BPHC Salesforce CRM System Support Services Volume 3 – Past Performance

September 3, 2021

Submitted To:
HRSA - BPHC
Office of Acquisition
Management and Policy
5600 Fishers Lane
Rockville, MD 20857-5600

Submitted By:
TechSur Solutions LLC
205 Van Buren Street,
Suite 20,
Herndon, VA 20170
www.techsur.solutions
Tel: (571) 442-3664

Point of Contact:
Rupinder Yadav
[President]
205 Van Buren Street, Suite 20,
Herndon, VA 20170
rupinder@techsur.solutions
contracts@techsur.solutions
Tel: (703) 584-4283

TECHSUR

Delivering Amazing Results

205 Van Buren Street, Suite 120
Herndon, VA 20170
Tel: (571) 442-3664
www.TechSur.Solutions

September 3, 2021

Mr. Pradeep Nair, Contracting Specialist
Office of Acquisition Management and Policy

Health Resources and Services Administration (HRSA)
Bureau of Primary Health Care (BPHC)
5600 Fishers Lane
Rockville, MD 20857-5600

Subject: Response to RFQ 75R60221Q00287 for BPHC Salesforce CRM System Support

Dear Ms. Nair,

TechSur Solutions (TechSur) is pleased to submit this quote to the HRSA in response to the subject Request for Quote (RFQ). TechSur welcomes this opportunity to establish its partnership with HRSA in support of the BPHC Salesforce CRM System Support Services. TechSur takes no exceptions to the RFQ terms and conditions. Per the requirements, our proposal includes a three-part submittal:

- Volume I   Technical Quote
- Volume II   Price Quote
- Volume III   Past Performance

Requested Information

- RFQ Number: 75R60221Q00287
- Project Title: BPHC Salesforce CRM System Support Services
- Company: TechSur Solutions LLC
- Address: 205 Van Buren Street, #120, Herndon, VA 20170
- GSA MAS: 47QTCA20D00C6
- TIN: 81-3563670
- DUNS: 080386655
- Quote Validity: This quote is valid for 90 calendar days from the date of submission.

If you have any questions, please feel free to contact me at 703-584-4283 or rupinder@TechSur.solutions or Amit Yadav, CTO, at 571-442-3664 or amit@TechSur.solutions.

Sincerely,

Rupinder Yadav
President

VOLUME 3 – PAST PERFORMANCE

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HEALTH RESOURCES AND SERVICES ADMINISTRATION (HRSA)
OFFICE OF ACQUISITION MANAGEMENT AND POLICY (OAMP)
PAST PERFORMANCE QUESTIONNAIRE

Solicitation #: 75R60221Q00287   **Solicitation Title:** Bureau of Primary Health Care (BPHC) Salesforce Customer Relationship Management (CRM) System Support Services

Due Date 08/30/2021 **Time:** 5:00 p.m. EST

Email completed questionnaire to HRSA/OAMP at PNair@hrsa.gov

<u>Client/Reference</u>: Our organization is currently responding to the above solicitation. The Government is placing increased emphasis in its acquisition process on past performance as a source selection factor and is requiring that clients of firms responding to HRSA solicitations be identified and their participation in the evaluation process be requested. Since this information will be used as one of the evaluation factors for contract award, we are requesting that this questionnaire be completed and returned, via email, directly to the email address listed above, no later than the due date and time stated.

Contractor Name: TechSur Solutions

EVALUATOR INFORMATION

☒ Private Sector Client   ☐ State/Local Government Client   ☐ Federal Client

Name: REI Systems

Address: 45335 Vintage Park Plaza

Sterling	VA	20166
City	**State**	**Zip Code**

Project Title: USCIS - Outcome-Based Delivery and DevOps Services (ODOS) II

Contract Number/Order Number: TechSur Subcontract#: E2009-2018-ODOS-TS
     REI Systems Prime Contract/Order: HSHQDC-14-D-E2009 / 70SBUR18F00000704

Period of Performance (all years): 04/05/2019 – 09/03/2021	**Total Contract Value (including base & all options):** $7,008,068
Government or Commercial Contracting Officer's Representative (COR) Contact Name: Kevin White Title: Director of Contracts Phone number: (703) 230-0011 Email: kwhite@reisystems.com	**Government or Commercial Project Manager Contact** Name: Pradeep Krishnanath Title: Director Phone number: 703.579.7882 Email: pkrishnanath@reisystems.com

