

FINAL

REQUEST FOR QUOTE

ENTERPRISE COLLABORATION

AND

CUSTOMER RELATIONSHIP MANAGEMENT

CORRESPONDENCE SYSTEM IMPLEMENTATION

BPA Task Order 0001

Dated:

Request for Quote Overview- Task Order 0001:

The _____ intends to award an initial Task Order under the Multiple Award Blanket Purchase Agreement for Development Support Services to support the implementation of the Enterprise Collaboration platform and the Customer Relationship Management System (CRM) Application.

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Section A: Statement of Objective

1. Introduction and Overview

2. Objective

The objective of this task order is to utilize the Agile development process to establish the Enterprise Collaboration platform as the primary workflow application for various components and to develop a Customer Relationship Management (CRM) application. The purpose of the CRM application will be to maintain a centralized view of all interactions and outreach to citizens through various methods. This new system will replace all critical and major businesses processes supported today by the legacy CRM system.

This system must be fully operational and be able to support all critical components by October 01, 2013. Critical components are defined in Appendix C as “must have” features and major business components are defined as “should have” and “nice to have.” All additional major business components shall be completed by the end of the period of performance as proposed in the resulting Performance Work Statement and Roadmap.

3. Scope

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

- Initial system design and implementation
- System configuration to support business processes
- Integration for input and output methods
- Configuration to support cloud encryption gateway technology
- Data import of records collected from legacy systems
- Training of end users on new system

Scope *does not* include:

- workstations, data centers, server systems, and connectivity
- Supporting Legacy applications/systems

4. Period and Place of Performance

The period of performance start date of the acquisition is 07/01/2013.

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

5. 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 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. 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 AFDO 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. They are contingent on continued Government requirements and funding availability for the Enterprise Collaboration platform or 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.

6. Technical Overview

a. 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.

The current system supports roughly 576 end users.

b. Stakeholders

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

Technical Lead/Product Owner: Will manage and communicate with the stakeholder community, is capable of making business decisions rapidly and setting priorities, will participate in iterative planning sessions and will remove obstacles to project success.

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.

7. Required Tasks

a. Task 1: Initial Enterprise Collaboration System Configuration and Implementation

Objective: Contractor shall provide the agency with a secure, stable, records compliant, commercial collaboration, workflow enabled Enterprise Collaboration Platform.

- i. The contractor shall design the system for maximum interoperability across all components and offices to ensure flexibility in leveraging the system for future applications.
- ii. The contractor shall approach system design in as “off-the-shelf” (COTS) a manner as possible with focus on preventing or minimizing system customization.
- iii. The contractor shall configure the following system instances to support tiered code-release separation and quality assurance testing methodology:

Instance Name	Description and Purpose
Development	<p>Description: The <i>Development</i> 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.</p> <p>Purpose: To provide isolated system instance(s) for active development and/or Unit Testing.</p> <p>User-base: Integrator development team and infrequently the Integrated Project Team as required.</p> <p>Availability: The <i>Development</i> instance(s) shall not be bound to any Service Level Agreement and may be subject to maintenance and upkeep on an as-needed basis.</p> <p>Feature Set: The <i>Development</i> instance(s) shall run the code version required for active development.</p>

	<p>Data: The <i>Development</i> instance(s) shall dummy data such that it is rendered non-sensitive and non-specific for the purposes of development.</p>
Staging	<p>Description: The <i>Staging</i> 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.</p> <p>Purpose: To separate User Acceptance Testing and Training activities from Unit Testing or Production activities.</p> <p>User-base: Integrator development team, the Integrated Project Team, and designated users for testing and training as required.</p> <p>Availability: The <i>Staging</i> 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.</p> <p>Feature Set: The <i>Staging</i> 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.</p> <p>Data: The <i>Staging</i> instance shall include masked, truncated, or redacted agency data such that it is rendered non-sensitive for the purposes of testing and training.</p>
Production	<p>Description: The <i>Production</i> instance shall be a system supporting the work of active <i>Production</i> instance users.</p> <p>Purpose: To separate development and testing activities from actual government business processes and records.</p> <p>User-base: The integrator’s development team, the Integrated Project Team, and the <i>Production</i> user community within the Agency.</p> <p>Availability: The <i>Production</i> instance shall be available for user access in accordance with the service level agreement for the platform.</p> <p>Feature Set: The <i>Production</i> instance shall run the current version of the production code feature set after a release to production. The <i>Production</i> and <i>Recovery</i> instances must run the same code version at all times.</p> <p>Data: The <i>Production</i> 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 <i>Production</i> instance should be complete, comply with Federal Records Act (FRA) requirements, be backed up in accordance with</p>

