**AGENCY IDENTIFICATION**

**REQUEST FOR QUOTE**

**ENTERPRISE COLLABORATION**

**AND**

**CUSTOMER RELATIONSHIP MANAGEMENT**

**CORRESPONDENCE SYSTEM IMPLEMENTATION**

**Request for Quote Overview- Task Order 0001:**

The AGENCY intends to award an initial Task Order under the Multiple Award Blanket Purchase Agreement for SalesForce Development Support Services to support the implementation of a Customer Relationship Management System (CRM) Application utilizing the SalesForce Platform.

Note: All sections of this RFQ will be incorporated into the contract except the Statement of Objectives, Instructions, and Evaluation Factors.

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Section A: Statement of Objective

1. Introduction and Overview

Insert technical and agency background information specific to the Product.

1. Objective

The objective of this task order is to utilize the agile development process to establish to develop a Customer Relationship Management (CRM) application for the *AGENCY*.

PRODUCT VISION: The purpose of the Customer Relationship Management application will be to maintain a centralized view of all interactions and improve the outreach experience to citizens contacting and engaging with the *AGENCY* through various methods. This new system will replace all critical and major businesses processes supported today by the legacy CRM system and any additional legacy systems.

For this task order, the contractor will utilize their proposed agile software development methodology to implement the CRM system. This methodology defines the repeatable process of providing development and deployment services in small iterations lasting two to five weeks which generally results in the delivery of usable software, data, or product, which have little to no inherent defects. Each iteration shall be defined in the Performance Work Statement and should document how planning, requirement analysis (user story building), design, coding, testing, quality assurance, and documentation will all meet the contractor’s proposed “Definition of Done”.

A minimum viable product of this system is expected within the first 6 months under this task order. It is the Agency’s desire that the critical components which are defined as “must haves” in Appendix X are included to the greatest extent possible in the MVP. Additional major business components are defined as “should haves” and “nice to haves.”

1. Scope

The scope of this task order falls under Functional Areas 1, 2, 3 & 6 of the Blanket Purchase Agreement (BPA) and includes:

* Initial application design and implementation
* System configuration to support business processes
* Integration for input and output methods
* Workflow design and implementation
* Overall collaboration of applications
* Enhancements, patches, and updates to applications, data, or cloud systems
* Data import of records collected from legacy systems
* Automated testing
* Training of end users on the systems

Scope *does not* include:

* Workstations, data centers, server systems, and connectivity
* Supporting Legacy applications/systems
1. Period and Place of Performance

The period of performance start date of the acquisition is XX/XX/XXXX

The primary place of performance for this effort will be at government or contractor facilities if designated.

1. Order Type/Award Term Option Incentive

This task order shall be Firm Fixed Price/Award Term Option Incentive.

For this task order the Government will offer two (2) Award Term Options which may encompass future enhancements, releases, development efforts, or operations & maintenance related to the establishment of the Enterprise Collaboration platform or the CRM application. Award Terms may only be awarded for an overall “Excellent” performance rating based on mutually accepted metrics, which will be included in an Award Term Plan to be executed on or around Kick Off. The Government will appoint an Award Term Determining Official (AFDO) who will provide the official performance review and approval for an Award Term Option to be exercised. The ATDO in conjunction with the Contracting Officer will make a unilateral decision as to the exclusion of any portion of the performance period from the evaluation of ratings and calculation of the award term.

Award Term Options are not required to be consecutive with the previous period of performance of the base period or additional options, but may not be exercised longer than 6 months after the final date of the period of performance. Award Term Options can be awarded for no more than one year. They are contingent on continued Government requirements and funding availability for the CRM application. The Award Term Options are un-priced options that will be negotiated and approved from a technical and budgetary standpoint prior to the Contracting Officer awarding the option. Award Term Options must adhere to the proposed Agile methodology and processes as awarded at the BPA level unless an exception is provided by the Contracting Officer prior to award.

Functional Requirements, translated into Epics and User Stories that will be used to populate the Product Backlog may include, but are not limited to:

1. Contract Line Item Number (CLIN) Format

The Offeror shall submit their proposed CLIN structure in a manner that represents agile software development methodology in which iterations are priced.

|  |
| --- |
| **BASE PERIOD: 6 months** |
|  |
| **CLIN 0001, FFP- Completion** - The Contractor shall provide services for the Government in accordance with the Performance Work Statement (PWS)  |

|  |  |
| --- | --- |
| Length of Iteration | \_\_\_\_\_\_\_Weeks |
| Price Per Iteration | $XXXXX |
| Period of Performance: | 6 months |
| Firm Fixed Price (Completion): | $XXXXX |

The contractor shall be paid upon the completion of each iteration upon its acceptance and verification by the Contracting Officer’s Representative (COR). Invoices shall be submitted at the end of each iteration in accordance with the delivery schedule as established in the Performance Work Statement.

