_Toc345319642)

[8.4. Non-Disclosure Agreements (NDAs) 14](#_Toc345319643)

[8.5. Accessibility 14](#_Toc345319644)

[8.6. Data 14](#_Toc345319645)

[8.7. Confidentiality, Security, and Privacy 14](#_Toc345319646)

[8.8. Privacy Act 14](#_Toc345319647)

[9. Contract Type 14](#_Toc345319648)

[10. Period of Performance 14](#_Toc345319649)

[11. Place of Performance 15](#_Toc345319650)

[12. Points of Contact 15](#_Toc345319651)

[APPENDIX A: REFERENCES 16](#_Toc345319652)

[APPENDIX B: GLOSSARY OF TERMS 17](#_Toc345319653)

[APPENDIX C: ACRONYMS 18](#_Toc345319654)

Table of Tables

[Table 1: [Department/Agency] Email Environment 6](#_Toc338671122)

[Table 2: Scope of Services 9](#_Toc338671123)

# Task Order Title

[Include a short title of services and/or a general description of items to be acquired.   This title should be unique and descriptive, and should be used consistently throughout the task order process.]

# Introduction

[Provide a short description of the requirements without including the specific requirements.]

The [Department/Agency] is pursuing the acquisition of email and collaboration services as Software as a Service (SaaS) from a commercial provider of Cloud Computing services and software. The primary goal of this acquisition is to provide the solution and services necessary for [Department/Agency] to transition email to the cloud which will result in improvements in efficiency, agility, innovation, and potential cost savings. The government believes that traditional outsourcing and system integration support is insufficiently adaptive and costly and should be replaced by commodity services with a SaaS Cloud Computing offering.

The new email and collaboration system will meet industry performance standards, offer the necessary redundancy and contingency features to meet [Department/Agency] needs, and provide state-of-the-art technology enhancements to improve user experience and minimize service disruption.

This Statement of Work (SOW) issued by [Department/Agency] describes the goals expected to be achieved with regard to executing the transition of enterprise email applications to the cloud and operation of the new email service via a cloud Email as a Service (EaaS) solution.

# Background

[Consider the following: Include high–level Agency/Department specific background, how the requirement evolved; relationship to other projects; why work is needed, the outcomes of any market research conducted by your organization to determine the viability and cost of different options for an email solution. Summarize information which is essential for understanding the work and ensure technical information is understandable to potential readers of different disciplines.]

Produced by the Office of Management & Budget (OMB), the February 2011 Federal Cloud Strategy outlines the impetus and benefits of migrating to cloud services, including acceleration of data center consolidation and better utilization of existing infrastructure assets. Based on the December 2010 25 Point Plan to reform Federal Information Technology Management, also from OMB, each Federal agency CIO has been directed to leverage this strategy to begin planning the migration of their IT services to cloud solutions. [Department/Agency] recognizes the importance of harnessing these fundamental shifts in IT investment patterns to increase IT efficiencies and cut IT costs.

EaaS has demonstrated benefits for both industry and government organizations including reducing costs per user per month, scalability to the enterprise using bill-by-the-mailbox pricing concepts, reduced burden of lengthy software upgrades, and reduced complexity through vendor-provided equipment and services.

# Current Environment

[Provide a brief, high-level description of your organization’s current environment. Examples of current environment factors are listed below]:

* [Include Strategic operations and/or organization mission and objectives]
* [Provide description of your IT organization, infrastructure, etc.]
* [Discuss your current cloud initiatives and strategy]
* [Organizational and/or budget constraints]
* [Related programs that could impact cloud migration (e.g. refresh schedules, large acquisitions)]

The existing email and collaboration infrastructures at [Department/Agency] are not adequate for the future.

[Identify any high level descriptors of the issues that current email and collaboration solutions are causing].

The main drivers of this effort for [Department/Agency] to utilize a cloud solution for enterprise email applications are:

* [Identify agency-specific drivers of the cloud email migration]

[Department/Agency] current uses [current email system/solution], across [X] users and [X] locations.

