STATEMENT OF OBJECTIVES (SOO)

Orchestrated Transformation

Enterprise Performance Management, Process Intelligence, Transformation Services, Data Strategy, Emerging Technology, and Undelivered Orders Capability

1. Purpose

The purpose of this Statement of Objectives (SOO) is to define the Government's high-level objectives for acquiring Orchestrated Transformation Services to advance enterprise innovation, operational maturity, data-driven decision-making, and financial stewardship across the Department of Commerce (DOC).

The DOC Orchestrated Transformation effort is intended to build on the Business Applications Solution (BAS) investment by improving how the Department operates across financial management, acquisition, property, data, reporting, and shared service delivery. The effort will support the implementation and optimization of Enterprise Performance Management (EPM), Process Intelligence, Undelivered Orders (UDO) capabilities, Data Strategy and Data Catalog services, Emerging Technology, and Transformation Services to support modernization, visibility, and operational efficiency improvements across the enterprise.

This transformation supports DOC's vision and advances strategic goals. Transformation must produce measurable organizational outcomes, not just completed deliverables.

Vision:

Deliver a unified resource management ecosystem that is innovative, effective, efficient, reliable, and compliant providing insights that enable Commerce's mission success.

Goals:

- **Budget:** Implement standardized, automated tools that provide leadership with data-driven decision support.
- **Data:** Deliver integrated, reliable, standardized, and accessible data that supports automation and operational efficiency.
- **Workforce:** Build a Center of Excellence to strengthen workforce capabilities through training, analytics, emerging technologies, and data literacy.
- **Resource Optimization:** Realize resource optimization by advancing the strategic investment of the BAS Ecosystem across the Department.

- **Shared Service Delivery:** Design, implement, and a mature shared services delivery through a Centers of Excellence model.

This SOO communicates the Government's desired outcomes and enables offerors to propose innovative, cost-effective, and performance-based solutions. Consistent with SOO-based acquisition methodology, this document defines objectives and desired outcomes; it does not prescribe specific technical solutions, labor categories, staffing models, or detailed implementation approaches. Offerors are expected to propose the best approach to achieving the Government's objectives.

2. Scope / Mission

The Government seeks a comprehensive suite of transformation services and technology capabilities that improve organizational performance, increase executive visibility, reduce manual effort, mature data governance, and support measurable operational improvements across the BAS ecosystem.

The scope includes the following major capability areas:

- Implementation and optimization of an integrated EPM capability.
- Deployment of Process Intelligence capabilities that identify, analyze, monitor, and improve end-to-end processes.
- Transformation services, including roadmap development, operating model support, change management, training, implementation support, adoption enablement, and operational governance.
- Implementation of a UDO capability to track and monitor UDOs leveraging emerging technology.
- Advancing the use of the Enterprise Data Warehouse (EDW) through a comprehensive Data Strategy, Data Catalog, data governance support, and analytics enablement.
- Use of emerging technologies, including artificial intelligence, automation, process mining, intelligent workflow, natural language querying, and other innovation pilots where appropriate and approved by the Government.

3. Preferred SaaS Capabilities and Equivalent Solutions

The Government has identified preferred SaaS capabilities and technology directions that may support the objectives of this SOO. However, the Government remains open to equivalent or superior SaaS solutions that meet the Department's functional, technical, security, data, integration, operational, and governance requirements.

Offerors may propose the Government-identified preferred SaaS products, equivalent SaaS products, or an integrated solution architecture that best achieves the outcomes defined in this

SOO. Any proposed alternative solution must clearly demonstrate how it meets or exceeds the salient characteristics, integration needs, security requirements, data governance expectations, reporting needs, workflow capabilities, scalability requirements, auditability requirements, and sustainment objectives required by the Government.

Offerors shall identify any assumptions, dependencies, licensing considerations, integration constraints, data migration or data access requirements, Authority to Operate considerations, FedRAMP status, implementation risks, transition considerations, and sustainment implications associated with their proposed SaaS solution.