1. Technical Overview
	1. Technical Environment

The platform will contain Sensitive But Unclassified (SBU) and Personally Identifiable Information (PII). No classified information will be contained in these systems. Federal Information Processing Standard (FIPS) 199 classification is likely *High* for Availability, *Moderate* for Integrity, and *Low* for confidentiality.

* 1. Stakeholders

 For the completion of this task, the *AGENCY* will provide access to the following stakeholders:

**Product Owner:** Will manage designated products and communicate with the stakeholder community, are empowered to make business decisions rapidly, set work priorities within designated products, and will remove obstacles to product success. They help write user stories, manage a product’s backlog, and work with AGENCY management and partners as customers on a daily basis. Product owners make the final call on functionality and features for their products.

**Contracting Officer’s Representative (COR):** Will be responsible for approving end deliverables, managing the Quality Assurance Surveillance Plan (QASP), evaluating performance, and managing schedule according to the submitted Performance Work Statement (PWS)

 **Stakeholders:** For this effort the following offices have been designated as Stakeholders for the CRM application:

**End Users: *(provide specific information about End Users of the system-could also provide personas of “typical end users” as part of SOO)*** The current system supports roughly XXXXXXX end users. The majority of these end users are US Citizens accessing the AGENCY website for correspondence related to XXXXXX. End Users may be used in this effort in usability testing and/or customer satisfaction surveying.

1. Required Tasks
	1. **Task 1: Initial Environment System Configuration and Implementation**

**Objective:** Contractor shall provide the *AGENCY* with a secure, stable, records compliant, commercial collaboration, workflow enabled environment.

* + 1. The contractor shall design the system for maximum interoperability across all *AGENCY* offices to ensure flexibility in leveraging the system for future applications.
		2. The contractor shall configure the following system instances to support tiered code-release separation and quality assurance and an automatic testing methodology:
		3. The contractor shall seek to configure off-the-shelf aspects of the selected platform before recommending a customized coding approach. The contractor shall develop system configuration in such a manner as to leverage maximum re-use and sharing across the platform. The contractor shall ensure that all changes with impacts to other applications on the platform are minimized. Where such changes are required, they shall be documented and the release coordinated well in advance with the appropriate product owner and development team.
		4. The contractor shall provide incremental documentation through sprint cycles that results in full technical documentation or configuration for all software development efforts and product releases with all information necessary to document processes, procedures, code artifacts, and/or policies that were implemented in the creation of the development work.
		5. Once any functionality is released under this call, it shall be the responsibility of the contractor to fix at their own expense any resulting bugs or system defects that are related directly to the contractor’s implementation, code, or application design. The fix of these bugs shall not affect other scheduled user stories, deliverables, or releases and shall be at no cost to the government. This requirement for fixing bugs or defects is not considered system maintenance or application enhancements.