Table 1 outlines the user base across [locations, components, or other criteria] and identifies other existing parameters for the current email environment.

[Identify any user base growth patterns/projections, such as total expected mailboxes over a given growth period].

Table 1: [Department/Agency] Email Environment

| Environment | [Agency/Department] |
| --- | --- |
| User Base |  |
| [Component 1] | # of Users for Component |
| [Component 2] | # of Users for Component |
| [Component 3] | # of Users for Component |
| Total Number of Users | # of Users (Total) |
| Mailbox Type |  |
| User Mailboxes | # |
| Resources (Room/Equipment) | # |
| Email Mailboxes | # = User Mailboxes + Resources |
| Mailbox Size | # (GB) |
| Current Email Systems |  |
| [Current Email System 1 or licenses], including version | Short description |
| [Current Email System 2 or licenses], including version | Short description |
| Other Systems/Tools Related to Email |  |
| [List any other collaboration, office automation, or records managements solutions used in conjunction with the Email System(s)] |  |
| Mobile Users |  |
| [Mobile Phone Type] | # |
| [Mobile Phone Type] | # |
| Browsers Used |  |
| Internet Explorer |  |
| Firefox |  |
| Chrome |  |
| Safari |  |
| Other |  |
| Applications for Integration |  |
| [Identify any applications that will be integrated with the target Email solution as part of the services offered under the BPA, as well as any defining characteristics of the applications, including version] | Short description |

# Objectives

[Provide a concise overview of your Agency/Department goals and expectations as a result of this task order. It does not need to include a description of deliverables or requirements since these will be included in the “Specific Requirements” section below. Include the desired end result and your expectations or goals of the contractor.]

The objective of this SOW is to acquire the EaaS solution [specify the desired EaaS lots (service offerings) and sub-lots (deployment models)] via the GSA EaaS BPA.

In line with the requirements in the EaaS BPA, [Department/Agency] has outlined objectives that the proposed EaaS solution will achieve, including business, technical, security, management/administrative, migration, and integration objectives.

## Business Objectives

[Department/Agency] is seeking an integrated suite of cloud-based email and collaboration services that improves business performance, increases employee productivity, achieves cost savings, and fosters greater collaboration by providing [Department/Agency] with expanded and new capabilities that reflect industry best practices.

## Technical Objectives

The EaaS solution shall achieve the technical objectives to achieve a high degree of confidentiality, integrity, reliability and availability in accordance with the GSA EaaS BPA.

## Service Objectives

The EaaS solution shall offer the necessary redundancy, resiliency, and contingency capabilities to ensure service availability that meets [Department/Agency’s] current and future needs in accordance with the GSA EaaS BPA.

## Security Objectives

The EaaS solution shall meet the requisite FedRAMP security controls and requirements in accordance with the GSA EaaS BPA.

## Management & Administrative Objectives

The EaaS solution shall deliver cost effective, responsive, and efficient management and customer support as specified in the EaaS BPA.

## Migration Objectives

The EaaS solution shall enable the [Department/Agency] to conduct a seamless and expedited transition from the current email and collaboration environment to the cloud email and collaboration services with minimal disruption to business operations while insuring data integrity.

## Integration Objectives

The EaaS solution shall provide necessary integration services to extend the EaaS solution to related applications, in accordance with the EaaS BPA.

## Solution-specific Objectives

The following objectives apply to the solution identified by [Department/Agency] as ideally fitting the requirements of the organization:

[Include any objectives that are solely applicable to the solution desired to be implemented (e.g. which commercial software product desired to be used) that are not addressed elsewhere in this document]

# Scope

[Describe general scope of work. Include a brief description of: Size of the anticipated effort; summary of actions to be performed; results expected; and/or special areas of interest.]

