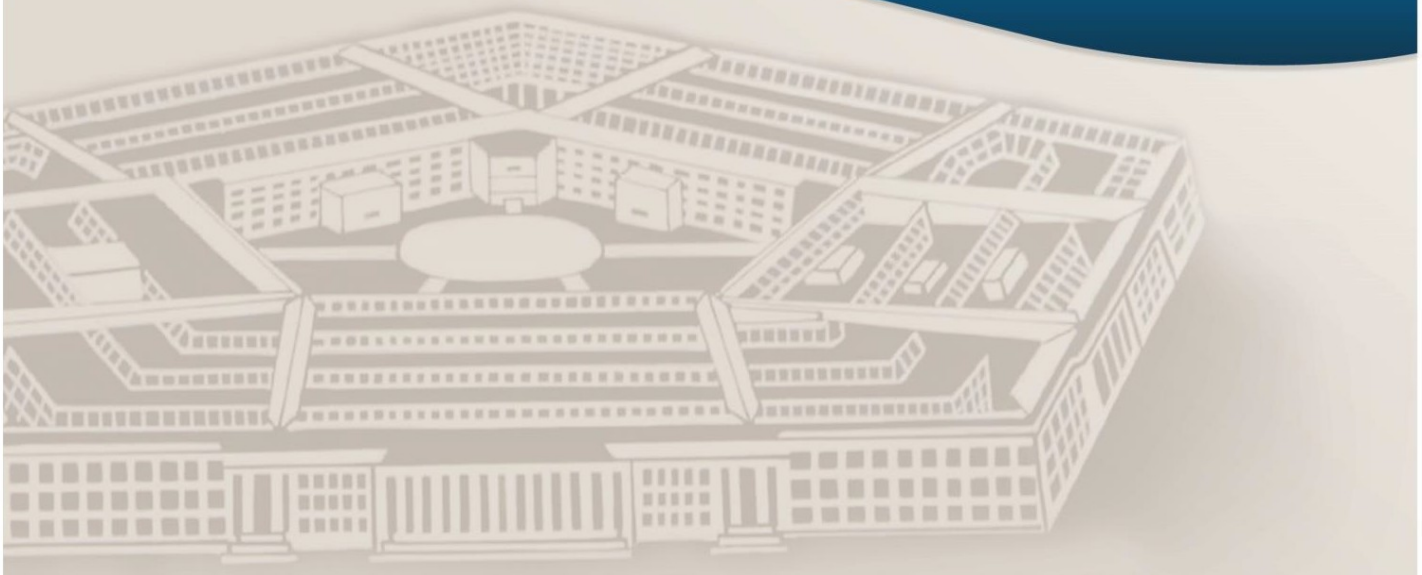


DoD ESI
ORDERING GUIDE

Gartner, Inc.

Blanket Purchase Agreement (BPA)

N66001-19-A-0049

www.esi.mil

Department of Defense Enterprise Software Initiative (DoD ESI) ORDERING GUIDE

This Ordering Guide has been developed by the DoD ESI team to assist IT buyers and contracting officials to order technology products and/or services from the DoD ESI Agreement holder. This Guide contains essential information about the DoD ESI Enterprise Agreement (EA), identifies the authorized users of the EA, summarizes the products and services available under the EA and instructions for users to place an order, and provides Points of Contact information for support.

Contents

1. General Information ..... Pg 2
2. Authorized Users ..... Pg 3
3. Products and Services Overview ..... Pg 3
4. Ordering Officer Responsibilities ..... Pg 4
5. Ordering Process ..... Pg 4
6. Points of Contact ..... Pg 7
7. External Award / Agreement ..... Pg 8