Project Description: Supporting the U.S. Citizenship and Immigration Services (USCIS) Electronic Immigration System (ELIS) program, TechSur provides Agile Teams well-versed in delivering in a DevSecOps environment. TechSur's scope of work includes Technical Lead and Agile Team lead roles covering User Experience (UX) design; full stack system and software development; architecting cloud native solutions with microservice frameworks; test automation; operations and maintenance; and database services. With 25% workshare, the largest subcontractor percentage, TechSur Agile Teams perform development, enhancement, and sustainment. The services they provide support mission-critical benefit administration services used by 19,000 government employees and contractors working at 223 offices worldwide, notably USCIS headquarters in Washington, DC, 4 service centers, 29 district offices, 136 application support centers, and 4 regional offices. TechSur's Teams use cloud computing, Platform as a Service (PaaS), Infrastructure as a Service (IaaS), and Continuous Integration/Continuous Delivery (CI/CD) pipelines to deliver functional and business capability to USCIS quickly. Services include modernizing a monolithic application to a microservices architecture; developing new modules to help decommission legacy systems; maintaining and enhancing existing modules; and innovating around a CI/CD software development pipeline used by 200+ developers to build, test, and deploy code to production daily.

Program Management: As the largest subcontractor, TechSur's provides technical and program leadership across the Agile Teams, enabling a highly productive environment and increased velocity of business values delivery. In addition to leading Agile Teams, TechSur's Technical Lead supports the Management Team in ensuring service delivery quality and the strategic approach to realizing the business roadmap. He has regular touch points with directorate leadership and Product Owners, delivering progress updates and reviewing risks and significant obstacles. TechSur Team members work with USCIS to establish product strategy and the roadmap to productize ELIS benefit administration and align the roadmap with business needs. To develop, nurture and retain T-shaped resources, TechSur cross-trains functional and technical resources, allowing them to enhance their expertise with newer technologies and frameworks. Each team has a Team Lead, who leads product implementation, and a Technical Lead, who supports weekly risk reviews with program leadership and other risk management functions.

System and Software Development: TechSur's cross-functional ELIS team members include full stack engineers, business analysts, and testers across six Agile Teams in a DevSecOps environment. Each team consists of functional and technical T-shaped resources, combining skills in Agile process management, business analysis, UX design, full stack engineering, DevSecOps automation, and automated testing. Empowered as owners of product quality and their own process, TechSur team members deliver products from conceptualization, requirement definition, development, testing, deployment, and operations and use Agile processes to manage and implement business features. Teams use Agile ceremonies like daily standups and retrospectives to self-manage efforts. They track requirements in backlogs and perform regular backlog grooming. The Teams use Jira and Confluence as primary management tools and Slack to collaborate. The Teams support DevSecOps pipelines using zero-trust and security-first philosophies, with multistage checks including Twistlock and Fortify to detect and prevent software vulnerabilities from being deployed to Production.

Architecture, Engineering, and Design: TechSur based its ELIS engineering practices on the 12 Factor App methodology and the US Digital Services playbook. Teams employ microservices with cloud-native platforms such as AWS and OpenShift to design highly available, scalable systems. Teams encrypt data in transit and at rest and follow OWASP guidelines to design secure systems. They use mTLS for secure, trusted integration between USCIS services and ELIS integration with external systems. They follow engineering principles standardizing development of each service, feature, and release. These same principles ensure code peer review before the Team merges pull requests into downstream locked branches. Teams use open source tools and deliver vendor-agnostic solutions where applicable. TechSur designed Data Governance policies and data standards across ELIS program implementation. They use Java, Angular, Oracle and Postgres as key foundational technologies. These are hosted on an AWS, using cloud services such as EC2, S3, and KMS. They use open source frameworks, tools, and libraries like ActiveMQ, Chef, Jenkins, Cucumber, Docker, Eclipse, Gradle, Hibernate, Hygieia, Java, Junit, Kafka, Kong, Liquibase, Nexus, Oauth, OWASP, PostgreSQL, Spring Framework, and Terraform as well as best of breed capabilities such as Confluence, GitHub Enterprise, JIRA, OpenShift Enterprise, Oracle, Twistlock, Slack, and WebInspect.

