



Salesforce Implementation, Integration, and Support Services: GSA Blanket Purchase Agreements Ordering Guide

Strategic Solutions Contract Operations Division



Version

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The General Services Administration (GSA), Federal Acquisition Service (FAS), Integrated Technology Services (ITS), Strategic Solutions Contract Operations Division offers a portfolio of pre-competes, Information Technology (IT) solutions Blanket Purchase Agreements (BPAs) established in accordance with FAR 8.405-3. The **Salesforce, Implementation, Integration, and Support Services (SISS)** BPAs provide for the Government's Salesforce technical development, operations and maintenance, and implementation strategy requirements.

We make it easy for Government Buyers by providing:

- Access to highly-qualified vendors
- Pre-competes, multiple-award BPAs
- Small business opportunities
- Shorter procurement lead time
- Customer-focused staff with experience in technology acquisitions
- Reduced duplication in application development

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1.0 Introduction

SIISS Ordering Guide

The SIISS Blanket Purchase Agreements (BPAs) were competitively awarded by GSA in accordance with FAR 8.405-3 to provide a streamlined method for Government Agencies to procure expert services on an Agile basis for high quality Salesforce implementation, integration and support services.

This unique, first-of-its-kind BPA, provides agencies quicker, faster, and safer access to high-quality, cost-effective services for Salesforce, one of the industry-leading Software-as-a-Service cloud providers. The BPA piloted rigorous evaluation standards which required vendors to demonstrate their ability to deliver Salesforce products using an Agile methodology, an evaluation strategy that can be used as a repeatable framework making future service acquisitions faster and more efficient.

In addition to quality improvements, this BPA offers the unique opportunity for individual agencies to develop technology with a consistent development approach, improving interoperability and the reuse of code and best practices in alignment with the Federal Digital Government Strategy 'Shared Platform Approach' to "build once, use many times". Applications developed under this BPA can be shared in a common repository called GSA Labs (labs.gsa.gov), an open government community for exchange of Salesforce applications and code hosted by the General Services Administration. Agencies can potentially save between 50 and 80 percent on application development costs by reusing the code and configuration shared on GSA Labs.

1.1 Labor Hour Pricing

SIISS BPA holders were required to provide prices discounted off their Schedule contract for explicitly defined, standard services. Additional discounts should also be obtained at the task order level.

1.2 Tier Discounting

When the aggregate dollar value of orders is reached at each tier shown in the table on page 14, the GSA BPA CO will execute a unilateral modification to increase the BPA discount percentage by the amount shown for that tier. For example, if the initial BPA discount were 5% and Tier 1 shows an additional discount of 1%, the BPA discount would increase to 6% from that point forward until the next tier is reached.

1.3 Higher Confidence in Quality Performance

BPA holders are required to implement applications, platform standards, and products utilizing and Agile Software Development and user experience (UX) processes and best practices that achieve results through continuous capability enhancements, minimal downtime, prompt response to emerging needs, demonstrated reliability, and optimized performance with resource utilization minimized.

1.4 Comprehensive Services from a Single Task Order

Users can obtain services using single fixed-price, time and materials, labor hours, or a combination of the above order types.

1.5 Primary Goods and Services

The scope of the BPAs encompasses requirements for providing platform strategy services, Center of Excellence management and governance, business process analysis, solution architecture and design, application development and configuration, implementation, release and enterprise environment management, and maintenance services required to successfully implement the Salesforce platform and applications to meet agency requirements.

1.6 Funds Obligation

This BPA does not obligate any funds. Funds will be obligated on task orders issued by authorized users. It is the responsibility of the ordering contracting officer to ensure compliance with all applicable fiscal laws prior to issuing an order under a BPA, and to ensure that the BPA holder selected provides the best value for the requirement.