1. General Information

CONTRACT OR / VENDOR	**N66001-19-A-0049 / Gartner, Inc.**
GOVERNMENTWIDE ACQUISITION CONTRACT (GWAC) NUMBER (e.g. GSA, SEWP) AND WEB LINK	**GSA Contract No: 47QTCA18D008L** **View Gartner's GSA Contract:** https://www.gsaadvantage.gov/ref_text/47QTCA18D008L/0UCB01.3PKF3T_47QTCA18D008L_47QTCA18D008LPS0004.PDF
EA NUMBER AND WEB LINK	**N66001-19-A-0049** **www.esi.mil**
EA ISSUE DATE	**25 March 2019**
EA EXPIRATION DATE	**24 March 2029**

2. **Authorized Users**

a. DoD or Agencies

The EA is open for ordering by the "DoD Departments and Agencies" on a world-wide basis. "Departments and Agencies" are defined by the 48 Code of Federal Regulations, Section 202.101. In addition, "DoD or Agencies" includes the Intelligence Community (IC) and the U.S. Coast Guard. For the purposes of this EA, a DoD component is defined as follows: The Office of the Secretary of Defense (OSD), the Military Departments, the Chairman of the Joint Chiefs of Staff, the Unified Combatant Commands, the Inspector General of the Department of Defense (DoD IG), the Defense Agencies, the DoD Field Activities, the U. S. Coast Guard, Intelligence Communities (IC) and Foreign Military Sales (FMS) with a Letter of Authorization. If this EA is co-branded with GSA and is an OMB Designated Best in Class vehicle, it is open to all United States Federal Agencies.

b. GSA, Other Ordering Organizations, and Organizations

GSA or other applicable ordering agencies /organizations, ordering on behalf of the DOD and/or FMS, are authorized to place Orders under this EA and must comply with DFARS 208.74.

c. Contractors and Integrators

Government contractors performing work for a DoD Component (as defined above) may place Orders under this EA on behalf of and for the benefit of the DoD entity if authorized by their cognizant Contracting Officer in accordance with the requirements of FAR 51 and/or DFARS 251 as appropriate.

3. Products and Services Overview

Vendor	**Category**	**Service Line**
Gartner, Inc.	Research and Advisory Services	Research and Advisory Services
	Consulting Services	Consulting Services

(full list is available at www.esi.mil)

4. Ordering Officer Responsibilities

a. Ordering is decentralized. Only U.S. Government Contracting Officers, Government Purchase Card Holders, or Contractors given FAR 51 Authorization are able to place orders against this EA.

b. This EA was established competitively using the procedures under FAR 8.405-3. Refer to the DoD ESI website at www.esi.mil for the listing of the multiple award vendors.

c. The Ordering office must:

i. Comply with the ordering procedures of FAR 8.4 and DFARS 208.4;

ii. Obtain competition and/or execute and publish a brand name or limited source justification as applicable;

iii. Provide fair opportunity to all EA holders who offer the applicable product and/or service required;

iv. Ensure compliance with all fiscal laws prior to issuing an order under the EA;

v. Incorporate into the order any regulatory and statutory requirements that are applicable to the agency for which the order is placed, if pertinent requirements are not already included in the EA; [Note: The FAR and DFARS clauses listed in Attachment 1 of the EA are those in effect as of the effective date of the EA. Ordering Officers are responsible for incorporating the most current version of the applicable FAR and DFARS clauses, at the ordering level, in the Delivery Order as appropriate]

vi. Obtain the required authorization to acquire the products or services through the DoD ESI EA in accordance with FAR Part 51 when a contractor is ordering on behalf of a DoD component;

vii. Ensure the vendor selected for the order represents the best value. (Note that the EA terms encourage spot discounting.);

viii. Review the license terms and conditions when ordering software or proprietary appliances provided in the EA Attachments. If required, ordering offices may secure additional terms and conditions at the Order level if those terms and conditions do not conflict with those at the EA level and represent best value to the Government.