|  |  |
| --- | --- |
| **Instance Name** | **Description and Purpose** |
| Development | **Description:** The *Development* instance(s) will exist as the primary development site for integrators to fix bugs, develop new features, and test unit functionality to ensure items are ready for update to Staging. These instances will be accessed typically only by administrators and developers.**Purpose:** To provide isolated system instance(s) for active development and/or Unit Testing.**User-base:** Integrator development team and infrequently the Integrated Project Team as required.**Availability:** The *Development* instance(s) shall not be bound to any Service Level Agreement and may be subject to maintenance and upkeep on an as-needed basis. **Feature Set**: The *Development* instance(s) shall run the code version required for active development. **Data:** The *Development* instance(s) shall dummy data such that it is rendered non-sensitive and non-specific for the purposes of development.  |
| Staging | **Description:** The *Staging* instance shall be a system for formal User Acceptance Testing and Training as well as collaboration with the Integrated Project Team and agency user community.**Purpose:** To separate User Acceptance Testing and Training activities from Unit Testing or Production activities.**User-base:** Integrator development team, the Integrated Project Team, and designated users for testing and training as required.**Availability:** The *Staging* instance shall be generally available to Integrated Project Team members during working hours (7:30am – 7:30pm) and at the integrator’s discretion for maintenance and upkeep. **Feature Set**: The *Staging* instance shall run the most current version of the production code. It may be updated with Unit Test or new release code until being fully replaced with the current code after the next production release.**Data:** The *Staging* instance shall include masked, truncated, or redacted agency data such that it is rendered non-sensitive for the purposes of testing and training.  |
| Production | **Description:** The *Production* instance shall be a system supporting the work of active *Production* instance users.**Purpose:** To separate development and testing activities from actual government business processes and records.**User-base:** The integrator’s development team, the Integrated Project Team, and the *Production* user community.**Availability:** The *Production* instance shall be available for user access in accordance with the service level agreement for the platform. **Feature Set**: The *Production* instance shall run the current version of the production code feature set after a release to production. The *Production* and *Recovery* instances must run the same code version at all times. **Data:** The *Production* instance shall include live, SBU agency data and only be modified by authorized users within their assigned security roles. The data set active on the *Production* instance should be complete, comply with both Federal Records Act (FRA) requirements, be backed up in accordance with the platform disaster recovery plan, and be able to be properly exported for transfer to National Archives and Records Administration (NARA) at the appropriate times. |
| Recovery | **Description:** The *Recovery* instance shall be an entirely separate, hot fail-over system to support the work of the *Production* instance users in the event of an outage or inaccessible *Production* instance.**Purpose:** To provide continuity of operations for critical business processes as well as recovery and preservation of production data in the event of a catastrophic outage with the *Production* instance.**User-base:** The integrator’s development team, the Integrated Project Team, and the *Production* user community.**Availability:** The *Recovery* instance shall be available for user access in accordance with the service level agreement for the platform. **Feature Set**: The *Recovery* instance shall run the current version of the production code feature set after a release to production. The *Production* and *Recovery* instances must run the same code version at all times. **Data:** The *Recovery* instance shall include live, SBU agency data and only be modified by authorized users within their assigned security roles. The data set active on the *Recovery* instance should be complete, comply with both Federal Records Act requirements, be backed up in accordance with the platform disaster recovery plan, and be able to be properly exported for transfer to NARA at the appropriate times. |

* + 1. The contractor shall design and implement a user rights, permissions, and security model as notionally described in APPENDIX A -Rights Model Spreadsheet.
		2. The system shall securely transmit all data using Secure Socket’s Layer encryption at 128-bit or higher.
		3. The system shall restrict all network traffic to be accessible only from designated networks.
		4. The contractor shall design database entities to comply with the FRA as amended:
			1. The contractor shall configure the system such that complete sets of database records (FRA) can be easily exported into separate, discrete export files.
	1. **Task 2: CRM Application Design and Implementation**

**Objective**: The contractor shall design and implement basic system features to support traditional CRM functions including the following:

*Include listing of the basic features that will initially be included in the MVP. This is not ALL features just the high level overview of the most important or required features of the CRM for the specific end users supported. This can also be included as an attachment and not in the SOO.*

*Example:*

* + - 1. One centralized constituent record per citizen with links to all associated vital data and correspondence records
			2. Newsletters (bulk e-mail)
			3. Reports and dashboards
			4. Advanced search
			5. External web forms (Contact Us)
			6. Internal web forms (Greetings)
			7. Rules engines, workflow, analytics, and service-level-agreements
			8. Ad-hoc data import and export
			9. Document version control, workflow, and library templates/repository

7.2.1 The contractor shall architect system objects, fields, and database entries to support the associated business processes.

* + 1. The contractor shall utilize the system support business processes as described in APPENDIX B-Vignettes Slide Deck and APPENDIX C –User Stories as the basis for the CRM application. While it is anticipated the MVP will include these initial features the final User Stories implemented will be prioritized and managed by the Product Owner and/or COR in conjunction with the contractor based upon a mutual agreed upon Product Roadmap and Backlog.
		2. The contractor shall ensure the system is configured to support expansion for additional requirements.
		3. The contractor shall configure the system in a way to support “Open Source” publishing.
	1. **Task 3: Data Import collected from Legacy Systems**

**Objective:** The contractor shall import data collected from legacy systems in a manner that maintains vital record data such as name, address, e-mail address; association data such as group-membership, interests, contact preferences, flags, and affiliations; as well as correspondence items, linkage with constituent record, contact history, and attachments.

* + 1. The contractor shall analyze, assist with exports, de-duplicate/scrub, prepare, and import data that has been collected from legacy systems including:

The primary legacy CRM system,

Provided as a government intermediary MySQL database available to the contractor

Approximately 40GB of data and 400GB of file attachments

* + 1. The contractor shall work with the government stakeholder offices during design sessions to identify and separate legacy system data into two sets of relevant data: Operational data records and Historical data records.