1.7 Ordering Eligibility

- See GSA Order ADM 4800.2H (or latest version if updated during the period of the BPAs), “Eligibility to Use GSA Sources of Supply and Services” available for download here: <http://www.gsa.gov/portal/content/104212>
- Contractors may purchase on behalf of agencies when authorized in accordance with FAR Part 51 and the ordering agency’s contracting officer. State and local governments and tribes are not authorized to place orders under these BPAs.

Award Date: December 21, 2015

Term: 5 years

General Information Website: SISS BPA information is available at:
<http://www.gsa.gov/portal/content/120966>

Awarded Vendor List

- Accenture Federal Services LLC (Accenture) 800 N. Glebe Road, Suite 300, Arlington, VA 22203
- Acumen Solutions, Inc. (Acumen) 1660 International Drive, Suite 500, McLean, VA 22102
- Capgemini Government Solutions, LLC (Capgemini) 1900 Campus Commons Drive, Suite 250, Reston, VA 20191
- Deloitte Consulting, LLP (Deloitte) 1919 North Lynn Street, Arlington, VA 22209
- Phase One Consulting Group, LLC (Phase One) 99 Canal Center Plz, Suite 405, Alexandria, VA 22314-1588
- Pricewaterhouse Cooper Public Sector, LLP (PwC) 1800 Tysons Blvd., 6th Floor, McLean, VA 22102-4257

2.0 Seven Steps to Order from SIISS BPAs

This section provides seven simple steps necessary to place an order under the SIISS BPAs.

2.1 Scope Determination

Develop Requirements

First, determine if the requirement is within scope of the BPAs. Services under GSA Multiple-Award Schedule 70 - General Purpose Commercial Information Technology Equipment, Software, and Services SIN 132 51 - IT Professional Services and SIN 132 50 - Training Courses are included in the BPA scope.

The services provided under the BPAs are for enterprise-level Salesforce partners who can manage implementations within complex, multi-org government cloud ecosystems.

Solicitations under the BPAs will specify which Functional Area(s) will be included in scope for each individual order. A task order can include one Functional Area or any combination of the following:

- Functional Area 1: UX Design, Business Analysis, Development, Integration
- Functional Area 2: Data Management and Securitization
- Functional Area 3: Program Management Support and Center of Excellence (COE) Governance
- Functional Area 4: Release Management and Post-Implementation Maintenance Support
- Functional Area 5: Support / Help Desk
- Functional Area 6: Training
- Functional Area 7: Agile Coaching, Agile Portfolio Management, and Implementation

Task Order Strategies

This BPA is established to facilitate the easy adoption of Agile software development practices for the implementation of Salesforce products. The following are the best practice strategies to consider when setting up the task order requirements, evaluation criteria, and incentives.

- Have a clear Product Vision Statement: This translates to the main objective for the acquisition and all strategy decisions should be made around accomplishing the vision.
- Adopt the guiding principles of the Agile Manifesto (<http://agilemanifesto.org/>) in the contract process. Success in agile acquisitions are found in bringing private sector practices to the procurement process to the greatest extent possible.
- Keep Period of Performances Short: It is recommended in FAR Part 39 that agencies use modular contracting methods to the greatest extent possible for the acquisition of information technology. Consider structuring task order periods of performance on six month to one year with the focus on delivery of quality product, reduced risk to the program, and to avoid the potential towards proprietary solutions.