5. Ordering Process

a. DFARS Regulation 208.74

i. DFARS 208.74 requires authorized software buyers and requiring officials to review the DoD ESI website for DoD inventory or availability of an existing DoD ESI agreement before pursuing another acquisition method. DFARS procedures are:

1. After requirements are determined, review the information at the DoD ESI website to determine if the required product is available from DoD inventory. This can be done by visiting the DoD ESI website at www.esi.mil and selecting the "Agreements" tab. Choose the type of agreement for the product being ordered (Software, Hardware, Services or All) and check the inventory box. A list of EAs with DoD inventory will appear. If the product being ordered is on the list, the EA must be used to procure the product.

2. If the required commercial products or services are not available from inventory, but are available from an EA, buyers must follow the procedures in the DFARS Section 208.74 and DFARS PGI 208.7403.

3. If a DoD component must obtain the commercial products or services outside the DoD ESI EA, the component must seek a waiver from a management official designated by the DoD Component. After the steps in paragraphs (5)(i) and (5)(ii)(A) of the DFARS PGI 208.7403, Acquisition procedures have been completed.

4. If the required commercial products or services are not available from inventory or from an EA, the DoD component may use an alternate method of acquisition, subject to applicable laws and policy.

b. Ordering

i. All orders must be competed amongst the EA Holders unless an exception applies (see FAR 8.405-6 Limiting Sources).

ii. Orders are subject to the ordering office's local policy, the underlying Governmentwide Acquisition Contract (GWAC), if used, and the terms of the EA. The order may be placed directly with the vendor after ensuring compliance with the Ordering Officer Responsibilities specified in Section 4. The following is needed to place an order:

1. Execution of a delivery order (SF1449) by the respective local contracting office:

A. Contracting Officers will need to create an EA shell using their respective contract writing system in order to execute delivery orders against this EA (see section 7).

B. If the Contracting Officer does not use an automated contract writing system, enter the EA number N66001-19-A-0049 in Block 2 and a locally assigned delivery order number in Block 4. Note: Ensure you complete the FPDS-NG report.

2. Open Market items (i.e. not in the EA catalog) may be added to a EA call/delivery order for quoting purposes and shall be clearly labeled on the Quote as "Open Market". The following actions apply for Open Market items:

A. For Open Market items under the Micro-purchase threshold, an ordering officer may add this item to an individual EA call/delivery order without following the procedures in FAR 8.402(f). The items must be clearly labeled "OPEN MARKET" on the Order.

B. For Open Market items over the Micro-purchase threshold, the ordering officer will need to purchase the item(s) outside of the EA as a separate order using FAR and DFARS procedures as applicable to their purchase. The ordering activity will need to abide by FAR Parts 5 (Publicizing), Part 6 (Competition Requirements), Part 12, (acquisition of commercial items), Parts 13, 14, and 15 (contracting methods), and Part 19 (Small Business Program).

C. The completed SF1449 will be forwarded to the contractor with the following information:

Contractor / Vendor Information

Address:	Gartner, Inc. 56 Top Gallant Rd. Stamford, CT 06902
Remit To:	Gartner, Inc. Accounts Payable P.O. Box 911319 Dallas, TX 75391-1319
CAGE:	0EFU3
DUNS:	097220180
TIN:	04-3099750
Business Size:	Large

D. A copy of the SF1449 must be sent to the servicing DFAS center.

3. Government-Wide Purchase Card orders can be placed under this EA.

   A. Orders can be processed by contacting the Gartner Account Executive.

   B. Information Required from the Ordering Office:

      i. End User and Name

      ii. End User Email Address

      iii. End User Phone Number

iii. Ordering Period – If orders issued within the EA Ordering Period(s) include options, the order options may be exercised after the EA ordering date(s) provided that:

1. The initial order that includes the option was issued during the EA ordering period(s), and does not exceed 60 months past the expiration date of the EA;

2. The Ordering Office determines that the underlying GWAC is still valid at the time the order option is exercised and still includes the applicable products, and
3. The Ordering Office satisfies all other applicable regulations for exercise of the option.