The Government will evaluate proposed solutions based on their ability to achieve the required outcomes, align with the BAS ecosystem, minimize operational disruption, protect production stability, support auditability and compliance, enable data portability, and provide measurable value to the Department.

4. Period and Place of Performance

Period: One (1) year plus four (4) option years
Place: Gaithersburg, MD and/or Washington, D.C. with approved hybrid and remote support as authorized by the Government.

5. Background

DOC is completing the third and final phase of the BAS IT modernization in October 2026. The BAS IT modernization focused on implementing an integrated Enterprise Resource Planning (ERP) environment using Oracle E-Business Suite (EBS), Unison, PRISM, Sunflower, the Enterprise Data Warehouse, and related interfaces to support financial management, acquisition, property management, reporting, and enterprise data needs across DOC bureaus.

To further realize the return on invest in BAS, DOC seeks to advance the next stage of modernization by improving enterprise performance management, data strategy, process visibility, resource optimization, and operational decision support.

The current operational environment continues to rely on manual processes, fragmented reporting, inconsistent data definitions, and siloed operational insights. These conditions reduce agility, limit executive visibility, increase reconciliation burden, and constrain the Department’s ability to proactively manage performance, risk, budget execution, undelivered orders, and enterprise shared service outcomes.

DOC seeks to establish a modernized performance-management and transformation ecosystem that provides greater automation, integrated analytics, real-time insights, improved process transparency, standardized processes, and measurable operational outcomes.

6. Performance Objectives

6.1. Enterprise Performance Management (EPM)

The desired outcome is an integrated Software-as-a-Service (SaaS) EPM capability, using the Government's preferred platform or an equivalent solution, that supports planning, budgeting, forecasting, consolidation, reporting, controlled workflows, executive decision support, auditability, and integration with the BAS ecosystem.

The EPM capability should support the Department in achieving the following outcomes:

- Improve enterprise planning, budgeting, forecasting, consolidation, and financial reporting.
- Automate the financial close by extracting, standardizing, and reconciling data from multiple applications.
- Provide real-time performance dashboards and generate regulatory-compliant reports.
- Enable controlled workflows, approval routing, version control, and auditability of planning and reporting activities.
- Support labor forecasting, cost modeling, scenario planning, and resource optimization.
- Improve leadership visibility into financial performance, budget execution, resource needs, and enterprise risk areas.
- Reduce reliance on manual spreadsheets and fragmented reporting processes.

6.2. Process Intelligence

The desired outcome is an enterprise SaaS-based Process Intelligence capability, using the Government's preferred platform or an equivalent solution, that enables DOC to ingest relevant BAS ecosystem data, map and monitor end-to-end processes, identify bottlenecks and control gaps, and provide actionable insights for process improvement, compliance, and operational performance management.

The Process Intelligence capability should support the Department in achieving the following outcomes:

- Establish baseline process performance and maturity assessments across selected BAS business processes.
- Ingest and analyze data from core BAS solutions, including Oracle E-Business Suite, Unison PRISM, Sunflower, and the Enterprise Data Warehouse.
- Use process mining and process intelligence capabilities to capture, map, model, and monitor end-to-end processes.
- Identify process bottlenecks, inefficiencies, risks, control gaps, compliance concerns, and opportunities for standardization.

- Provide dashboards and analytics that show real-time operational performance, cycle times, exceptions, rework, and process variation.
- Support continuous improvement, shared service maturity, and targeted business process optimization.
- Provide actionable recommendations that can be evaluated through the appropriate BAS governance process.

6.3. Transformation Services

The desired outcome is a coordinated transformation capability that enables DOC to move from implementation completion to sustained modernization, shared service maturity, and measurable business value.

