SINGLE AWARDEE INDEFINITE DELIVERY INDEFINITE QUANTITY (IDIQ)
PERFORMANCE WORK STATEMENT
SALESFORCE PROFESSIONAL SERVICES

1.0 OVERVIEW/BACKGROUND

The Bureau of the Fiscal Service (Fiscal Service), a bureau of the U.S. Department of the Treasury (Treasury), is responsible for promoting the financial integrity and operational efficiency of the U.S. government through exceptional accounting, financing, collections, payments, and shared services.

Our goal is to help transform financial management and delivery of shared services in the federal government. We strive to be a valued partner for agencies as they work to strengthen their financial management and focus on their missions.

The Fiscal Service strives each day to meet the needs of our customers by delivering exceptional products and services. Since 2014, Fiscal Service has adopted Salesforce.com as the Customer Relationship Management (CRM) tool to improve customer communications and engagement.

The purpose of the Salesforce Implementation, Integration, and Support Services IDIQ initiative is to provide best value to Treasury. The resulting acquisition vehicle will be available for Fiscal Service Offices. This IDIQ will be established for the creation of Task Orders based on objectives as outlined by the Government for integrator support services on the Salesforce platform.

The objective of this acquisition is to provide a streamlined method for Fiscal Service Offices to procure expert services on an agile basis for the Salesforce implementation, integration and support services. These services may include building complex workflows, approval processes, communities, case and knowledge management solutions, portals and platform application development. These services will be epitomized by driving towards the delivery of quality product within rapid time frames through the utilization of the Salesforce platform to create applications with consistent architecture following standard Salesforce development guidelines to promote reuse and shareability of all code and functionality across government in alignment with the Federal Digital Government Strategy 'Shared Platform Approach' to "build once, use many times.

Furthermore, the need is to obtain a commercial-class service that includes the following:

  a. Utilizing comprehensive, objective metrics that provide accountability with consistent and transparent measures, including incentives to reward outstanding accomplishments that benefit the agency and disincentives when performance fails to meet requirements.
  b. Leveraging technology capabilities to meet customer needs with timely and seamless access to the cloud-based infrastructure, business applications, and data. This includes staying abreast of new Salesforce software-as-a-service (SaaS) product offerings, platform features, and innovative ways to provide technology value to agency customers.
  c. Minimizing resource requirements and operational costs with management practices and technologies that maximize operational efficiencies.
  d. Implementing non-proprietary business applications that are based on an iterative process utilizing UX Design & Agile software development methods and repeatable processes, while maintaining flexibility to satisfy unplanned urgent customer needs and ad hoc requests.
  e. Maximizing agility and responsiveness in deploying enhancements, upgrades, and new technology applications that enhance capabilities and meet the continually evolving needs of clients.
  f. Development and implementation of verification and validation processes that provide a high level of assurance that all service requests are completed according to established requirements.
  g. Provide customer-friendly support services and training that meet the needs of the end- users.
  h. Establish and maintain a standardized process for enterprise-wide management of releases into the production environments to include all documentation required.
  i. Cultivation of positive, trusting, and cooperative working relationships with the Government and other vendors that support the agency.
  j. Participation in and establishment of agency's Salesforce Center of Excellence and associated activities. A Salesforce Center of Excellence is the governance framework that drives the execution of processes by

which organizations identify, prioritize, assist, execute optimally leveraging people, processes, knowledge base, and technology.

k. Regularly advise the Government on emerging technologies, tools, applications, and recommendations for improving the implementation of an agency's Salesforce platform and related cloud technology ecosystem.

2.0 SCOPE OF WORK

Under this IDIQ, the Contractor shall perform a broad range of 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.

In summary, the scope of work functional/ordering areas are as follows:

a. Functional Area 1: UX Design, Business Analysis, Development, Integration
b. Functional Area 2: Data Management and Securitization
c. Functional Area 3: Program Management Support and Center of Excellence (COE) Governance
d. Functional Area 4: Operations and Maintenance and Release Management Support
e. Functional Area 5: Support / Help Desk
f. Functional Area 6: Training

In detail, the scope of work functional/ordering areas are as follows:

2.1 <u>Functional Area 1: UX Design, Business Analysis, Development, Integration</u> - Creation of a technical architecture leading to the development of business applications, including integration with the existing systems. This includes expansion or updates to existing production applications to meet the ongoing, unique objectives and requirements of specific components.