6. Points of Contact

a. Contracting Office

	Procuring Contracting Officer (PCO)	**Contract Specialist**
POC	Spencer Sessions	Ian Manahan
Telephone	619-553-4523	619-553-3841
Email	spencer.sessions@navy.mil	ian.manahan@navy.mil

b. Software Product Manager (SPM)

	Software Product Manager (SPM)	**Alternate Point of Contact**
POC	John Bojorquez	Nick Thomas
Telephone	619-553-2849	619-553-6918
Email	john.bojorquez1@navy.mil	nicholas.a.thomas2@navy.mil

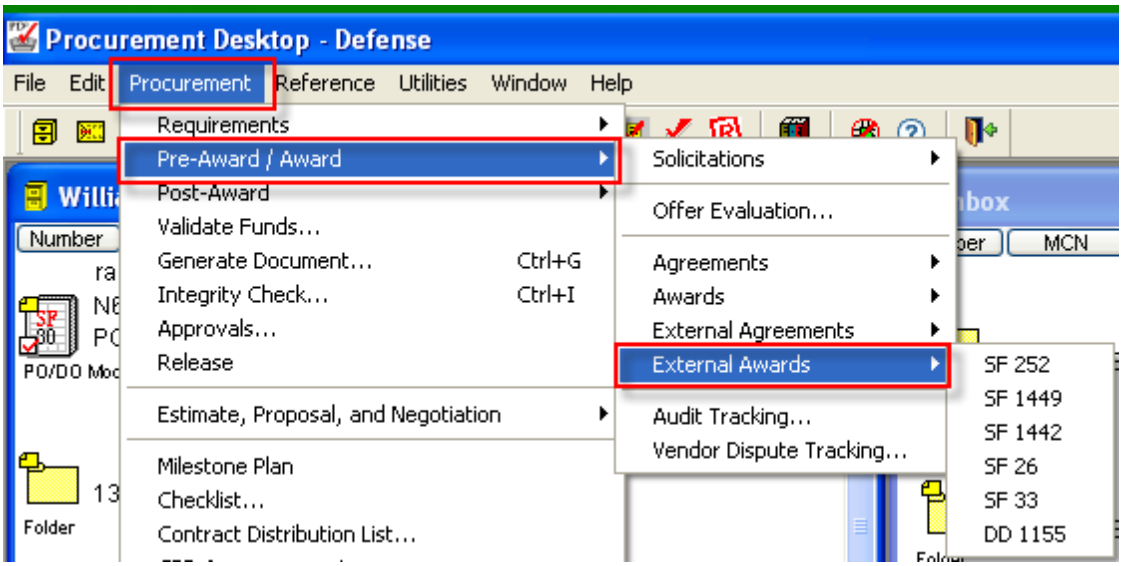
c. Vendor Points of Contact

	Program Manager (PM)	PM Alternate	Contracts Management	Sales & Ordering
POC	Tracey Haber	Ray Reed	Paula Anderson	Tracey Haber / Amy Burke
Telephone	703-387-5676	703-387-5704	703-387-5661	703-387-5676 / 703-387-5610
Email	tracey.haber@gartner.com	ray.reed@gartner.com	paulaj.anderson@gartner.com	tracey.haber@gartner.com/ amy.burke@gartner.com

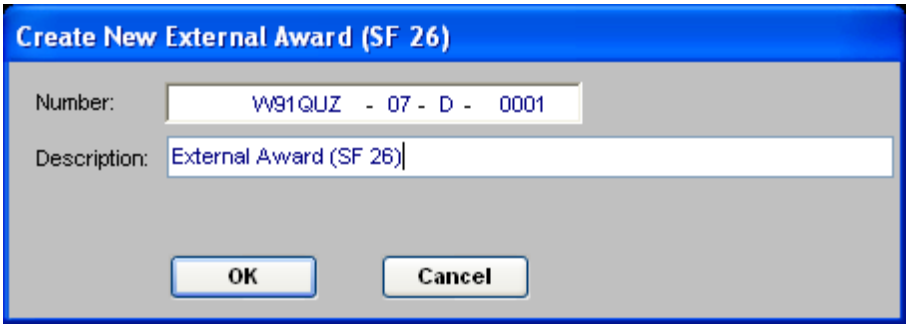
7. External Award / Agreement (for use in the Standard Procurement System (SPS))

Blanket Purchase Agreements awarded by other contracting offices can be entered in the system as external awards. External awards allow users to enter line item information and establish order constraints consistent with the original award. Once an external award is loaded in the system, it can be used as a reference when creating orders.