Past Performance Questionnaire   **Attachment ___**

PART 1: GENERAL PERFORMANCE

Instructions: Please rate each of the following areas based on the evaluation scale included in Appendix A. Definitions for the performance areas to be rated are included in Appendix B. Other evaluation areas that are unique to the contract or that cannot be captured elsewhere should be added to the table. Lines 7-9 are in the table for this purpose, but additional lines can be added by references. Space to include comments to support ratings is provided in the 'Comments' section.

Performance Areas	Exceptional	Very Good	Satisfactory	Marginal	Unsatisfactory	N/A
1. Quality of Product/Service	☐	☐	☐	☐	☐	☐
2. Schedule	☐	☐	☐	☐	☐	☐
3. Cost Control	☐	☐	☐	☐	☐	☐
4. Business Relations	☐	☐	☐	☐	☐	☐
5. Management of Key Personnel	☐	☐	☐	☐	☐	☐
6. Utilization of Small Business	☐	☐	☐	☐	☐	☐
7. Other Area -	☐	☐	☐	☐	☐	☐
8. Other Area -	☐	☐	☐	☐	☐	☐
9. Other Area -	☐	☐	☐	☐	☐	☐

Overall Recommendation	Definitely Would	Probably Would	Might or Might Not	Probably Would Not	Definitely Would Not
Given the contractor's ability to execute the contract requirements, I would award another contract to this firm/organization.	☐	☐	☐	☐	☐

Comments:

APPENDIX A - PAST PERFORMANCE RATINGS

The Federal Government uses the Contractor Performance Assessment Reporting System (CPARS) to document contractor performance information that is required by Federal Regulations. Past performance information entered into CPARS is available to Federal agencies to review relevant performance and integrity information before making an award decision. The ratings and definitions used in this questionnaire are identical to those used in CPARS.

Rating	Definition
Exceptional	Performance meets contractual requirements and exceeds many to the Government's benefit. The element being assessed was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective.
Very Good	Performance meets contractual requirements and exceeds some to the Government's benefit. The element being assessed was accomplished with some minor problems for which corrective actions taken by the contractor were effective.
Satisfactory	Performance meets contractual requirements. The element being assessed contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory.
Marginal	Performance does not meet some contractual requirements. The element being assessed reflects a serious problem for which the contractor has not yet identified corrective actions.
Unsatisfactory	Performance does not meet most contractual requirements and recovery is not likely in a timely manner. The element being assessed contains a serious problem(s) for which the contractor's corrective actions appear or were ineffective.

APPENDIX B – PERFORMANCE AREA DEFINITIONS

The Federal Government uses the Contractor Performance Assessment Reporting System (CPARS) to document contractor performance information that is required by the Federal Acquisition Regulations. The performance areas and definitions used in this questionnaire are identical to those used in CPARS.

Quality of Product/Service – Assess the contractor's conformance to contract/order requirements, specifications and standards of good workmanship (e.g., commonly accepted technical, professional, environmental, or safety and health standards). For example: Are reports/data accurate? Does the product or service provided meet the specifications of the contract/order? Does the Contractor's work measure up to commonly accepted technical or professional standards? Assess the degree of customer (Government or Commercial) technical direction required to solve problems that arise during performance.

For Operations Support: Assess how successfully the contractor meets program quality objectives such as ability to produce, reliability, maintainability and ability to inspect. The evaluator must be flexible in how contractor success is measured; e.g., using data from field reliability and maintainability and failure reports, user comments, and acceptance rates, and scrap and rework rates. Did the contractor demonstrate continuous improvement, quality and reliability leadership that reflects progress in quality management?

Schedule – Assess the timeliness of the contractor against the competition of the contract, task orders, milestones, delivery schedules, and administrative requirements (e.g., efforts that contribute to or effect the schedule variance).
This evaluation of the contractor's adherence to the required delivery schedule should include the contractor's efforts during the evaluation period that contributes to or effects the schedule variance. This element applies to contract/order closeout activities as well as contract performance. Instances of adverse actions such as assessment of liquidated damages, or issuance of Cure Notices, Show Cause Notices, and Delinquency Notices are indicators of problems which may have resulted in variance to the contract/order schedule and should therefore be noted in the evaluation.

Cost Control (Not required for Firm Fixed Price or Firm Fixed Price with Economic Price Adjustment) – Assess the contractor's effectiveness in forecasting, managing, and controlling contract/order cost. For example, does the contractor keep within the total estimated cost (what is the relationship of the negotiated costs and budgeted costs to actuals)? Did the contractor do anything innovative that resulted in cost savings? Were billings current, accurate and complete? Are the contractor's budgetary internal controls adequate?

