Strategic Asset Management (SAM)
Pre-proposal Conference

Integrated Financial Accounting System

FLITE IFAS SAM

Strategic Asset Management System

July 31, 2008

Welcome

- Today's Presenters:
    - Ms. Leslie Abbott, Program Director, Office of Management
    - Ms. Carol Macha, Director, OI&T Financial & Logistics Program Executive Office
    - Mr. Kenneth Korba, Strategic Asset Management (SAM) Project Manager
    - Ms. Mary Craig, Contracting Officer

Administrative Overview

Integrated Financial Accounting System

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Strategic Asset Management System

Ms. Mary Craig

Agenda

Topic	Presenter	Time
Opening Comments and Administrative Matters	Ms. Mary Craig	9:00 pm – 9:15 am
Welcome – FLITE Overview	Ms. Leslie Abbot	9:15 pm – 9:30 am
Program Management Environment	Ms. Carol Macha	9:30 pm – 9:45 am
Acquisition Overview SAM Overview	Ms. Mary Craig Mr. Ken Korba	9:45 am – 12:00 pm
Break		12:00 pm – 1:00 pm
RFP Review	Ms. Mary Craig Mr. Ken Korba	1:00 pm – 3:00 pm
Opportunity to Document SAM Questions	All	3:00 pm – 3:30 pm
Question and Answer Session	All	3:30 pm – 4:45 pm
Ms. Mary Craig	Wrap-up	4:45 pm – 5:00 pm

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Administrative Matters

- Please set all phones and Blackberries to vibrate

- If you must take a call — please do so outside the auditorium

- No one-on-one conversations between the Government and the vendor community

- Please note: today's conference is being video/audio taped

Facilities

- Visitor access restricted to VA auditorium, cafeteria and restrooms
  - Access beyond these areas requires an escort

- Please turn in Visitor badge to Security desk before leaving
  - If going out during lunch, leave your badge at the Security desk and retrieve it on your return

- Cafeteria located on C Level (left off the elevator)

- Phones not provided

- Restrooms -- ladies to left, men to right of the elevator banks

6

- Provide orientation on contract objectives and requirements prior to submission of proposals:
    - Technical and functional requirements
    - Business/contracting considerations

- Obtain industry questions

- Vendors will be given an opportunity to submit questions at the conference via a pre-formatted form to be used for this purpose

Disclaimers

- Presentation is based upon current information and plan of action

- Information presented today is subject to change

- Information provided at this conference will not qualify the terms and conditions of the solicitation. Terms of the solicitation will remain unchanged unless the RFP is formally amended in writing.

Feedback

- Government will sort through questions and address all that we can at the last section today

- ALL questions, even those answered today, will be documented and responses disseminated through amendment(s)

- Questions regarding information received today must be submitted to the CO by COB on August 11th.

FLITE Overview

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Ms. Leslie Abbott

- VA Mission

- About VA

- FLITE
    - Vision and objectives
    - What is it and why do it
    - What FLITE intends to deliver

FLITE Supports VA Strategic Plan

How FLITE Supports VA's Enabling Goals:

- Implement a One-VA information technology (IT) framework that enables the consolidation of IT solutions and the creation of crosscutting common services to support the **integration of information across business lines** and provides secure, **consistent, reliable and accurate information** to all interested parties

- Improve the overall governance and performance of VA by **applying sound business principles**; ensuring accountability; employing resources effectively through **enhanced capital asset management, acquisition practices** and strategic sourcing; and **linking strategic planning to budgeting and performance**

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FLITE: What Is It?

FLITE is…
a multi-year initiative to replace existing financial and asset management/inventory systems with integrated, enterprise-level systems

FLITE has…

Two Primary Components:

Integrated Financial Accounting System

and

Strategic Asset Management System

Office of Management

Program Director

- **Defines business requirements**

- **Oversees planning and implementing entire FLITE Program, including Organizational Change Management**

- **Defines desired end state for VA financial and asset management**

Collaboration

- **Create transparency between business and technical aspects of FLITE**

- **Share and re-use knowledge**

Office of Information and Technology

IT Program Manager

- **Translates business requirements into a cost-effective technical solution**

- **Plans and delivers the IT solution**

- **Manages the IT program**

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Key Things To Remember

- FLITE is:
  - Complex
  - Highly visible
  - High risk

***We need
committed, experienced partners
to help us achieve lift-off
for FLITE***

16

Program Management Environment

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Ms. Carol Macha

FLITE Geographic Distribution

- Washington, D.C.
  - Program leadership
  - Program Director's office
  - Elements of the Program Manager's office
  - SAM business requirements development

- Hines/Chicago
  - Program Manager's office

- Milwaukee
  - SAM system development and Pilot site

- Austin
  - SAM initial hosting
  - Acquisition support

- Holistic support and management

- Use of EVM to monitor the program

- Enterprise systems and architecture

- Emphasis on Organizational Change Management (OCM)