- Separate the “functional system” requirements from the “contractual requirements”: structure Statements of Objectives around purchasing a repeated process for the delivery of functional product.
- Include a “Definition of Done” as a contractual requirement that all User Stories must adhere to in order to be accepted. This allows for review and acceptance of work to be based on product delivery and not on individual team member’s performance.
- Avoid “AgileFall” which is the process of attempting to adopt Agile but requiring waterfall reporting, deliverables, and expectations, such as work breakdown structures, comprehensive testing plans, or heavily defined up-front system requirements.
- Strive to award task orders on a Firm Fixed Price per Iteration basis for Agile development. This reduces risk to the government, allows for warranty clauses to be applied, focuses on delivery of working product, and helps demonstrate the return on investment through delivery of tangible system features, data, or bug fixes.
- Structure contract performance metrics and QASPs around the process, not the system. The system acceptable quality levels can be described as conditions of User Story acceptance criteria. In the agile software development process, metrics are burn down/up charts, throughput, velocity, bug rates, time to market, etc. These focus on optimization of the contractor’s team and process.
- Have an Exit Strategy. Consider how fast a new task order could be competed in the event of non-performance. Ensure that documentation, test scripts, etc. are all developed in a best practice format that will allow for easy transition. This is particularly useful in a multiple award BPA environment as a new acquisition is only required to go to a limited pool of competitors which will make it feasible to quickly award a new order.
- Design with “open source” as an objective, as well as delivery of prototypes or minimum viable products. This demonstrates quick successes, allows the products to get into the hands of end users faster, and makes logical breaking points for programs to consider before expanding or contracting for further work.

Solicitation Strategies

Communication is encouraged for successful implementations. Agile works best in a trusted environment and this starts in the solicitation phase.

- Industry days, with the ability to facilitate anonymous question and answer sessions, are encouraged.
- Consider using a multi-phased approach to competition. Using due-diligence sessions or technical concept papers Phase followed by oral proposals and formal Performance Work Statement Phase can help acquisitions be conducted quickly.
- If conducting oral proposals, consider requiring that they respond to scenarios that will allow the offerors to show how they will run their proposed Agile processes, community of excellence meetings, or other services under additional functional areas.

2.2 Prepare Performance Work Statement (PWS) or Statement of Objectives (SOO)

Agile software development, by its nature, is performance-based and driven by objective, therefore, it is recommended that all task orders are conducted using Performance Based Methods as outlined in FAR 37.6. When drafting your requirements, here are some salient points to consider:

- Scope of work to be performed
- Performance objectives
- Technical requirements
- Performance period
- Deliverable schedule

Period of Performance

The term of the SISS BPAs is five (5) years. Contractors may be awarded a BPA that extends beyond the current term of their GSA Schedule contract, so long as there are option periods in their GSA Schedule contract that, if exercised, will cover the BPA's period of performance.

2.3 Prepare the Request for Quote (RFQ)

Follow your agency's usual procedures for preparing an RFQ, including any internal policy and procedures related to acquiring IT products and services.

2.4 Issue the RFQ

When issuing an RFQ under the SISS BPAs, FAR 8.405-3(c) Ordering from BPAs applies.

- Orders at or below the micro-purchase threshold. The ordering activity may place orders at or below the micro-purchase threshold with any BPA holder that can meet the agency needs. The ordering activity should attempt to distribute any such orders among the BPA holders.
- Orders exceeding the micro-purchase threshold but **not exceeding** the simplified acquisition threshold. The ordering activity must provide each multiple-award BPA holder a fair opportunity to be considered for each order exceeding the micro-purchase threshold, but not exceeding the simplified acquisition threshold unless one of the exceptions at 8.405-6(a)(1)(i) applies. The ordering activity need not contact each of the multiple-award BPA holders before placing an order if information is available to ensure that each BPA holder is provided a fair opportunity to be considered for each order. The ordering activity contracting officer shall document the circumstances when restricting consideration to less than all multiple-award BPA holders offering the required supplies and services.
- Orders exceeding the simplified acquisition threshold. The ordering activity shall place an order in accordance with FAR 8.405-3(c)(2)(iii)(A)(1),(2) and (3), unless the requirement is waived on the basis of a justification that is prepared and approved in accordance with FAR 8.405-6. The ordering activity shall provide an RFQ to all BPA

holders, afford all BPA holders responding to the RFQ an opportunity to submit a quote; and fairly consider all responses received.

- The ordering activity shall develop a statement of objective or performance work statement for each order under the BPA. Ordering activities should place these orders on a firm-fixed price basis to the maximum extent practicable. For time-and-materials and labor-hour orders, the contracting officer shall follow the procedures at 8.404(h). All orders under the BPA shall specify a price for the performance of the tasks identified in the statement of objective or performance work statement. The ordering activity is responsible for considering the level of effort and the mix of labor proposed to perform a specific task being ordered, and for determining that the total price is reasonable through appropriate analysis techniques, and documenting the file accordingly.