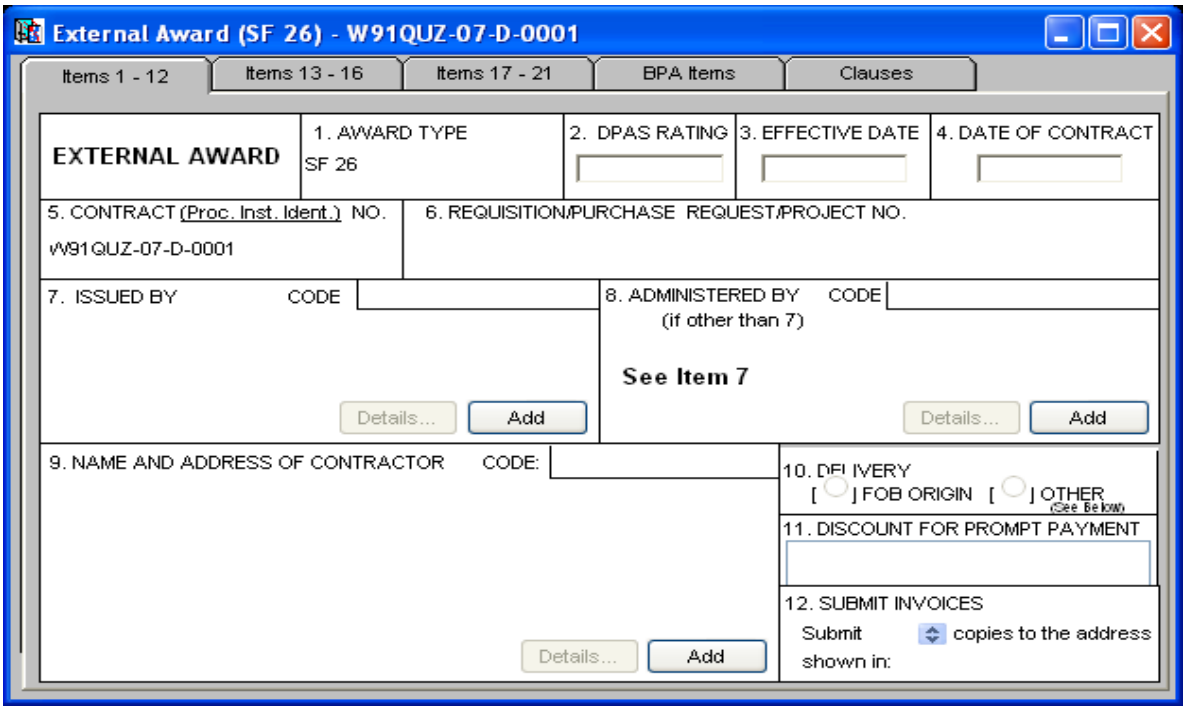
To create an external award, go to Procurement > Pre-Award / Award > External Awards (or Agreements) > select the desired form.



The Create New External Award window displays.



Enter the Agreement number for which the external award is being created. Click OK. The external award document is opened and displayed.



Enter all relevant information on the tabs to replicate the award that the external award is representing. You must create CLINs for external awards in order to issue orders off of those CLINs. Agreements do not utilize CLINs. It is not necessary to replicate clauses.

When complete, simply approve the external award. This document type is not run through funds validation, not generated, and not released.