Business Relations – Assess the integration and coordination of all activity needed to execute the contract/order, specifically the timeliness, completeness and quality of problem identification, corrective action plans, proposal submittals, the contractor's history of reasonable and cooperative behavior (to include timely identification of issues in controversy), customer satisfaction, timely award and management of subcontracts.
Include, as applicable, information on the following:
- Is the contractor oriented toward the customer?
- Is interaction between the contractor and the customer satisfactory or does it need improvement?
- Include the adequacy of the contractor's accounting, billing, and estimating systems and the contractor's management of customer property if a substantial amount of property has been provided to the contractor under the contract/order.
- Address the timeliness of awards to subcontractors and management of subcontractors, including subcontract costs. Consider efforts taken to ensure early identification of subcontract problems and the timely application of corporate resources to preclude subcontract problems from impacting overall prime contractor performance.

- Assess the prime contractor's effort devoted to managing subcontracts and whether subcontractors were an integral part of the contractor's team.

Management of key Personnel (Applicable when the contract/order contains a Key Personnel clause) – Assess the contractor's performance in selecting, retaining, supporting, and replacing, when necessary, key personnel.

For example, how well did the contractor match the qualifications of the key position, as described in the contract/order, with the person who filled the key position/ Did the contractor support key personnel so they were able to work effectively? If a key person did not perform well, what action was taken by the contractor to correct this? If a replacement of a key person was necessary, did the replacement meet or exceed the qualifications of the position as described in the contract/order schedule?

Utilization of Small Business (Applicable only to Government contracts with small business clauses) – FAR subpart 19.7 and 15 U.S.C. 637 contain statutory requirements for complying with the Small Business subcontracting Program. Assess whether the Contractor provided maximum practicable opportunity for Small Businesses to participate in contract/order performance consistent with efficient performance of the contract/order.

Assess compliance with all terms and conditions in the contract/order relating to Small Business participation (including FAR 52.219-8, Utilization of Small businesses and FAR 52.219-9, small business Subcontracting Plan (when required)). Assess any Small Business participation goals, to include AbilityOne goals, which are stated separately in the contract/order. Assess achievement on each individual goal stated within the contract/order of subcontracting plan including good faith effort if the goal was not achieved.

TECHSUR

2 Implementation, Rollout, Training, and Production Support of Grants Management System (GovGrants) build on Salesforce CRM for Government agencies and Non-Profit organizations

HEALTH RESOURCES AND SERVICES ADMINISTRATION (HRSA)
OFFICE OF ACQUISITION MANAGEMENT AND POLICY (OAMP)
PAST PERFORMANCE QUESTIONNAIRE

Solicitation #: 75R60221Q00287   **Solicitation Title:** Bureau of Primary Health Care (BPHC) Salesforce Customer Relationship Management (CRM) System Support Services

Due Date 09/03/2021 **Time:** 5:00 p.m. EST

Email completed questionnaire to HRSA/OAMP at PNair@hrsa.gov

<u>Client/Reference</u>: Our organization is currently responding to the above solicitation. The Government is placing increased emphasis in its acquisition process on past performance as a source selection factor and is requiring that clients of firms responding to HRSA solicitations be identified and their participation in the evaluation process be requested. Since this information will be used as one of the evaluation factors for contract award, we are requesting that this questionnaire be completed and returned, via email, directly to the email address listed above, no later than the due date and time stated.

Contractor Name: Stealth Solutions, Inc.

EVALUATOR INFORMATION

☒ Private Sector Client   ☐ State/Local Government Client   ☐ Federal Client

Name: Mayank Jain, Senior Project Manager, REI Systems

Address: 45335 Vintage Park Plaza

Sterling	VA	20166
City	State	Zip Code

Project Title: Implementation, Rollout, Training, and Production Support of Grants Management System (GovGrants) build on Salesforce CRM for Government agencies and Non-Profit organizations.

Contract Number/Order Number: __Not Applicable__

Period of Performance (all years): 01/2021 – 12/2021	**Total Contract Value (including base & all options)**: $612,320
Government or Commercial Contracting Officer's Representative (COR) Contact Name: _____ Title: _____ Phone number: _____ Email: _____	**Government or Commercial Project Manager Contact** Name: Mayank Jain Title: Senior Project Manager Phone number: (703) 956-8784 Email: mjain@reisystems.com

Project Description:

Stealth Solutions supports REI Systems with the implementation of REI Grants Management System GovGrants build on the Salesforce CRM platform.