Sample activities that would typically fall under Functional Area 1 are:

a. Design solutions toward the end user experience so that products produced meet end user goals and measure of success as well as the strategic business objectives of the providing organization;

b. Work with stakeholders and technology professionals to properly understand business requirements and develop an industry best practice approach to technology solutions;

c. Provide subject matter expertise for the Salesforce Apex coding language or Visual Force page development;

d. Develop, test, stage, and release business applications by applying iterative processes utilizing the proposed Agile methodology and a frequent release cycle;

e. Provide customer-friendly open source solutions that provide ease of use for non-technical Government users;

f. Provide support and integration services for agency approved 3rd party products to enhance the digital experience;

g. Ensure commercial best practices workflows shall come bundled with the solutions;

h. Design solutions that offer role-based identity management, authorization, and authentication across all business applications;

i. Ensure all content and activities are traceable to specific persons;

j. Ensure all content is preserved according to federal record retention requirements and

applications have the ability to protect personally identifiable information (PII);

k. Ensure applications are developed such that response times for application end users fall within best practice levels;

l. Provide comprehensive documentation and information necessary to analyze processes, procedures, and/or policies that were implemented in the creation of the applications;

m. Provide secure mechanisms to allow data exchange and interaction with external systems through Application Programming Interfaces (APIs) or other methods;

n. Provide business process analysis expertise with regard to optimizing the utilization and adoption of the software platform among government users;

o. Seek to configure out-of-the-box aspects of the selected platform before recommending a customized coding approach;

p. Develop system configuration in such a manner as to leverage maximum re-use and sharing across the platform by other federal agencies;

q. Provide full technical and end-user documentation 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;

r. Be equipped to support an enterprise-wide, multi-org Salesforce ecosystem, providing analysis and solution architecture recommendations considering functional overlap and reuse of objects or utilities

s. Rapidly deploy new or improved independent site features without requiring changes or downtime to unrelated site features;

t. Design and implement system changes in a manner to support interoperability and scalability with future development efforts and in an open architecture manner; and

u. Allow the government to publish all source code or software artifacts for reuse in an open source manner.

2.2 <u>Functional Area 2: Data Management and Security</u> – Data management and security may include database architecture, data import/export tasks, data migration efforts, security with a Government provided third-party encryption tool, and creation of policy and/or procedures surrounding data implementation. In addition, providing system security expertise to support Salesforce security assessments.

Sample activities that would typically fall under Functional Area 2 are:

a. Provide database architecture subject matter expertise for the Salesforce and Force.com platforms;

b. Include database performance and impact in all system design or development efforts to ensure industry best practices are supported;

c. Work with third-party cloud encryption gateway technologies, if present, provided by the government to secure designated data while in transit to/from the cloud as well as at rest;

d. Work with security in the creation of policy and/or procedures surrounding data implementation including the correction of application security vulnerabilities within 24 hours;

e. Verify in writing to the Government that data migrated from any legacy system to the new

Salesforce application 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;

    f.   Be knowledgeable in data warehousing, data visualization and business intelligence best practices to provide guidance on data architecture and mapping;

    g.   Provide systems and data integration and orchestration services between Salesforce and other systems of record or data warehouses; and

    h.   Provide system security support during security reviews and application or platform assessments. Work may include development of security documentation to support an Authority to Utilize (ATU) or Authority to Operate (ATO).

2.3   Functional Area 3: Program Management Support and Center of Excellence Governance- Provide the government program management and center of excellence governance support for managing applications on an enterprise-wide platform.