Transformation services should support the Department in achieving the following outcomes:

- Support the achievement of Strategic Vision, Goals and associated transformation Actions.
- Develop and maintain a transformation roadmap that identifies future-state outcomes, milestones, dependencies, risks, governance considerations, and change-management strategies.
- Build on current initiatives to support the BAS ecosystem by outlining the required level of effort that continues the advancement of the transformation roadmap.
- Provide discovery, prototyping, and implementation support for approved transformation initiatives, including adoption enablement.
- Design, enhance, and implement the Centers of Excellence (CoE) framework to centralize expertise, streamline processes, foster innovation, and cultivate talent.
- Provide change management, stakeholder engagement, communication, and user-readiness support aligned to customer needs and operational impacts.
- Support the maturation of the shared services operating model, including governance, service delivery, performance management, and continuous improvement.
- Promote adoption of standard processes, data-driven decision-making, and customer-focused service delivery.

6.4. Undelivered Orders (UDO) Capability

The desired outcome is a UDO capability that improves enterprise visibility, accountability, monitoring, and resolution of undelivered orders across DOC.

The UDO capability should support the Department in achieving the following outcomes:

- Implement a centralized capability to track, monitor, analyze, and support resolution of UDO balances and related requests.

- Provide a one-stop shop for UDO-related requests, workflow, status tracking, supporting documentation, and management action.
- Enable enterprise-level visibility into UDO balances, aging, ownership, resolution status, supporting documentation, and required follow-up actions.
- Provide dashboards categorized by bureau, entity, fund, object class, obligation type, age, risk category, DOC types and other Government-approved dimensions.
- Support aging analysis, exception reporting, audit support, and financial stewardship activities.
- Enable system notifications, reminders, and escalations for applicable stakeholders, including finance users, program offices, acquisition users, suppliers, and other authorized users.
- Provide communication materials, training, and user-readiness support.

6.5 Data Catalog and Data Strategy

The desired outcome is a mature BAS ecosystem data strategy that strengthens enterprise analytics, improves trust in data, and supports EDW as an authoritative and reliable analytics platform.

The Data Catalog and Data Strategy capability should support the Department in achieving the following outcomes:

- Develop and maintain a data catalog that includes system-level metadata, data definitions, data ownership, data lineage, authoritative sources, and business context.
- Advance a BAS ecosystem data strategy that matures the EDW as a trusted analytics platform with an integrated cross-bureau data architecture.
- Define data governance roles, stewardship responsibilities, data quality rules, metadata standards, lineage standards, and data management practices.
- Create trusted, normalized data sets that support enterprise reporting, analytics, automation, and operational decision-making.
- Enable advanced analytics, including enterprise dashboards, dynamic visualizations, secure insight-based data access, natural language querying, and analytical reporting using EDW data.
- Support collaboration with the Chief Data Officer and other DOC stakeholders by providing technical documentation, system capability information, data governance artifacts, and data maturity recommendations.
- Improve data literacy and adoption of standard enterprise reporting and analytics capabilities.

6.6 Emerging Technology

The desired outcome is a structured innovation capability that enables DOC to evaluate, pilot, and scale emerging technologies that improve operational performance, reduce manual work, and strengthen decision support.

Emerging technology and innovation services should support the Department in achieving the following outcomes:

- Identify opportunities to apply Artificial Intelligence (AI), Robotic Process Automation (RPA) (e.g., UiPath), intelligent workflow, natural language querying, predictive analytics, process mining, or other emerging technologies to BAS ecosystem challenges.
- Conduct discovery, proof-of-concept, prototyping, pilot, and implementation activities for Government-approved innovation use cases.
- Evaluate innovation pilots based on measurable value, feasibility, risk, security, scalability, user adoption, and alignment with the BAS roadmap.
- Provide clear decision points to scale, baseline, modify, or discontinue innovation pilots.
- Ensure innovation activities align with governance, security, privacy, data governance, records management, accessibility, and production release management requirements.
- Provide knowledge transfer and workforce enablement to support adoption and sustainment of emerging technology capabilities.

7. Governance, Compliance, and Operating Model Alignment

All proposed solutions, pilots, prototypes, tools, and transformation activities must align with applicable DOC and BAS governance, compliance, security, and operating model requirements.