Operational data records are required for critical business processes and shall be prioritized, imported, and available to users at system activation

Historical data which must be imported to ensure overall data integrity for the stakeholder departments and shall be treated as a lesser priority than operational data but planned for with regard to overall data integrity

* + 1. The contractor shall verify in writing to the Government that data migrated from the legacy system to the new system is complete and accurate in accordance with the Federal Records Act and any other applicable federal law, according to the agreed upon framework coordinated with *AGENCY* and the Contractor and that all data is accessible.
	1. **Task 6: Documentation and Training**

**Objective:** The contractor shall provide complete documentation for all systems and applications and provide training that will enable end users to utilize the system.

* + 1. The contractor shall provide comprehensive training materials for end users and system administrators for utilization and administration of the system.
			1. Videos or self-guided training materials may be used
			2. Training features built into the system are used to the greatest extent possible
		2. The contractor shall provide initial end-user training on a per-department basis during the initial on-boarding of users to the new system.
		3. The contractor shall provide “train-the-trainer“ classes for selected trainers and administrators.
1. Operational Constraints
	1. Legal Constraints:
		1. The system shall store records in a manner compliant with both the Federal Records Act (FRA) of 1950
	2. Data Export Constraints:
		1. The system shall enable export and transfer of records to the National Archive and Records Administration (NARA) in an agreed upon file format.
	3. Operational Constraints:
		1. All applications must meet Section 508 Accessibility Requirements
2. Deliverables

Deliverables under this Task Order are defined as the completion and acceptance according to the “Definition of Done” as proposed for this task order, which are based on the contractor’s agile software development methodology.

Each deliverable shall incorporate AGENCY IT requirements as detailed in the Appendix of this document and the United States Digital Service Playbook standards (<https://playbook.cio.gov>) and be compliant with Section 508.

1. Inspection and Acceptance

## Overview

The contractor shall ensure proper control and coordination of all deliverables to ensure they are on time. Unless otherwise stated, the Government will review deliverables and notify the contractor of acceptance or non-acceptance within 5 business days. Representatives of the contractor shall meet with the COR and other members of the Government as necessary to review status of deliverables.

## Notice Regarding Late Delivery

The Contractor shall notify the COR, or other authorized representative designated in each Task Order, as soon as it becomes apparent to the Contractor that a scheduled delivery will be late. The Contractor shall include in the notification the rationale for late delivery, the expected date for the delivery, and the project impact of the late delivery. Such notification in no way limits any Government contractual rights or remedies, including, but not limited to, termination.

## Default Acceptance

Notwithstanding the foregoing, any deliverable requiring acceptance by the Government shall be deemed to be accepted by the Government if no written notice of non-conformity has been received by the Contractor within the acceptance period.

**SECTION B: Instructions to Offerors**

**SUBMISSION OF QUOTES**

**Quotes shall be submitted by 12:00 noon Eastern Standard Time on Month, Day, Year.**

Quotes shall be submitted to

Quote submission will consist of two (2) parts: Technical Submission and Price

In addition to price the following factors will be used to determine best value. Technical factors are more important than price:

* Performance Work Statement
* Proposed QASP

**SECTION I - TECHNICAL SUBMISSION**

The Technical submission shall include the following:

 FACTOR 1 – Performance Work Statement (PWS)

 FACTOR 2 – Notional Quality Control Plan

 Technical Assumptions, Conditions or Exceptions

**FACTOR 1 – Performance Work Statement**

Offerors shall provide a Performance Work Statement (PWS) in response to the Statement of Objectives and this RFQ. The deliverables under this PWS are to have functionality scheduled for an available release without defects.

The PWS shall clearly illustrate the process through which agile development of software in small iterations lasting two to five weeks, which results in the delivery of usable product. The Offeror must propose a “Definition of Done” that will establish the criteria must be met before a “product increment” or User Story is considered done. This will demonstrate the validation necessary to complete an iteration.

The PWS shall describe how user stories are to be sized, how estimation and determination of sizes shall be accomplished, and how these will correlate to iterations and throughput for this task order.

Additionally, the PWS should provide a detailed process for management of the overall task order including working with the Product Manager, COR, and End Users to capture user stories, prioritize, and work-off the product backlog.

The Offeror shall demonstrate in its PWS how the applications, databases, and other products it will produce will meet all requirements for compliance with Section 508 and AGENCY’S IT Security Requirements.

**FACTOR 2 – Proposed Quality Assurance Surveillance Plan (QASP)**

Offerors shall propose a Quality Assurance Surveillance Plan (QASP) and Performance Measurement approach which is commensurate with the agile software development methodology proposed. This shall include how proposed performance standards will be monitored, evaluated, and reported. The purpose of the notional QASP is to provide evaluators with an understanding of how measures and metrics will be applied based on the proposed technical solution.