- Committed to use of IV&V activities and resources

Acquisition Overview

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Ms. Mary Craig

SAM Acquisition Approach

- Phased approach
  - Pilot → Beta → Demonstration and Validation (D&V) → National Deployment
- Award of a single task order for Pilot site (VA Medical Center, Milwaukee campus)
- Option for continuing O&M services, up to 12 months after Pilot completed
- Separate task order for a minimum of 10 Beta sites
  - CIO-SP2i vehicle
  - Pilot contractor eligible to compete for Beta and National Deployment

Task Order Type and Characteristics

- Cost Plus Fixed Fee (CPFF) and Firm Fixed Price (FFP)

- Statement of Objectives (SOO) based
  - RFP Attachments (integral to task order)
  - Bidders Library (informational)

- Applicable data rights clauses

Anticipated Evaluation Considerations

- Does contractor statement of work meet objectives of SOO

- Best value selection

- Evaluation Factors
- Technical approach and capabilities
- Project management
- Past performance
- Cost/price
- Small business participation
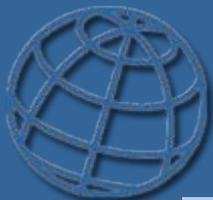
- RFP for Pilot phase released on July 18, 2008 to CIO-SP2i contract holders
  - Task Order Tracking no. C-2600
  - Task Areas:
    - #3 - IT Operations and Maintenance
    - #4 - Integration Services
    - #7 - Enterprise Resource Planning (ERP)
  - Contract award will be made to the successful bidder who qualifies under all 3 Task Areas
  - Proposals due: 5:30 EST on 8/29/2008

- Projected award: December 2008

Questions and Contact

- Direct inquiries to the Contracting Officer

- All inquiries must be in writing

- Point of Contact
  - Mary.Craig@va.gov

- Thank You!

25

SAM Overview

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Mr. Kenneth Korba

Strategic Asset Management

- **What is SAM?**
  - The SAM project will configure and deploy the VA-owned Maximo enterprise asset management software application
  - Tool for managing all classes of physical assets, supply inventories and related workforce management
  - Asset management (Logistics) component of FLITE Program

- **Replaces Legacy Systems**
    - <u>AEMS/MERS</u> (Automated Equipment Management System/Medical Equipment Reporting System)
    - <u>IFCAP</u> - Partially
    - <u>GIP</u> (Generic Inventory Package)
    - <u>PIP</u> (Prosthetics Inventory Package)
    - <u>CAI</u> Real Property (Capital Asset Inventory)
    - <u>Qqest & ATLAS</u> (NCA stand-alone Materiel Management System [MMS])
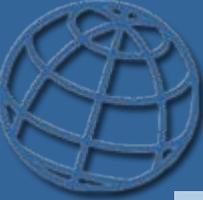
- Improve asset management system functionality

- Provide credible inventory of assets on hand
    - Property/equipment/supplies

- Aggregate costs of assets
    - Total cost of ownership
    - Property/equipment/supplies

- Automate supply inventory and processes
   - Link supply requirements to assets

- Standardize business processes and practices

- Provide consistent reporting

- Support emergency preparedness planning and response capability

- Leverage data to improve business decisions
    - Economies of scale
    - Standardized products and services

- Consolidation and integration of critical asset management systems
  - Current: Locally – Single application systems
  - Future: Nationally – Consolidated national database

- COTS solutions for sustainability

- Seamless integration with IFAS
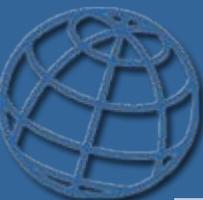
- Multi-phased
  - Pilot → Beta → D&V → National Deployment
  - Repeatable processes

- Standardize
  - Business processes and practices
  - Data and data types

- Incremental Release
  - Reduces the risks associated with a complete system cutover and the costs associated with full duplex or parallel system testing

- Comprehensive testing and quality assurance

- Comprehensive, sustainable, repeatable training

- Robust OCM capability that ensures VA employees are actively involved

- Maintain senior leadership involvement and commitment

- Site readiness activities

- Sustained communication and education to ensure programmatic and business concerns/issues are addressed

- Leverage previous investments wherever possible
  - Requirements, lessons learned, programmatic documentation, reports, data cleansing/conversion, training materials, etc.
  - Hardware and software components

SAM Scope

Work Management	Equipment Management

• **Request to Complete**
    • **EMS**
    • **SPD**
    • **Projects**
    • **Job Plans**
    • **PM Plans**
    • **Work Orders**
    • **Handhelds**
    • **Bio-Medical**
    • **Corrective Measures**
    • **Operations and Maintenance**
    • **Transportation**
	• **Acquire to Retire**
	    • **EILs**
	    • **Reports**
	    • **Bar Codes**
	    • **Handhelds**
	    • **Excess**
	    • **Transfers**
	    • **Disposal**
	    • **Fixed Assets**
	    • **NX**
	    • **EMS**
	    • **SPD**

Inventory Management	**Facility Management**

• **Identify, Acquire, Store and Issue**
    • **Item Master**
    • **Item Management**
    • **Replenishment**
    • **Distribution**
    • **Handhelds**
    • **Reports**
    • **SPD**
    • **Prosthetics**
    • **EMS**
    • **A&MMS**
	• **Design, Build, Maintain and Operate**
	    • **Buildings**
	    • **Utility Systems**
	    • **KPIs**
	    • **Handhelds**
	    • **Metering**
	    • **EMS**
	    • **Building Service Equipment**
	    • **Spare Parts**
	    • **Roads and Grounds**
	    • **Energy Management**
	    • **Waste Management**
	    • **Locations and Space Management**

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*Acronyms not defined above are included in the Glossary.