Stealth is supporting numerous clients, including but not limited to Los Angeles Homeless Services Authority (LAHSA), National Endowment for Democracy (NED), City of San Diego. In addition, Stealth's assistance has resulted in streamlining of business processes and improved user experience and system adoption.

The projects include supporting the integration, implementation, and testing of multiple applications on the Salesforce platform. The applications include Case Management, Customer Relationship Management, Grants Management, and e-signature. Effective systems integration was accomplished through modifications of the Salesforce standard platform through complete project management oversight and critical responsibilities of business analysis, design, and software development of the customized solution. Additionally, developed user stories were used for testing and quality assurance of the integrated developed solution.
Stealth is responsible for the following tasks:

1. **Project Management** – Entails preparing a project management plan, schedule for multiple and iterative releases, meeting with stakeholders across different government programs, tracking activities across SOW, leading weekly and monthly status meetings, reporting, and risks & issues monitoring and mitigation.
2. **Salesforce Configuration and Customization** – Stealth will be intrinsically involved in eliciting business requirements, codifying user stories, estimation, architecture and design, development, testing, and rollout activities that included preparing training material, videos, and delivering training.
3. **Post-Production Support** – Projects are implemented using Agile approach where built functionality is released iteratively. Once the System is in Production, Stealth is actively involved in post-production support addressing Tier 1 and Tier 2 issues across projects to ensure the System's successful adoption. Stealth also interfaces with Salesforce for Tier 3 support and making sure Salesforce release and patches do not impact the built functionality.

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Past Performance Questionnaire   **Attachment ___**

PART 1: GENERAL PERFORMANCE

Instructions: Please rate each of the following areas based on the evaluation scale included in Appendix A. Definitions for the performance areas to be rated are included in Appendix B. Other evaluation areas that are unique to the contract or that cannot be captured elsewhere should be added to the table. Lines 7-9 are in the table for this purpose, but additional lines can be added by references. Space to include comments to support ratings is provided in the 'Comments' section.

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Overall Recommendation	Definitely Would	Probably Would	Might or Might Not	Probably Would Not	Definitely Would Not
Given the contractor's ability to execute the contract requirements, I would award another contract to this firm/organization.	☐	☐	☐	☐	☐

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3   Grants Management System Implementation for Region of Peel, Canada

HEALTH RESOURCES AND SERVICES ADMINISTRATION (HRSA)
OFFICE OF ACQUISITION MANAGEMENT AND POLICY (OAMP)
PAST PERFORMANCE QUESTIONNAIRE

Solicitation #: 75R60221Q00287   **Solicitation Title:** Bureau of Primary Health Care (BPHC) Salesforce Customer Relationship Management (CRM) System Support Services

Due Date 09/03/2021 **Time:** 5:00 p.m. EST

Email completed questionnaire to HRSA/OAMP at PNair@hrsa.gov

<u>Client/Reference</u>: Our organization is currently responding to the above solicitation. The Government is placing increased emphasis in its acquisition process on past performance as a source selection factor and is requiring that clients of firms responding to HRSA solicitations be identified and their participation in the evaluation process be requested. Since this information will be used as one of the evaluation factors for contract award, we are requesting that this questionnaire be completed and returned, via email, directly to the email address listed above, no later than the due date and time stated.

Contractor Name: Stealth Solutions, Inc.

EVALUATOR INFORMATION

☒ Private Sector Client   ☐ State/Local Government Client   ☐ Federal Client

Name: Raj Kanakamedala, Director, Amiti Consulting Corporation

Address: 20745 Williamsport Pl., Suite 350

Ashburn	VA	20147
City	**State**	**Zip Code**

Project Title: Grants Management System Implementation for Region of Peel, Canada

Contract Number/Order Number: __AMITIGMS42-51_____

Period of Performance (all years)**:** 03/2019 – 04/2020	**Total Contract Value (including base & all options)**: AMITIGMS42-51
Government or Commercial Contracting Officer's Representative (COR) Contact Name: Title: Phone number: Email:	**Government or Commercial Project Manager Contact** Name: Title: Phone number: Email:

Project Description:

Stealth Solutions, Inc. (Stealth) has supported end-to-end implementation, training and adoption fo the systems,and post-production customer help desk support services of an electronic Grants Management System for the Human Services Department at the Region of Peel in Canada, which plays a critical role in expanding social services to more than 1,400,000 residents within the Region.

