

**Metropolitan Transportation Commission  
Operations Committee**

**June 10, 2022**

**Agenda Item 4b**

**Purchase Order Amendment - Salesforce Licenses: Carahsoft Technology Corp (\$339,500)**

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**Subject:**

Under this purchase order amendment, Carahsoft Technology Corp. (Carahsoft) would provide Salesforce licenses to develop and operate the regional and internal customer account management programs in Salesforce.

**Background:**

In December 2018, this Committee approved a purchase order with Carahsoft for Salesforce licenses for the Clipper® START means-based application process, account platform, and customer service system in Salesforce. In May 2021, this committee approved a purchase order amendment with Carahsoft for Salesforce licenses for the expanded Salesforce platform, which supports regional and internal customer account management program needs. The Salesforce platform currently provides the FasTrak case escalation management system, Clipper START application and customer service system, and the MTC/ABAG Contacts Center. Under development, MTC will soon launch the e-Bike Rebate application and customer service system, the MTC Help Desk system, and the Regional Transit Connection (RTC) discount card intake and verification system.

**Contract Actions:**

Staff recommends that the Operations Committee authorize the Executive Director or designated representative to amend the Salesforce Licenses Purchase Order with Carahsoft in an amount not to exceed \$339,500. Under this purchase order amendment, Carahsoft would provide Salesforce licenses for the regional and internal customer account management programs in Salesforce. Carahsoft's services were procured using CMAS (California Multiple Award Schedule) in compliance with MTC's procurement policies. Carahsoft is an authorized vendor under CMAS and is Salesforce's Master Value Added Reseller and Aggregator in the US public sector. Carahsoft is neither a small business nor a disadvantaged business enterprise and currently has no subcontractors.

**Issues:**

None identified.

**Recommendations:**

Staff recommends that the Operations Committee authorize the Executive Director or designee to issue a purchase order amendment to Carahsoft Technology Corp. in an amount not to exceed \$339,500 to continue to provide Salesforce licenses.

**Attachments:**

None.



Therese W. McMillan

## Request for Committee Approval

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### Summary of Proposed Purchase Order Amendment

Work Item No.: 8902, 1131, 1251, 6854, 1161

Consultant: Carahsoft Technology Corp.  
Reston, VA

Work Project Title: Salesforce licenses

Purpose of Project: To provide Salesforce licenses.

Brief Scope of Work: Provide Salesforce licenses to operate and enhance the Salesforce platform for regional and internal customer account management program needs.

Project Cost Not to Exceed: \$339,500 (this amendment)

Total purchase order before this amendment: \$360,777.12

Total authorized purchase order after this amendment: \$700,277.12

Funding Source: General Funds, STA, BATA, BAIFA, LCTOP

Fiscal Impact: \$339,500 is subject to approval of the FY 2022-23 MTC budget, as follows:

- FasTrak Case Management: \$17,000 – BATA
- Agency CRM Enhancement: \$112,500 – General Funds
- E-Bike Rebate: \$15,000 – BATA
- Clipper START: \$50,000 – LCTOP
- Express Lanes START: \$75,000 – BAIFA
- RTC: \$70,000 – STA

Motion by Committee: That the Executive Director or designee is authorized to issue a purchase order amendment to Carahsoft Technology Corp. to provide Salesforce licenses for the projects described above and in the Operations Committee Summary Sheet dated June 10, 2022 and that the Chief Financial Officer is authorized to set aside \$339,500 for such amendment, subject to necessary budgetary approvals.

Operations Committee:

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Carol Dutra-Vernaci, Chair

Approved:

June 10, 2022