Sample activities that would typically fall under Functional Area 3 are:

    a.   Give periodic project, program, and operational status updates as required by the government within an agreed-upon frequency and schedule. These are typically weekly or monthly Call status reports and weekly Agile/Scrum development meetings.

    b.   Provide on-site project management support and attend in-person meetings on an ad-hoc basis;

    c.   As part of the COE support, the contractor provide enterprise-wide platform architectural design, centralized design review of configuration and code prior to release, and support of the most current Salesforce / Force.com implementation best practices, features and functions;

    d.   Provide project and operational documentation as required by the government to support specific project deliverables or ongoing operational support such as security Authority to Operate;

    e.   Manage and oversee daily, weekly, and monthly workloads and schedule for active tasks with regard to schedule, budget, priority, risk, and quality to ensure quality response to government Call requests;

    f.   Provide programmatic support for the agency's Center of Excellence or governing body, including application portfolio management and engagement with Enterprise Architecture, developing strategic roadmaps, creation of executive-level briefings, support in developing OMB capital planning reports, managing the new request intake and governance process, license management, and facilitating recurring program meetings; and

    g.   Provide knowledge transfer at the end of each call to either the government and/or other contractors providing current and/or future Salesforce deployments, integrations and ongoing support.

2.4   Functional Area 4: Operational and Maintenance and Release Management Support – The contractor shall provide Release Management at the enterprise-level and if applicable, at the application level. The contractor shall provide enterprise-level operational and maintenance (O&M) support on the platform and if applicable, application specific support.

Sample activities that would typically fall under Functional Area 4 are:

    a.   Identify usability issues and craft solutions to resolve bug fixes or other performance problems;

    b.   Advise and provide recommendations of how new manufacturer-driven updates of the platform shall be affected or upgraded according to manufacturer release schedules;

    c.   Provide enterprise-wide release management support for releases, configuration changes, and out-of-cycle emergency releases of code and configuration to higher environments, including production environments;

    d.   Provide enterprise-wide release management support for incremental feature releases, configuration changes, and expedited code changes from development through production environments;

    e.   Provide development environment management expertise, regression testing, and continuous integration management including the administration of the systems and tools that are used as part of that process;

    f.   Provide system security support during security and governance reviews and application or platform assessments. Work may include development of security documentation to support an Authority to Utilize (ATU) or Authority to Operate (ATO) for Salesforce products or for third-party products that support Salesforce; and

    g.   Provide level of effort and best practice recommendations to support Treasury when evaluating potential new functionality on the platform; occasionally delivering prototypes to support enterprise governance and decision-making processes.

2.5   <u>Functional Area 5: System and End-User Support / Help Desk</u> - Provide support & help desk functions for software development support or application support to end users.

Sample activities that would typically fall under Functional Area 5 are:

    a.   Utilize a centralized bug and issue tracking system designated and hosted by the government, unless otherwise proposed and provided by the contractor;

    b.   Provide weekly reporting and metrics on issue tracking and resolution; and

    c.   Act as an escalation point for break/fix items as reported by the government. This may require working with end users and the platform vendor as necessary to define, document, test, and address incidents.

2.6   <u>Functional Area 6: Training</u> - Providing training support to improve user adoption and self-sufficiency.

Sample activities that would typically fall under Functional Area 6 are:

    a.   Develop, utilize, and maintain process flow diagrams, guidelines and other reference materials to assist in troubleshooting problems and resolving outages quickly;

    b.   Provide role-based training solutions for users to become proficient in the business applications, including content creation, content maintenance, review, and approval processes;

    c.   Provide "train-the-trainer" solutions;

    d.   Create, update, or revise and review Knowledge Management practices, procedures, or documents;

e. Provide training on any integrated Third-Party Salesforce Solutions;

f. Provide the Government with training on any custom objects either created and/or configured so as government staff is self-sustaining if applicable; and

g. Provide Salesforce Instructor Led training virtually or in a classroom setting.

3.0 PLACE(S) OF PERFORMANCE

The place of performance under the IDIQ may be a Government site or a Contractor site within the continental United States.

Under certain appropriate circumstances, and for certain types of service requirements, Treasury may consider telework as an option for contractor personnel. The option of remote performance will only be granted upon completion of all necessary training and approvals as required. The possibility of remote performance will be addressed at the Task Order level.