Historically, the Region of Peel has managed grant programs using various legacy systems and manual processes, which vary by funding program where technology solutions were acquired per business need. The Region was seeking a cost-effective **single technology platform** that converges disparate technologies and creates efficiencies for the organization related to infrastructure, solution interoperability, and transferable staff skills that enable a more effective and efficient future platform-based solution rollout.

Stealth provided the lead in working with the customer to determine existing customer to citizen experiences with a gap analysis performed to determine proper software customizations for the developed solution. Stealth implemented a cloud-based Software as a Service (SaaS) solution built on the Salesforce platform that was customized and configured to meet the needs of several Region of Peel programs while being flexible enough to accommodate new grant programs. The implemented solution has supported the Region's strategic objective of leveraging technology for operational efficiencies and has converged legacy systems and manual processes with a flexible and configurable single Salesforce-based solution that eliminates the need for hardware, software, disaster recovery, and backups. Additionally, the implemented solution is scalable, works on any device, and was extended using the AppExchange product DocVerify to support Digital Signature.

Stealth engagement included the following tasks:

1. Project Management – Entails preparing a project management plan, schedule for multiple and iterative releases, meeting with stakeholders across different government programs, tracking activities across SOW, leading weekly and monthly status meetings, reporting, and risks & issues monitoring and mitigation.
2. Salesforce Configuration and Customization – Stealth will be intrinsically involved in eliciting business requirements, codifying user stories, estimation, architecture and design, development, testing, and rollout activities that included preparing training material, videos, and delivery of training.
3. Post-Production Support – System was implemented using Agile approach where built functionality was released iteratively. After the initial release, Stealth was actively involved in post-production support addressing Tier 1 and Tier issues to ensure the System's successful adoption. Stealth also interfaced with Salesforce for Tier 3 support and making sure Salesforce release and patches did not impact the built functionality.
4. Security and Health of Salesforce Org – System was deployed on Govementcloud to meet Region of Peel security requirements, and we supported activities from the Government security team to ensure compliance. Additionally, Stealth PM ensured all resources went through appropriate security training from the Government and kept their credential up-to-date.

Past Performance Questionnaire   **Attachment ___**

PART 1: GENERAL PERFORMANCE

Instructions: Please rate each of the following areas based on the evaluation scale included in Appendix A. Definitions for the performance areas to be rated are included in Appendix B. Other evaluation areas that are unique to the contract or that cannot be captured elsewhere should be added to the table. Lines 7-9 are in the table for this purpose, but additional lines can be added by references. Space to include comments to support ratings is provided in the 'Comments' section.

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3. Cost Control	☐	☐	☐	☐	☐	☐
4. Business Relations	☐	☐	☐	☐	☐	☐
5. Management of Key Personnel	☐	☐	☐	☐	☐	☐
6. Utilization of Small Business	☐	☐	☐	☐	☐	☐
7. Other Area -	☐	☐	☐	☐	☐	☐
8. Other Area -	☐	☐	☐	☐	☐	☐
9. Other Area -	☐	☐	☐	☐	☐	☐
Overall Recommendation	Definitely Would	Probably Would	Might or Might Not	Probably Would Not	Definitely Would Not
Given the contractor's ability to execute the contract requirements, I would award another contract to this firm/organization.	☐	☐	☐	☐	☐

Comments:

APPENDIX A - PAST PERFORMANCE RATINGS

The Federal Government uses the Contractor Performance Assessment Reporting System (CPARS) to document contractor performance information that is required by Federal Regulations. Past performance information entered into CPARS is available to Federal agencies to review relevant performance and integrity information before making an award decision. The ratings and definitions used in this questionnaire are identical to those used in CPARS.

Rating	Definition
Exceptional	Performance meets contractual requirements and exceeds many to the Government's benefit. The element being assessed was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective.
Very Good	Performance meets contractual requirements and exceeds some to the Government's benefit. The element being assessed was accomplished with some minor problems for which corrective actions taken by the contractor were effective.
Satisfactory	Performance meets contractual requirements. The element being assessed contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory.
Marginal	Performance does not meet some contractual requirements. The element being assessed reflects a serious problem for which the contractor has not yet identified corrective actions.
Unsatisfactory	Performance does not meet most contractual requirements and recovery is not likely in a timely manner. The element being assessed contains a serious problem(s) for which the contractor's corrective actions appear or were ineffective.