The EaaS Blanket Purchase Agreement (BPA), numbered QTA011GNB0010, issued by the General Services Administration (GSA) for Email as a Service (EaaS) from Schedule 70 in accordance with SmartBUY is hereby incorporated by reference.

The scope of this SOW is to identify the applicable services, deployment model(s), and agency-specific needs in support of awarding a Task Order based on the requirements identified in the EaaS BPA.

Table 2 outlines the scope of services across the service offerings, delivery models, and pricing options for the EaaS solution.

[Information provided in Table 2 should align to the information outlined in Table 1 in this document. For example, if Integration Services will be part of the scope, identify the applications and defining characteristics that will be integrated with the target Email solution.]

Table 2: Scope of Services

| Service Offerings | Delivery Model(s) | Type of Pricing |
| --- | --- | --- |
| [Email as a Service]  [Office Automation]  [Records Management]  [Migration Services]  [Integration Services] | [Government Community Cloud]  [Provider Furnished Private Cloud]  [Secret Enclave]  [Public Cloud] | [U.S. Based Pricing]  [Non-U.S. Based Pricing] |

The scope of the EaaS Solution will apply to the following components of [Agency/Department]:

[Component 1]

[Component 2]

[Component 3 …. and more as applicable]

[If applicable, identify which service offerings are not included in the scope of this SOW. If any Agency/Department component(s) require EaaS services under the BPA that vary from the core service listed above, identify the component(s) and the additional services required, including the Service Offering, Delivery Model, and Type of Pricing. For those services or requirements that may exceed the baseline service offerings available under the EaaS BPA, identify any services or requirements that will need to be provided through supplemental Schedule 70 services.]

# Specific Requirements

[Provide a performance-based narrative of the specific tasks, services and/or deliverables that make up the SOW.  Number the tasks sequentially, e.g. Task 1 and narrative, Task 2 and narrative, etc.]

## Task Description

[Include deployment model/Lot number. The sample tasks below were split into one task per service offering simply for clarity of presentation. Multiple service offerings may be combined into a single task as appropriate resulting in one task per component or other logical grouping suitable to the ordering activity.]

### Task 1 – Cloud Email

* [Provide cloud email services for the deployment model and pricing type indicated above for a total of [xxx – As derived from Table 1] mailboxes].
* [Provide a total aggregate of [xxx – as derived from Table 1] GB of mailbox storage for those mailboxes. Although the BPA specified a minimum of 5 GB storage per mailbox, some vendors provide additional amounts of base storage per mailbox. Vendors therefore may or may not need to provide costs against the additional storage CLIN based on your overall requirements.]
* [Provide email archiving services for a total of [xxx – As derived from Table 1] mailboxes].
* [Provide a total aggregate of [xxx – as derived from Table 1] GB of archiving storage].
* [Provide Blackberry Enterprise Server services for a total of [xxx – As derived from Table 1] mailboxes.]
* [Provide the following functional capabilities that are identified in the BPA as optional requirements:]
  + [Provide integration to the vendor trouble ticket system through web service supported Application Program Interface (API).]
  + [Support an end-user’s ability to request a read receipt upon sending an email message.]
  + [Support the transmitting of a read receipt to the sender upon an end-user’s reading of an email message.]
  + [Allow the end-user(s) designated as the group mailbox owner to manage the end-users with access to the group mailbox.]
  + [Support time constrained email delegation capabilities. For instance, an end user could appoint a personal assistant delegation privileges for a specific period of time.]
  + [Provide the end user with the option to create and edit email in a pop-up window.]
  + [Allow the end-user to designate contacts as shared with other end users.]
  + [Support time constrained calendar delegation capabilities. For instance, an end user could appoint a personal assistant delegation privileges for a specific period of time.]
  + [Provide additional support for other mobile device integration through dedicated mobile web site. Specify the functionality required.]
  + [Provide end users with a local client application allowing offline access to cached email. Specify functional requirements of the local client application. The local client application shall not be necessary to perform any function offered by the solution.]