SAM and IT Asset Management

- SAM is the **system of record** for all VA assets
  - IT asset management tool selection and development **is not** part of SAM scope
  - When selected, configured and deployed, VA IT Asset Management (ITAM) Project will integrate with SAM

35

SAM Integration with IFAS
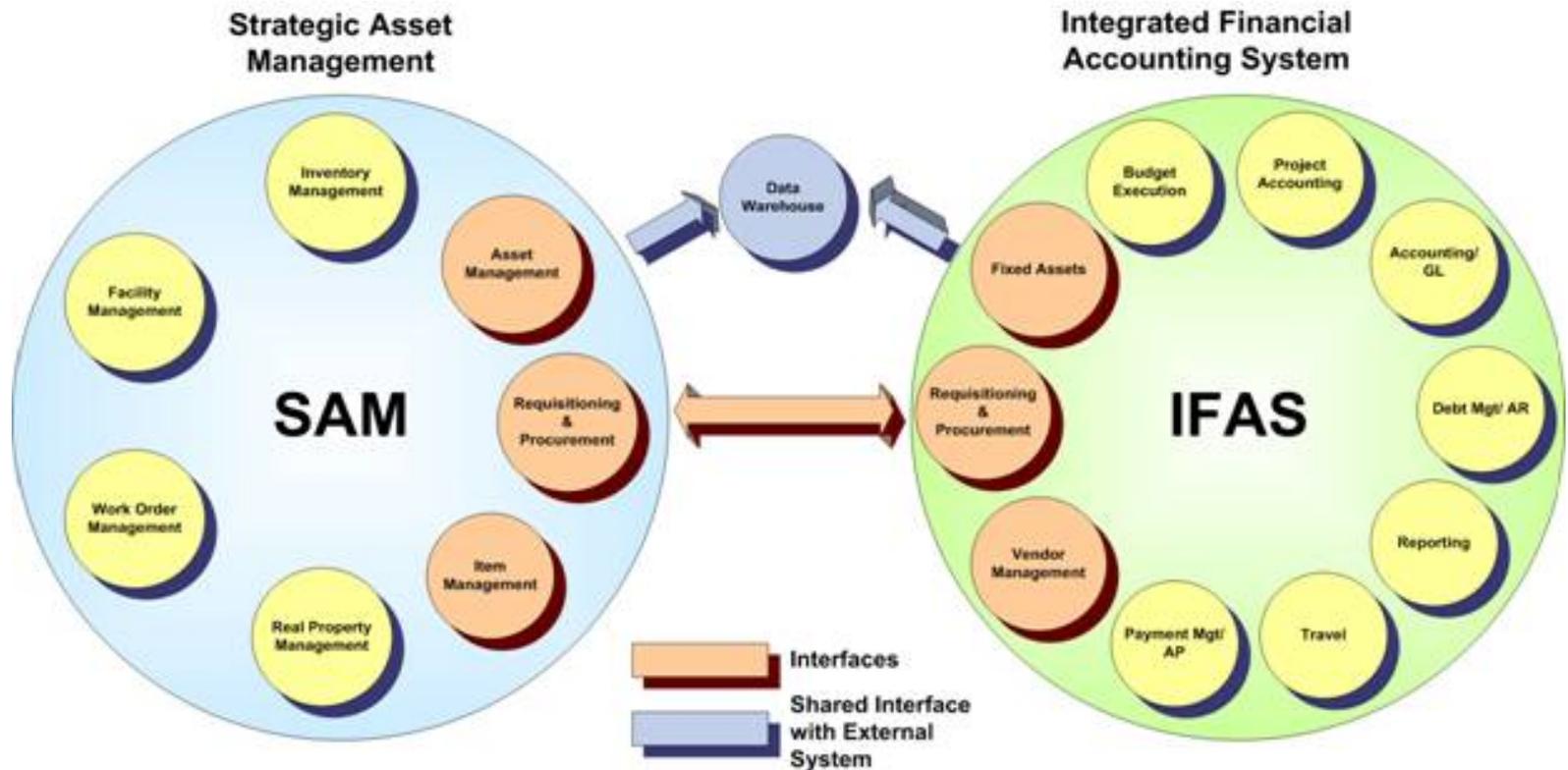
- VA-Wide (VHA, NCA, VBA)

- New technological paradigm

- Training intensive

- Critical system for operations

Scheduled Break

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RFP Review following the Break

Responses to Submitted Questions

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VA Staff