APPENDIX B – PERFORMANCE AREA DEFINITIONS

The Federal Government uses the Contractor Performance Assessment Reporting System (CPARS) to document contractor performance information that is required by the Federal Acquisition Regulations. The performance areas and definitions used in this questionnaire are identical to those used in CPARS.

Quality of Product/Service – Assess the contractor's conformance to contract/order requirements, specifications and standards of good workmanship (e.g., commonly accepted technical, professional, environmental, or safety and health standards). For example: Are reports/data accurate? Does the product or service provided meet the specifications of the contract/order? Does the Contractor's work measure up to commonly accepted technical or professional standards? Assess the degree of customer (Government or Commercial) technical direction required to solve problems that arise during performance.

For Operations Support: Assess how successfully the contractor meets program quality objectives such as ability to produce, reliability, maintainability and ability to inspect. The evaluator must be flexible in how contractor success is measured; e.g., using data from field reliability and maintainability and failure reports, user comments, and acceptance rates, and scrap and rework rates. Did the contractor demonstrate continuous improvement, quality and reliability leadership that reflects progress in quality management?

Schedule – Assess the timeliness of the contractor against the competition of the contract, task orders, milestones, delivery schedules, and administrative requirements (e.g., efforts that contribute to or effect the schedule variance).
This evaluation of the contractor's adherence to the required delivery schedule should include the contractor's efforts during the evaluation period that contributes to or effects the schedule variance. This element applies to contract/order closeout activities as well as contract performance. Instances of adverse actions such as assessment of liquidated damages, or issuance of Cure Notices, Show Cause Notices, and Delinquency Notices are indicators of problems which may have resulted in variance to the contract/order schedule and should therefore be noted in the evaluation.

Cost Control (Not required for Firm Fixed Price or Firm Fixed Price with Economic Price Adjustment) – Assess the contractor's effectiveness in forecasting, managing, and controlling contract/order cost. For example, does the contractor keep within the total estimated cost (what is the relationship of the negotiated costs and budgeted costs to actuals)? Did the contractor do anything innovative that resulted in cost savings? Were billings current, accurate and complete? Are the contractor's budgetary internal controls adequate?

Business Relations – Assess the integration and coordination of all activity needed to execute the contract/order, specifically the timeliness, completeness and quality of problem identification, corrective action plans, proposal submittals, the contractor's history of reasonable and cooperative behavior (to include timely identification of issues in controversy), customer satisfaction, timely award and management of subcontracts.
Include, as applicable, information on the following:
- Is the contractor oriented toward the customer?
- Is interaction between the contractor and the customer satisfactory or does it need improvement?
- Include the adequacy of the contractor's accounting, billing, and estimating systems and the contractor's management of customer property if a substantial amount of property has been provided to the contractor under the contract/order.
- Address the timeliness of awards to subcontractors and management of subcontractors, including subcontract costs. Consider efforts taken to ensure early identification of subcontract problems and the timely application of corporate resources to preclude subcontract problems from impacting overall prime contractor performance.

- Assess the prime contractor's effort devoted to managing subcontracts and whether subcontractors were an integral part of the contractor's team.

Management of key Personnel (Applicable when the contract/order contains a Key Personnel clause) – Assess the contractor's performance in selecting, retaining, supporting, and replacing, when necessary, key personnel.
For example, how well did the contractor match the qualifications of the key position, as described in the contract/order, with the person who filled the key position/ Did the contractor support key personnel so they were able to work effectively? If a key person did not perform well, what action was taken by the contractor to correct this? If a replacement of a key person was necessary, did the replacement meet or exceed the qualifications of the position as described in the contract/order schedule?

Utilization of Small Business (Applicable only to Government contracts with small business clauses) – FAR subpart 19.7 and 15 U.S.C. 637 contain statutory requirements for complying with the Small Business subcontracting Program. Assess whether the Contractor provided maximum practicable opportunity for Small Businesses to participate in contract/order performance consistent with efficient performance of the contract/order.
Assess compliance with all terms and conditions in the contract/order relating to Small Business participation (including FAR 52.219-8, Utilization of Small businesses and FAR 52.219-9, small business Subcontracting Plan (when required)). Assess any Small Business participation goals, to include AbilityOne goals, which are stated separately in the contract/order. Assess achievement on each individual goal stated within the contract/order of subcontracting plan including good faith effort if the goal was not achieved.