4.0 PERIOD OF PERFORMANCE

The period of performance shall be for a base period of 12 months and four (4) 12-month option periods beginning on the effective date of the award.

5.0 ACQUISITION TYPE

The Government anticipates awarding a single awardee Indefinite Delivery Indefinite Quantity (IDIQ) contract with fully loaded firm-fixed labor rates. Task Orders will be issued based on the needs of the Government at firm-fixed prices.

6.0 CONTRACTOR MINIMUM QUALIFICATIONS

The Contractor and/or their partnering organization collectively (i.e. Teaming Partner(s), Subcontractors) shall:

a) have a minimum of 5 years of experience in Salesforce consulting in the same scope, and the ability to manage large scale, centralized releases and Agile development portfolios.
b) have the capabilities to manage implementations within complex, multi-org government cloud ecosystems,
c) have relevant experience in the past three years at federal government organizations which have multiple customer types and data models (Shared Service partners; Federal Program Agencies, and the Public);
d) be a Salesforce certified or registered partner;
e) should be able to support many active applications, hundreds of users, and external communities, and
f) shall be able to implement applications, platform and products utilizing End User (UX) Design thinking and Agile Software Development processes that achieve results through continuous capability enhancements, minimal downtime, prompt response to emerging needs, demonstrated reliability, and optimized performance with resource utilization minimized.

7.0 KEY PERSONNEL AND PERSONNEL MINIMUM QUALIFICATIONS

The Government defines "key personnel" as the individual(s) (i.e. project manager) who will be accountable for overseeing and possibly completing some of the work that the Government requires under this task order that if they were not in place then the work would not be successfully completed.

7.1 Project Manager: The Contractor's key personnel for a Project Manager shall

a. have 3-5 years of experience in project management methodologies,
b. have industry recognized project management certifications, such as Project Management Professional (PMP); Scrum Master; or Project Management certificates from accredited institutions, and

    c.   have current knowledge of Treasury, Shared Service provider organizations, or organizations with similar customer experience data models;

    d.   have experience managing low code implementations on the Force.Com platform.

7.2   **Senior Salesforce Solution Architect:** The Contractor's key personnel for a Senior Solution Architect shall

    a.   have 3 years of experience implementing Salesforce solutions for previous federal agency customers, inclusive of
        i.   Experience implementing Salesforce as an enterprise IT solution for a minimum of two federal agencies, and
        ii.   Experience designing and deploying system integrations and interrelated workflows

    b.   possess a broad, demonstrated knowledge, expertise and experience in developing integrated Salesforce applications applying industry best practices to provide a seamless transition and transfer of data through networks of business applications and users, and

    c.   Salesforce Certifications (minimum of 5 of the following):
        i.   Salesforce Application Architect
        ii.   Salesforce Platform Developer I
        iii.   Salesforce Platform Developer II
        iv.   Salesforce Administrator
        v.   Salesforce Data Architecture and Management Specialist
        vi.   Salesforce Sharing and Visibility Designer
        vii.   Salesforce Sales Cloud
        viii.   Salesforce Service Cloud
        ix.   Salesforce App Builder

7.3   Additional and/or other specific key personnel may be designated at the individual Task Order level.

8.0   KEY PERSONNEL REPLACEMENT PROCESS

Key personnel may, with the consent of the contracting parties, be amended from time to time during the course of the contract to add or remove key personnel. A formal modification is only required when the key personnel are specifically named in the contract. This process only applies to the extent that the contract does not otherwise specify notice or personnel replacement obligations.

8.1   GOVERNMENT REQUEST

The Government may require replacement of key personnel in the instance of non-performance, misconduct, or alleged misconduct whose continued use under a contract is contrary to the best interests of the Government. Circumstances that support a request for replacement include but are not limited to performance that is inconsistent with the contract performance work statement (PWS), terms and conditions, or violations of Federal laws, regulations, or agency conduct standards. The Contracting Officer's Representative (COR) will give written notice to the Contractor of the need for substitution, including the circumstances surrounding the request for replacement. In accordance with FAR Part 1.602-2(b), the Contracting Officer (CO) will ensure the Contractor receives impartial, fair, and equitable treatment; however, the CO is not required to investigate or validate allegations or wait until a final resolution of the circumstances surrounding the request for replacement before requiring substitution of key personnel.