The Contractor shall ensure proposed approaches support the following outcomes:

- Alignment with the BAS governance framework, including appropriate coordination with the Change Advisory Board, Communities of Practice, Innovation governance, Executive Board, CFO Council, and other applicable governance bodies.
- Compliance with applicable federal financial management, acquisition, property, data, security, privacy, accessibility, and records management requirements.
- Alignment with BAS change control, configuration management, release management, incident management, problem management, and service management processes.
- Protection of production stability and continuity of operations.
- Coordination with Government-designated system owners, business owners, data owners, security stakeholders, and bureau representatives.
- Traceability from customer needs and business outcomes to approved requirements, designs, pilots, deliverables, and implementation results.
- Support for audit readiness, internal controls, financial stewardship, and evidence-based decision-making.

8. Implementation Approach and Phasing

The Government expects an incremental, risk-managed implementation approach that supports early value delivery, stakeholder engagement, production stability, and measurable outcomes.

Offerors should propose an implementation approach that includes, as applicable:

- Discovery and validation of business needs, technical dependencies, data availability, and stakeholder priorities.
- Roadmap development and implementation planning.
- Pilot, prototype, proof-of-concept, or minimum viable capability delivery.
- Phased implementation by capability area or business priority.
- Integration, testing, security assessment, and operational readiness activities.
- User adoption, training, change management, and communications.
- Performance measurement, benefits realization, and executive reporting.
- Sustainment planning, knowledge transfer, and transition support.

The Government may structure the work by capability area, phase, task order, optional CLIN, or other acquisition mechanism to preserve flexibility, manage risk, and support incremental delivery.

9. Expected Outcomes / Measures of Success

The Government expects transformation activities to produce measurable organizational outcomes, not merely completed deliverables. Success may be measured through quantitative and qualitative indicators, including but not limited to:

- Improved executive visibility into budget, financial performance, process performance, and enterprise operational health.
- Reduced manual reconciliation and reporting effort.
- Increased use of standardized enterprise dashboards and authoritative data sources.
- Improved data quality, metadata completeness, lineage transparency, and data governance maturity.
- Reduced cycle time for selected business processes.
- Identification and reduction of process bottlenecks, rework, and exception volume.
- Improved user adoption of EPM, EDW, Process Intelligence, UDO, and other approved capabilities.
- Documented decisions to scale, baseline, modify, or discontinue innovation pilots.
- Improved workforce capability through training, knowledge transfer, data literacy, and Centers of Excellence support.
- Improved shared service maturity, standardization, and operational performance.

- Improved audit readiness, financial stewardship, and management visibility over high-risk areas such as UDOs, reconciliations, reporting, and process controls.

Offerors should describe how their proposed approach will improve cycle time, reduce manual effort, improve data quality, increase executive visibility, improve user adoption, support audit readiness, and enable sustainment by Government personnel.

10. Deliverables

The following deliverable categories reflect the outcomes the Government expects the contractor to achieve. Deliverables shall support planning, design, configuration, implementation, testing, governance, adoption, measurement, sustainment, and knowledge transfer.

Specific deliverable formats, review cycles, acceptance criteria, and due dates will be finalized during RFP development, contract award, and/or approved project planning. The contractor may recommend combining, refining, adding, or sequencing deliverables for Government consideration, provided the proposed approach supports the objectives of this SOO and does not reduce required outcomes, traceability, auditability, security, or operational readiness.

Each deliverable shall include sufficient detail to support Government review and acceptance, including purpose, scope, assumptions, dependencies, risks, decisions required, traceability to applicable objectives, implementation considerations, security or data impacts, and recommended next steps, as applicable.