	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	<p>Description: The <i>Recovery</i> instance shall be an entirely separate, hot fail-over system to support the work of the <i>Production</i> instance users in the event of an outage or inaccessible <i>Production</i> instance.</p> <p>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 <i>Production</i> instance.</p> <p>User-base: The integrator’s development team, the Integrated Project Team, and the <i>Production</i> user community.</p> <p>Availability: The <i>Recovery</i> instance shall be available for user access in accordance with the service level agreement for the platform.</p> <p>Feature Set: The <i>Recovery</i> instance shall run the current version of the production code feature set after a release to production. The <i>Production</i> and <i>Recovery</i> instances must run the same code version at all times.</p> <p>Data: The <i>Recovery</i> 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 <i>Recovery</i> instance should be complete, comply with the 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.</p>

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

b. Task 2: CRM Application Design and Implementation

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

- 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 (Gifts, 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
10. Highly customized printed correspondence in batches.

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

- ii. 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.
- iii. The contractor shall ensure the system is configured to support expansion for additional requirements.
- iv. The contractor shall configure the system in a way to support “Open Source” publishing

c. Task 3: Integration for Input and Output Methods

Objective: The CRM application shall be able to accept and distribute high volumes of correspondence from and to various sources:

- i. The contractor shall configure the system to receive “hard mail” files scanned and uploaded to the system.
- ii. The contractor shall configure the system to receive electronic faxes as typical SMTP e-mails.
- iii. The contractor shall configure the system to support high quality printing for the Production and Greetings departments.
- iv. The contractor shall configure the system to provide bulk and automated e-mail by groups, lists, or individuals to support Newsletter functionality.
- v. The contractor shall configure the system to support a universal unsubscribe function for constituents.
- vi. The contractor shall configure the system to receive “hard mail” files scanned and uploaded to the system:
 1. The high capacity scanners used for this function are Hard mail scanning:
 2. Hard mail items shall be processed by optical character recognition (OCR) and pre-populated with available data such as name, address, and subject etc., in a similar manner as entries are ingested from web forms.
- vii. The contractor shall configure the system to receive electronic faxes as typical SMTP e-mails.
 1. Fax items shall be processed by optical character recognition (OCR) and pre-populated with available data such as name,

address, and subject etc., in a similar manner as entries are ingested from web forms.

- viii. The contractor shall configure the system to support high quality printing production including:
 - 1. Supporting printing through local printer entries only
 - 2. Support for various letter, letterhead, and envelope types as prescribed by the government
- ix. Bulk and automated e-mail by groups, lists, or individuals to support Newsletter functionality including:
 - 1. Reply-to addresses
 - 2. Whitelist support with major e-mail spam filter organizations
 - 3. Analytics for click-through, open rates, bounce back reporting
 - 4. Support A-B newsletter testing

d. Task 5: 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.

- i. The contractor shall analyze, assist with exports, de-duplicate/scrub, prepare, and import data that has been collected from legacy systems including:
 - 1. 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
- ii. 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
- iii. All legacy system data must be imported, validated, and certified within 3 months of system activation.

e. 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.

- i. 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
- ii. The contractor shall provide initial end-user training on a per-department basis during the initial on-boarding of users to the new system.
- iii. The contractor shall provide “train-the-trainer“ classes for selected trainers and administrators.

8. Constraints

9. Deliverables

The contractor shall ensure proper control and coordination of all deliverables as proposed in the work plan to ensure they are on time.

Unless otherwise stated, the Government will review deliverables and notify the contractor of findings within 10 workdays. Representatives of the contractor shall meet with the COR and other member of the Government as necessary as to review status and other deliverables.

SECTION B: Instructions to Offerors

10.1 SUBMISSION OF QUOTES

Quotes shall be submitted by 12:00 noon Eastern Standard Time on.

Quotes shall be submitted to the

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
- Product Roadmap
- Notional Quality Control Plan

10.2 SECTION I - TECHNICAL SUBMISSION

The Technical submission shall include the following:

- FACTOR 1 – Performance Work Statement (PWS)
- FACTOR 2 – Product Development Roadmap
- FACTOR 3 – Notional Quality Control Plan
- Technical Assumptions, Conditions or Exceptions

10.3 FACTOR 1 – Performance Work Statement

Offerors shall provide a Performance Work Statement (PWS) in response the Statement of Objectives and this RFQ. The proposed solution shall include an explanation of how project and contract management, communication/collaboration with the Government, security requirements, documentation, and reporting will function in conjunction with the proposed Agile methodology.