Within twenty-four (24) hours of receiving notice, the Contractor shall respond to the Government's request to replace key personnel and provide key personnel replacement resume(s) to the COR(s). Resume(s) shall be provided and demonstrate that the qualifications of proposed replacement key personnel are of equal or greater qualifications than the key personnel they are replacing. If the Contractor is unable to provide such a replacement, the COR and/or CO may accept a replacement that meets the minimum qualifications stated in the PWS and the CO may also negotiate an accompanying equitable price reduction. The COR will notify the Contractor, in writing, within forty-eight (48) hours of receiving key personnel replacement resume(s)

if the Contractor provided replacement personnel is acceptable. The Government reserves the right to disapprove the proposed substitute(s) and negotiate with the Contractor for other key personnel replacement(s). Any Contractor replacement of key personnel must be done in consultation with the COR. The process for replacing key personnel as described above does not suspend the Contractor's obligation to continue performance under the contract.

8.2   CONTRACTOR REQUEST

If the Contractor must substitute key personnel, the Contractor shall provide written notice to the COR and the CO two (2) calendar weeks before the proposed replacement date, whenever possible. At a minimum, the Contractor shall provide the Government with notice forty-eight (48) hours before replacement. The only exception to the forty-eight (48) hour notice is death, incapacitation, abrupt termination, or resignation from employment of key personnel where the Contractor's notice was less than forty-eight (48) hours. If the deadline for providing notice falls on Friday after 5:00 pm, a weekend, or on a Federal Holiday, the Contractor shall provide notice the next business day if more than forty-eight (48) hours. The notice shall state the circumstances necessitating the proposed substitution of the key personnel and shall provide resume(s) of proposed replacement key personnel for review and consultation. The Contractor shall provide resumes which demonstrate the qualifications of the proposed substitute(s) are of equal or greater qualifications than the key personnel they are replacing. If the Contractor is unable to provide such a replacement, the COR and/or CO may accept a replacement that meets the minimum qualifications stated in the PWS and the CO may also negotiate an accompanying equitable price reduction. The Government reserves the right to disapprove the proposed substitute(s) and negotiate with the Contractor for other key personnel replacement(s). Assignment of key personnel must be done in consultation with the COR.

9.0.   GOVERNMENT RESPONSIBILITY, FURNISHED FACILITIES, SERVICES, AND INFORMATION

9.1 The Government will identify their responsibilities at the individual Task Order level when necessary.

9.2 The Government will provide Government-Furnished Property (GFP) at the individual Task Order level when necessary; however, in most cases the Government will make available to the Contractor on-site space and/or access to resources (such as network and system access, computing equipment, and information) necessary for completing the service requirements. It is anticipated that the Contractor will be required to use government-furnished computers to access government networks/systems.

The Contractor shall be responsible and accountable for all Government property. This includes Government property in the possession or control of subcontractor(s). The Contractor shall establish and maintain a control system in accordance with FAR subpart 45.5 to control, preserve, and maintain all Government property in its possession. The Contractor shall submit a Government Property Inventory Report as needed.

   a) Accountability for Government Property - All property furnished by the Government under this contract shall remain the property of the Government. Upon termination of the contract, the Contractor shall render an accounting of all such property that has come into his/her possession under this contract. Any property furnished by the Government to fulfill contract requirements which is lost or damaged, resulting from improper use or negligence by the Contractor's employees, will be repaired or replaced by the Government and the cost of repairs or replacement will be deducted from the Contractor's invoice. In the event that Government property is malfunctioning, the appropriate Government personnel shall be notified immediately.

   b) Use of Government Property - Government property (to include telephone) shall be used for official Government business only in the performance of this contract. Government property will not be used in any manner for any personal advantage, business gain, or other personal endeavor by the Contractor or the Contractor's employees.

   c) Safeguarding Government Property - The Contractor shall take all reasonable precautions, as directed by the government, or in the absence of such direction, in accordance with sound industrial practices, to safeguard and protect Government property.