12.1 Program Management, Governance, and Control Deliverables

- Integrated Project Management Plan
- Integrated Master Schedule
- Risk, Issue, Action, and Decision Log
- Status Reports and Executive Briefing Materials
- Governance Engagement Plan
- Requirements Traceability Matrix or equivalent traceability artifact
- Deliverable Review and Acceptance Tracker
- Production Readiness and Operational Impact Assessment
- Final Lessons Learned and Transition/Sustainment Recommendations

12.2 Enterprise Performance Management Deliverables

- EPM Implementation Plan
- EPM Solution Design and Configuration Documentation
- EPM Workflow, Approval Routing, and Version Control Documentation
- EPM Data Integration and Reconciliation Approach
- EPM Dashboards and Reports
- Planning, Budgeting, Forecasting, Consolidation, and Reporting Documentation
- Labor Forecasting and Cost Modeling Documentation

- EPM Testing Plan and Test Results
- EPM Training and User Adoption Materials
- EPM Sustainment and Knowledge Transfer Materials

12.3 Process Intelligence Deliverables

- Process Intelligence Implementation Plan
- Process Baseline and Maturity Assessment
- Process Mining Models
- Process Maps
- Process Intelligence Dashboards
- Process Bottleneck, Exception, Rework, and Compliance Gap Analysis
- Prioritized Process Improvement Recommendations
- Process Performance Metrics and Monitoring Framework
- Process Intelligence Testing Plan and Test Results
- Process Intelligence Training and User Adoption Materials
- Process Intelligence Sustainment and Knowledge Transfer Materials

12.4 Transformation Deliverables

- Transformation Roadmap
- Current-State Assessment
- Future-State Assessment
- Operating Model Recommendations
- Centers of Excellence Framework
- Shared Services Maturity Assessment
- Governance and KPI Framework
- Business Process Improvement Recommendations
- Change Management Plan
- Stakeholder Engagement Plan
- Communication Materials
- User Readiness Assessment
- Training Materials
- Adoption Metrics and Performance Reporting
- Knowledge Transfer Materials
- Post-Implementation Review

12.5 Undelivered Orders Deliverables

- UDO Capability Implementation Plan
- UDO Solution Design Documentation (detailed requirements have been developed)

- UDO Workflow and Request Management Documentation
- UDO Dashboards and Reports
- UDO Aging, Exception, Ownership, and Resolution Tracking Documentation
- UDO Notification and Escalation Design
- UDO Audit Support and Evidence Documentation
- UDO User Guidance
- UDO Communication Materials
- UDO Training Materials
- UDO Testing Plan and Test Results
- UDO Adoption and Sustainment Documentation

12.6 Data Catalog/Data Strategy Deliverables

- BAS Ecosystem Data Strategy
- Data Maturity Assessment
- Data Catalog
- Data Governance Framework
- Data Ownership and Stewardship Model
- Metadata Standards and Data Definition Documentation
- Data Dictionary
- Data Lineage Documentation
- Data Quality Rules and Monitoring Recommendations
- Trusted and Normalized Data Set Documentation
- EDW Analytics Enablement Plan
- Enterprise Dashboard and Advanced Analytics Documentation
- Chief Data Officer Collaboration Support Materials
- Data Literacy, Training, and Knowledge Transfer Materials
- Data Strategy Success Metrics

12.7 Emerging Technology Deliverables

- Emerging Technology Use Case Assessment
- Innovation Concept or Vision Briefs
- Proof-of-Concept and Pilot Plans
- Prototype Demonstrations
- Pilot Results and Value Assessment
- Security, Privacy, Data, Accessibility, and Operational Impact Assessment for Innovation Use Cases
- Scale, Baseline, Modify, or Discontinue Recommendations
- Innovation Governance Reports

- Innovation Adoption and Workforce Enablement Materials
- Innovation Sustainment and Knowledge Transfer Materials

11. Assumptions and Constraints

The Contractor's proposed approach should account for the following assumptions and constraints:

- The BAS ecosystem includes multiple integrated systems, business processes, bureaus, stakeholders, and governance bodies.
- Production stability, security, compliance, and continuity of operations are critical.
- Transformation activities must be coordinated with ongoing BAS operations, releases, enhancements, audit activities, and bureau priorities.
- The Contractor must minimize operational disruption to production financial, acquisition, property, reporting, and data services.
- The contractor must support a customer-focused approach that includes bureau engagement, stakeholder input, user readiness, and adoption planning.
- Proposed solutions should leverage existing BAS investments, data assets, governance processes, and enterprise platforms where appropriate.
- Any activity that affects cost, schedule, scope, risk, production operations, system configuration, data governance, or security must follow the appropriate Government-approved process.
- The Contractor must support knowledge transfer to Government staff and designated support teams to enable long-term sustainment.
- The Contractor must provide sufficient documentation to support auditability, operational continuity, and future maintenance.
- The Contractor must identify assumptions and dependencies related to Government decisions, Government-furnished information, data access, stakeholder availability, third-party system access, licensing, security approvals, and production release windows.

12. Applicable Documents or References

In performance of this effort, the Contractor shall comply with applicable federal statutes, regulations, and guidance, including but not limited to:

- Federal Acquisition Regulation (FAR)
- Federal Information Security Modernization Act (FISMA)
- NIST Special Publication 800-53, Recommended Security Controls for Federal Information Systems

- OMB Circular A-123, Management's Responsibility for Enterprise Risk Management and Internal Control
- Digital Accountability and Transparency Act (DATA Act) of 2014
- Privacy Act of 1974 (5 U.S.C. § 552a)
- 21st Century Integrated Digital Experience Act (IDEA) and Section 508 accessibility requirements
- Internal Revenue Code § 6103 and IRS Publication 1075 security constraints, to the extent tax-sensitive data is accessed through EDW, EPM, or data strategy activities
- FM-QSMO / Financial Innovation and Business Framework (FIBF) guidance

The Contractor shall ensure all proposed solutions, tools, configurations, integrations, pilots, dashboards, reports, data models, and transformation activities comply with applicable federal and DOC requirements for security, privacy, accessibility, and records management.

The contractor's approach shall address, as applicable:

- Federal information security requirements.
- DOC security policies and procedures.
- Authority to Operate requirements, if applicable.
- Role-based access controls.
- Data protection, privacy, and controlled access.
- Section 508 accessibility requirements.
- Records management requirements.
- Audit logging and traceability.
- Secure integration with BAS systems, EDW, and other approved data sources.
- Protection of sensitive financial, acquisition, property, personnel, supplier, and operational data.

Personnel Security

If Contractor personnel require access to sensitive but unclassified information, financial data, or systems containing personally identifiable information (PII) in the performance of this effort, the Contractor shall comply with the most recent version of Commerce Acquisition Manual (CAM) 1337.70, Department of Commerce Personnel Security Requirements, including applicable personnel screening, suitability, and background investigation requirements for contractor personnel support services.

13. Government-Furnished Information / Property (GFI/GFE)

The Government will provide access to systems, personnel, and data sources necessary for contract performance, including but not limited to:

- Read access to relevant Oracle EBS, Unison PRISM, Sunflower Systems, and EDW data required for baseline analysis and integration.
- Subject-matter expert (SME) availability from OFMS and participating DOC bureaus.
- Existing BAS program documentation, including the BAS Operating Model, applicable Functional Design Documents (FDDs), and governance artifacts, as needed and subject to applicable access controls.

14. Summary

The DOC Orchestrated Transformation effort is intended to advance the BAS ecosystem from implementation completion toward sustained enterprise modernization, shared service maturity, operational excellence, and data-driven leadership decision-making.

Through integrated EPM, Process Intelligence, UDO, Data Strategy, emerging technology, and transformation services, DOC seeks to improve visibility, accountability, workforce capability, resource optimization, and measurable business outcomes across the Department.

The Government expects offerors to propose innovative, practical, secure, and performance-based approaches that achieve the objectives of this SOO while preserving production stability, complying with federal requirements, protecting Government data, enabling long-term sustainment, and advancing DOC's long-term vision for a unified resource management ecosystem.