The BPAs contain labor categories and a minimum discount percentage that will be applied to the BPA holder's current Schedule contract pricing at the time the order is issued. Orders under the BPAs shall include the Schedule contract number, SISS BPA number, current Schedule contract labor category title/training/item, current Schedule contract rates, current BPA discount percentage and resulting rate/price, and any additional order-specific discount and resulting price. Refer to FAR 8.406-1 for other information to be included on orders.

2.5 Evaluation

After the RFQ closes, evaluate all responses received using the evaluation criteria specified in the RFQ and select the BPA holder that represents the best value. The ordering activity is responsible for considering the level of effort and the mix of labor proposed to perform a specific task and for determining that the total price is reasonable. After award, provide timely notification to unsuccessful offerors. If an unsuccessful offeror requests information on an award that was based on factors other than price alone, provide a brief explanation of the basis for the award decision.

Price Reductions

Ordering activities are encouraged and empowered to seek further price reductions.

2.6 Award

Place the order as you would for any other Schedule task order in accordance with FAR 8.405.

Documentation:

In accordance with the BPA and FAR 8.405-2(f), ordering activities shall document the following:

- The BPA holder receiving the order and all BPA holders considered
- Description of what was purchased and agreed upon pricing
- The evaluation methodology used in selecting the BPA holder
- The rationale for any tradeoffs used in making the selection
- The price reasonableness determination required by FAR 8.405-2(d)
- The rationale for using other than a firm-fixed price, or performance-based order

- When an order exceeds the simplified acquisition threshold, evidence of compliance with the ordering procedures at [8.405-2\(c\)](#)

2.7 Task Order Administration

The SISS BPA requires that the ordering contracting officer use all standard task order administration practices such as:

- Surveillance and monitoring;
- Performance Assessment;
- Timely invoicing processes.

All travel must be pre-approved by the ordering activity, shall include no fee, and must be in accordance with the agency's travel regulations, policies, and procedures.

Reporting requirements at the SISS BPA level are:

- **Task Order Award Notifications.** The BPA holder shall provide email notification to the GSA BPA CO and GSA COR within 5 calendar days of all new task orders awarded under the BPAs. The notification shall include a brief description of the task, name of the acquiring entity, period of performance, and estimated dollar value. In addition, the BPA holder shall provide one complete electronic copy of each order, including the statement of work.
- **Quarterly Status Report.** The Quarterly Status Report (QSR) shall consist of high level and detailed information for each awarded task order. The BPA holder shall electronically update and submit the quarterly status report to the GSA BPA CO and GSA BPA COR. Reports are to be submitted no later than 15 workdays after the end of each calendar year quarter. BPA holders with no task orders awarded during the quarter are required to submit an email notification to the GSA BPA CO and GSA BPA COR stating that there is no quarterly status report.
- **Performance review.** GSA will submit OMB performance reviews based upon the Quarterly Status Report, and will work with Agency COs to identify any other information needed once the format of the OMB report is finalized.

3.0 Roles and Responsibilities

SISS BPA CO

The SISS BPA CO has the overall responsibility for managing and administering the SISS BPA, as well as the following:

- Providing administrative procedures guidance for placing orders
- Monitoring base year and option year periods of performance
- When the aggregate dollar value of orders is reached at each tier shown above, the GSA BPA CO will execute a unilateral modification to increase the BPA discount percentage by the amount shown for that tier
- Ensuring fair opportunity is given to all vendors
- Consolidate and prepare Quarterly Status Report

Agency Ordering CO

The agency ordering CO is responsible for the following:

- Serves as the local contracting focal point for coordination and award of BPA Calls
- Ensures BPA Call requirements are within the SISS BPA scope, rates and terms
- Make certain BPA Call request packages are properly prepared and provide all required information
- Coordinating BPA call requests with the SISS BPA CO, or designated points of contact as required, in order to monitor and track purchasing limits
- Providing copies to the SISS BPA CO of all BPA Calls awarded against this agreement
- Preparing vendor performance reports are required

CORs

COs may delegate authority to a COR. This authority typically encompasses the following:

- Accomplish day-to-day surveillance of vendor performance
- Inform the CO of any potential performance problems
- Prepare and submit to the CO a written evaluation of the vendor's performance upon completion of a BPA Call as necessary
- Review invoices in comparison to actual performance accomplished

The **Agency Ordering CO** should consider the nomination submitted by the requiring activity that identifies a federal government employee who is technically qualified and trained to become a COR

Awarded vendors have assembled skilled teams that will support the development of quality services for Government users. Table 1 shows the BPA holder and any Contractor Team Arrangement:

Table 1: BPA Holder and Contractor Team Arrangements

Vendor <i>Vendor Team</i>	Schedule Contract Number	BPA Number
Accenture	GS-35F-0371N	GS00Q16AEA1000
Acumen (lead) <i>Excella Consulting</i> <i>Carahsoft Technology</i>	GS-35F-0287P <i>GS-35F-0115R</i> <i>GS-35F-0119Y</i>	GS00Q16AEA1001
Capgemini	GS-35F-0601M	GS00Q16AEA1002
Deloitte	GS-35F-0617L	GS00Q16AEA1003
Phase One	GS-35F-0130U	GS00Q16AEA1004
PwC	GS-35F-0263P	GS00Q16AEA1005

4.0 Master CLIN Structure:

Table 2 is the Aggregate Discount Percentage Table – **additional discount % varies by vendor.**

Table 2: Aggregate Discount Percentage Table

Tier Number (Do not modify)	Aggregate Dollar Amount (Do not modify)	Additional Discount % (Insert discount rate)
Aggregate Tier 1 discount trigger	\$2 million	1.00%
Aggregate Tier 2 discount trigger	\$5 million	*

Tier Number (Do not modify)	Aggregate Dollar Amount (Do not modify)	Additional Discount % (Insert discount rate)
Aggregate Tier 3 discount trigger	\$8 million	*
Aggregate Tier 4 discount trigger	\$10 million	*

When the aggregate dollar value of orders is reached at each tier shown above, the GSA BPA CO will execute a unilateral modification to increase the BPA discount percentage by the amount shown for that tier. Regarding Contractor Team Arrangements (CTAs), this modification will be executed for each BPA member under a CTA. For example, if the initial BPA discount were 5% and Tier 1 shows an additional discount of 2%, the BPA discount would increase to 7% from that point forward until the next tier is reached. The next tier would result in an increased discount added to the then current BPA discount of 7% and so on for each subsequent tier reached. While each member of a CTA can have different initial BPA discount percentages, the additional discount percentages shown in the table above apply to each team member.

5.0 Sharing via GSA Labs

This BPA actively supports FITARA by establishing standards that make it possible for agencies to reuse and share existing applications and community portals in support of tens of thousands of users. In the spirit of the Shared Platform principle (US Digital Government Strategy), GSA is encouraging agencies to share the Salesforce applications, code, and best practices they develop with the rest of the Federal community. To view government applications already shared for your agency's reuse, please visit GSA Labs at labs.gsa.gov.

What is GSA Labs?

GSA Labs is a community where government agencies can share Salesforce apps, code, and best practices. It is designed to maximize the collective thought leadership across the entire Government.

Why GSA Labs?

The goal of GSA Labs is to be a single place where Government agencies can tap into the collective knowledge of our Salesforce community, hence making us all better, faster, and more secure in everything we do.

Interested in Getting Involved with the Salesforce Community?

Getting involved is easy. All you have to do is self-register at labs.gsa.gov with a .gov or .mil email address. Go to <http://labs.gsa.gov> and click on “Sign Up” to fill out your information and register.