**Technical Assumptions, Conditions, or Exceptions**

Technical submissions shall include all (if any) assumptions, conditions, or exceptions with any of the requirements or terms and conditions of the Statement of Objectives. If not noted in this section of your quote, it will be assumed that there are no assumptions for award, and that the Contractor agrees to comply with all of the terms and conditions as set forth herein. It is not the responsibility of the Government to seek out and identify assumptions, conditions, or exceptions buried within the submission.

The Government reserves the right to reject any quote that includes any assumption that impacts or affects the Government’s requirements.

**SECTION II – PRICE**

The price quote shall include the following:

Offerors shall submit a price quote, which shall include the following:

* Firm Fixed Price per iteration
* Firm Fixed Price by CLIN
* Supporting documentation
* Assumptions, conditions, and exceptions related to price

The Government anticipates that a Firm Fixed Price Task Order will be issued as a result of this solicitation.

**Supporting Documentation:** Supporting documentation - The price quote shall provide supporting documentation to support the pricing proposed. This shall demonstrate the correlation between the proposed technical solution in the PWS and the pricing submitted. The supporting documentation shall also include a Basis of Estimate (BOE) which aligns to how the pricing methodology is applied within each iteration. The BOE should include, but is not limited to, such things as:

* Number of Teams proposed
* Size of Agile Teams
* Labor categories, including BPA Pricing, used to comprise Team
* User Story sizing
* Additional discounts applied

**Price Assumptions, Conditions, or Exceptions**

Submit all (if any) assumptions, conditions, or exceptions with any of the terms and conditions of this statement of objectives. If not noted in this section of your quote, it will be assumed that the offeror proposes no assumptions for award, and agrees to comply with all of the terms and conditions as set forth herein. It is not the responsibility of the Government to seek out and identify assumptions, conditions, or exceptions buried within the offeror’s quote. The Government reserves the right to reject any quote that includes any price assumptions, conditions, or exceptions that impact or affect the Government’s objectives or requirements.

**Section C: Evaluation of Offers**

**Evaluation and Basis of Award**

This task order will be awarded to the SIIS BPA award holder that can provide the services that represent the best value to the Government.

Award will be made to that responsible Offeror whose combination of those factors offering the best overall value to the Government utilizing a tradeoff process. This will be determined by comparing differences in technical capability with differences in price to the Government. In making this comparison, the Government is more concerned with obtaining superior technical merit. However, the Government will not make an award at a significantly higher Price to the Government to achieve slightly superior technical merit. The Government reserves the right to make an award to other than the lowest priced Offeror or to the Offeror with a higher technical score if the Contracting Officer determines that to do so would result in the best value to the Government.

In addition to price, this assessment will be based on the Technical Factors of Factor 1-Performance Work Statement, Factor 2 – QASP

**FACTOR 1 – Performance Work Statement**

The Government will evaluate the feasibility of the proposed PWS to meet the Objectives of the Agency.

**FACTOR 2 – Quality Assurance Surveillance Plan (QASP)**

The Government will evaluate the whether the proposed performance standards align with the proposed agile development methodology, the rationale behind the proposed performance standards and assess whether the total solution will ensure that the performance standards are met.

**Technical Assumptions, Conditions, or Exceptions**

All assumptions shall be evaluated as part of the individual factor or sub factor to which they apply. The Government reserves the right to reject any quote that includes any assumption(s) that impact satisfying the Government’s requirements.

**SECTION II – PRICE**

Price will be evaluated to determine whether the firm, fixed price proposed is reasonable. This determination will be based on the review of the technical solution in comparison to the total proposed price and the backup documentation submitted. Pricing for this effort is required to be of a unit of measure that is equivalent to the proposed iteration cycle as proposed in the Performance Work Statement. The technical solution for sizing, iteration time, and throughput must correlate to the proposed pricing.

**Price Assumptions, Conditions, or Exceptions**

Submit all (if any) assumptions, conditions, or exceptions with any of the terms and conditions of this statement of work. If not noted in this section of your quote, it will be assumed that the offeror proposes no assumptions for award, and agrees to comply with all of the terms and conditions as set forth herein. It is not the responsibility of the Government to seek out and identify assumptions, conditions, or exceptions buried within the offeror’s quote. The Government reserves the right to reject any quote that includes any price assumptions, conditions, or exceptions that impact or affect the Government’s objectives or requirements.

**APPENDIX TO REQUEST FOR QUOTE**

**APPENDIX A: Notional CRM Rights Model Spreadsheet**

**APPENDIX B: Vignettes Slide Deck**

**APPENDIX C: Enterprise Collaboration and User Stories -Final**