### Task 2 – Office Automation

* [Provide office automation services for the deployment model and pricing type indicated above for a total of [xxx – As derived from Table 1] users.

The following office automation services must be supported:]

* + [Collaborative document-authoring capabilities for end-users and authorized external audiences including word processing documents, spreadsheets, and presentations.]
  + [Creation of intranet websites including the ability to create user content, serve as document repository and track document history, and create wiki pages.]
  + [Provide common API’s allowing integration with third party tools.]
* [Provide the following Office Automation functional capabilities that are identified in the BPA as optional requirements:]
  + [Web conference capabilities that allow end-users to share content or desktops online with a web audience.]
  + [Video chat capabilities allowing end-users to communicate through a webcam and headset with other system users.]
  + [Unified Communication services that allow integration with Department/Agency Voice-Over-Internet-Protocol (VOIP) telephone systems.]
  + [Capabilities for end-users to send SMS (Short Messaging Service) messages.]
  + [Provide ability for end-users to transmit and receive faxes from the messaging system.]
  + [Any other office automation tasks beyond those provided as required or optional within the BPA.]
* [Provide a total aggregate of [xxx] GB of storage for office automation purposes for those users.]

### Task 3 – Records Management

* [Provide records management services for the deployment model and pricing type indicated above for a total of [xxx] users.]
* [Provide a total aggregate of [xxx] GB of storage for records management purposes for those users.]
* [Any Agency/Department-specific records management requirements that are beyond the scope of the requirements in the BPA.]

### Task 4 – Migration Services

* [Provide email migration services for [xxx] users at the Executive Migration Service level for the deployment models and pricing type indicated above.]
* [Provide email migration services for [xxx] users at the Standard Migration Service level for the deployment model and pricing type indicated above.]

### Task 5 – Integration Services

* [Provide details, per integration desired, on the functionality of the desired interface documenting the source and target systems including all events, inputs, outputs, and their formats so that vendors can determine realistic levels of effort. Integration services are software and systems development activities and specific best practice guidance on this topic is beyond the scope of this template.]

## Key Deliverables, Milestones and Schedule

[Describe precisely the items to be delivered, both during the period of performance and at completion of the task order.  Deliverables should be referenced back to their requirement in the Specific Requirements section. Describe the schedule either in terms of calendar days from the date of Task Order award or in calendar days when other projects or program elements are dependent on the delivery.]

## Government Furnished Equipment/Information (GFE/GFI)

[Ordering Agency/Department should identify if any GFE and/or GFI will be provided to the contractor.  If the list of property is extensive, this section should identify where that list can be found. Before offering to provide any property, make sure that it will be available when required, where required, and in the condition required by the contract. Specific requirements about providing government furnished property can be found in FAR 45, government property, and related agency policy. For additional details, refer Section D.19 of the EaaS Conformed BPA]

* The contractor shall be furnished current task pertinent information, and other documentation or materials as required for conducting the tasks described hereunder.
* For the purposes of migrating existing systems to the contractor provided systems and as necessary for the implementation of requested implementations, the contractor shall have full access to GFE and software to perform the duties on the project while performing duties in government space.
* All Government Furnished Property referred to in this clause will remain the property of the Government, or its contractor, and under that entity’s control at all times. The Government retains the right to withdraw or reallocate these resources at any time, and without notice, during the performance of this contract.

## Other Pertinent Information/Special Considerations

[Include any special considerations or unique requirements necessary to accomplish the task order and/or any additional information that will be helpful in determining reasonable approaches and cost estimates for the task order.

### As appropriate, this section should contain:

* Identification of potential Conflicts of Interest (COI’s) that may influence which contractors should be awarded the task order.
* Contractor Travel - Describe any local or long distance travel the contractor will have to perform to execute the task order. Identify the “to/from” locations of the travel, numbers and duration of the trip.]