10.4 FACTOR 2 – Product Development Roadmap

Offerors shall propose an Agile product development roadmap which correlates how the stated objective aligns with the timeframe for implementation and the offeror's proposed Agile methodology. The product development roadmap shall demonstrate where testing, training, security, and cut over planning, will be included.

10.5 FACTOR 3 – Notional Quality Control Plan (QCP)

Offerors shall describe the QC and Performance Measurement approach, including how proposed performance standards will be monitored, evaluated, and reported. The purpose of the notional QCP is to provide evaluators with an understanding of how measures and metrics will be applied based on the proposed technical solution.

10.6 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.

10.6 SECTION II – PRICE

The price quote shall include the following:

- Firm, fixed price for the effort required
- Supporting documentation
- Assumptions, conditions, and exceptions

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

Supporting Documentation: The price quote shall provide supporting documentation to backup the pricing proposed. This shall demonstrate the correlation between the proposed technical solution in the PWS and the pricing submitted.

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.

Section C: Evaluation of Offers

11.1 Evaluation and Method of Award

This task order will be awarded to the Enterprise Collaboration Platform Development Services Blanket Purchase Agreement award holder that can provide the services that represent 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-Product Roadmap, and Factor 3-Notional Quality Control Plan

11.2 FACTOR 1 – Performance Work Statement

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

11.3 FACTOR 2 – Product Development Roadmap

The Government will assess the proposed Agile roadmap to determine if it demonstrates an understanding of the complexity of the effort and how the stated objective aligns with the objectives and timeframe for implementation and the offeror's proposed Agile methodology. The Product Roadmap shall demonstrate where testing, training, security, cut over planning, etc. will be included.

11.4 FACTOR 3 – Notional Quality Control Plan (QCP)

The proposed QCP will evaluate the rationale for the proposed performance standards and performance measurement methodology and assess whether the total solution will ensure that the performance standards are met.

11.5 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.

11.5 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.

11.5.1 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.

ALTERNATIVE EVALUATION CRITERIA EXAMPLES:

Pricing: In order to determine best value – pricing for this effort is required to be on unit of measure that is equivalent to the proposed sprint/iteration/release cycle as proposed in the SOW. The technical solution for sizing, iteration time, and throughput must correlate to the proposed pricing.

Backup Documentation: The price quote shall provide backup documentation to support the pricing proposed. This shall demonstrate the correlation between the proposed technical solution in the PWS and the pricing submitted. This shall include any standard definitions that will apply to the Agile unit of measure described.

FACTOR 1 – Performance Work Statement

Offeror shall provide a Performance Work Statement (PWS) in response the Statement of Objectives for Award Term Option 2. The proposed solution shall include an explanation of how project and contract management, communication/collaboration with the Government, security requirements, documentation, and reporting will function in conjunction with the proposed Agile methodology.

For this effort, the PWS shall clearly illustrate how the process through which Agile Development of software in small iterations lasting two to five weeks results in usable software. Each iteration is defined as a development cycle which includes planning, requirement analysis, design, coding, testing, quality assurance and documentation all meet the offeror’s proposed “Definition of Done”.

The deliverables under this PWS are to have functionality scheduled for an available release without defects which the developers can present to the stakeholders in the project. In order to meet this goal, fixed price units shall be developed to provide the repeatable framework from which future users stories can be placed. The resulting proposed “units” will be “fixed time” and “fixed price” but will not have “fixed scope”.

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.

The Offeror shall provide a notional release schedule which maps the proposed sprint/iteration cycle to the calendar Period of Performance. This release schedule shall include relevant governance process checkpoints such as Technical Reviews and Sprint Releases as well as Agile methodology functions such as Sprint Planning, Sprint Review, and Sprint Retrospectives.

FACTOR 2 – Notional Quality Control Plan (QCP)

Offeror shall update the Quality Control and Performance Measurements based on the previously agreed upon metrics as established under Award Term Option 1. The purpose of the notional

QCP is to provide the agency with an understanding of how measures and metrics will be applied based on the proposed technical solution. These metrics shall cover planning, inspecting, and understanding progress under time. The metrics shall correspond with the “definition of done” as proposed in the PWS. These metrics should be proposed based on the current throughputs and sprints as developed under Award Term Option 1. They should indicate an “Acceptable” quality level and an “Excellent” quality level to correspond to the Award Term determination.