# Constraints

[This section lists laws, rules, regulations, standards, technology limitations and other constraints that the service and/or service provider must adhere to or work under.   
Include any constraints not previously mentioned in other sections of this document, potentially to include:]

## Access Control

[E.g. integration of user access to Active Directory or other access control requirements]

* The e-mail system shall allow the [Agency/Department] administrators remote administration of end-user account provisioning, de-provisioning and access privileges through a web browser interface.
* The e-mail system shall allow the [Agency/Department] administrators to allow end-user access through the use of username and password if an administrator determines that the end user cannot utilize the Agency’s multi-factor identification.
* The e-mail system shall provide the end users the ability reset their own passwords.

## Authentication

[E.g. identification of specific authentication requirements NOT identified in the Technical Objectives]

* The e-mail system shall support integration with [Agency/Department’s] directory services supporting an integrated authentication and authorization model (single sign on) utilizing the e-Government profile for Security Assertion Markup Language 2.0 (SAML 2.0).
* The e-mail system shall support dual factor authentication including support for PKI certificates from a smartcard/CAC. It is envisioned that in the future all users will authenticate with the PKI and use the Identity, Credentials, and Access Management (ICAM) access card; for the present some users will continue to be authenticated by user name and password, and this method must also be supported. Furthermore e-mail encryption and signing shall use the existing agency PKI.

## Personnel Security Clearances

[Constraints for personnel security clearances, in alignment with the requirements in the EaaS BPA regarding security clearances required for each delivery model]

## Non-Disclosure Agreements (NDAs)

[E.g. identification of any NDAs to be signed by personnel based on duties or access to information]

## Accessibility

[Constraints for accessibility in alignment with the 508 Compliance requirements outlined in the EaaS BPA]

## Data

[Any constraints on the use and/or ownership of data, potentially including the identification of data that will remain the property of the government]

## Confidentiality, Security, and Privacy

[Identify any constraints on the privacy/security safeguards that have not already been identified elsewhere in this document]

## Privacy Act

[Include this section if the anticipated work requires the responder personnel to have access to Agency/Department’s Privacy Information.]

Responder personnel shall adhere to the Privacy Act, Title 5 of the U.S. Code, Section 552a and applicable agency rules and regulations as specified in the EaaS BPA.

# Contract Type

[The ordering Agency/Department may acquire deliverables and services on a firm-fixed unit price basis in the individual task orders.]

# Period of Performance

[Please indicate the length of the task order i.e. start date and end date. State if the task order is to be awarded with a base period and options.  If the task order is to be awarded and funded incrementally, state the base obligation period and incremental funding periods.

* The term for each Order placed under the BPA shall be specified by the ordering Agency/Department in the individual Order.
* Under no circumstances may an Order be placed under the BPA if the BPA has expired, or has been terminated or cancelled by the Government.
* No Orders may extend more than five (5) years after the expiration of the BPA. Order options, if included at initial issuance of the Order, may be exercised after the expiration date of the BPA.
* Notwithstanding anything to the contrary above, a multi-year Order placed under the BPA must be consistent with FAR Subpart 17.1 and any applicable funding restrictions.]

The Period of Performance will be from [X date to X date].

# Place of Performance

[Place of performance is determined by the ordering Agency/Department at the task order level]

All hosted email, collaboration and related services will be provided at the vendor’s locations [either U.S. Based or Worldwide], and all Migration and Integration efforts [will be performed on site at the Agency/Department location].

# Points of Contact

[Include the name, address and contact information of the Ordering Agency/Department Contracting Officer and Alternate Contracting Officer]

Contracting Officer (CO)   
Name:   
Address:  
Email:  
Phone Number:

Contracting Officer’s Representative (COR)  
Name:  
Address:  
Email:  
Phone Number:

# APPENDIX A: REFERENCES

[Optional]

[Include list of reference documents]

# APPENDIX B: GLOSSARY OF TERMS

[Optional]

[Include table for glossary of terms used in this document]

# APPENDIX C: ACRONYMS

[Optional]

[Include table for glossary of terms used in this document]