

General Services Administration

**Federal Supply Services
Authorized Federal Supply Price List for;
Management, Organizational, and
Business Improvement Services
FCS Group874 Management Services-Class R499**



Contract Holder

Contract Number: GS-10F-0093R

Period Cover by Contract: November 16, 2004 through November 15, 2014
Supplement No. 000-Effective Date of Award

SIN 874-1 Consulting Services
SIN 874-5 Ancillary Supplies and Services
SIN 874-6 Privatization Support Services and Documentation (A-76)
SIN 874-7 Program Integration and Program Management Services

Capital Consultants, Inc.

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Business Size: Small Business
NAICS 541611

Online access to contract ordering information, terms, conditions, up to date pricing, and the option to create an electronic delivery order are available through the GSA Advantage website! <http://GSAAdvantage.gov>



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1.0 Customer Information (In Response to I-FSS-600):

1a. Table of Awarded Special Item Number(s): SINS: 874-1, 874-5, 874-6 and 874-7

| SIN | Description |
|-------|---|
| 874-1 | Consulting Services |
| 874-5 | Ancillary Supplies and Services |
| 874-6 | Acquisition Management Support |
| 874-7 | Program and Project Management Services |

1b. Identification of the Lowest Priced Model:

Not applicable as we are furnishing labor rates for professional services to be provided.

1c. The Contractor Proposes Hourly Rates:

The hourly rates are located on Pricelist Pages listed below.

2. Maximum Order: The maximum order to be issued is \$1,000,000.

3. Minimum Order: The minimum dollar value of orders to be issued is \$300.00.

4. Geographic Coverage (Delivery Area):

SIN's Numbers 874-1, 874-5, 874-6 and 874-7 are available to Domestic and Overseas locations.

5. Point of Production (city, county, and State or foreign country): Not applicable

6. Discounts from List Prices or Statement of Net Price:

Government prices are net prices (discounts already deducted).

7. Quantity Discounts:

Final offered labor rates are subject to an additional 1% discount if the numbers of labor skill categories ordered in a specific task order exceed seven (7) positions regardless of the number of hours ordered.

8. Prompt payment terms: 1% 20 days, Net 30 days.

9a. Government Purchase Cards below Micro purchase Threshold:

Government purchase cards are accepted at or below the micro purchase threshold.

9b. Government Purchase Cards above Micro purchase Threshold:

Government purchase cards are accepted over \$2,500.

10. Foreign Items (list by country of origin): None.

11a. Time of Delivery:



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The Contractor shall deliver to destination within the number of calendar days after receipt of order (ARO), as agreed to and as specified on the Delivery/Task Order.

11b. Expedited Delivery: Contact the Contractor.

11c. Overnight and 2-day Delivery: Contact the Contractor.

11d. Urgent Requirements:

When the Federal Supply Schedule contract delivery period does not meet the bona fide urgent delivery requirements of an ordering agency, agencies are encouraged, if time permits, to contact the Contractor for the purpose of obtaining accelerated delivery. The Contractor shall reply to the inquiry within 3 workdays after receipt. (Telephonic replies shall be confirmed by the Contractor in writing.)

12. F.O.B. point(s): Destination

13. Ordering Addresses and Procedures:

Bank account information for wire transfer payments is available as disclosed under the Central Contractors Registry at <http://www.ccr.gov>

13a. Ordering Addresses:

The following offices may be used as Ordering Locations:

Headquarters and Government Sales Office:

Capital Consultants, Inc.
324 Lirette Street
Houma, LA 70360

Virginia Office:

705 S. Military Hwy Ste. B
Virginia Beach, VA 23464

Memphis Office:

3874 Viscount Ave. Ste. 4
Memphis, TN 38118

The following points of contact can be used by ordering agencies to obtain technical, contractual and/or ordering assistance:

Headquarters in Louisiana:

(985) 851-5409 (Mr. Russell Landry)
(225) 806-0545 (Ms. Julie Robichaux)
(985) 851-5409 (Mr. Steve Renard)

13b. Ordering procedures:

For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA's), and a sample BPA can be found on Pricelist Pages that follows or



14. Payment Addresses:

Capital Consultants, Inc.
Attention: Accounts Receivable
324 Lirette Street
Houma, LA 70361-8040
Phone: (985) 851-5409
Fax: (985) 851-5414

15. Contractor Commitments, Warranties and Representations:

For the purpose of this contract, commitments, warranties, and representations include, in addition to those agreed to for the entire schedule contract:

- (1) Time of delivery/installation quotations for individual orders;
- (2) Technical representations and/or warranties of products concerning

performance, total system performance and/or configuration, physical, design, and/or functional characteristics and capabilities of any product / equipment/ service orders under this schedule contract.

- (3) Any representations and/or warranties concerning the products made in any literature, description, drawings, and/or specifications furnished by the Contractor.

16. Export Packaging Charges, if applicable: Not applicable.

17. Terms and Conditions of Government Purchase Card

Acceptance (any threshold above the micro purchase level):

Please contact Contractor's Headquarters Offices. See Paragraph 13b above.

18. Terms and conditions of rental, maintenance and repair (if applicable):

Not applicable.

19. Terms and conditions of installation (if applicable): Not applicable.

20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable): Not applicable.

20a. Terms and conditions for any other services (if applicable): Not applicable.

21. List of Service and Distribution Points (if applicable): Not applicable.

22. List of Participating Dealers (if applicable): Not applicable.

23. Preventive Maintenance (if applicable): Not applicable.



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24. Environmental attributes, e.g., recycled content, energy efficient, and/or reduced pollutants: Not applicable.

25. Data Universal Number Systems (DUNS) number: Listed: 16-802-0308

26. Notification regarding registration in Central Contractor Registration (CCR) database: Registered

27. Uncompensated Overtime: Contractor does not report or compensate employees for uncompensated overtime.



2.0 MOBIS Services by Special Item Number and Price Tables

Capital Consultants, Inc. provides services for MOBIS Special Item Numbers 874-1, 874-5, 874-6 and 874-7. In order to avoid an excessively long list of specialty positions, Capital Consultants, Inc. grouped the MOBIS professional positions into nineteen (19) major labor categories include Management Consultants, Functional Area Analysts, Administrative Support Specialists, Business Process Engineer (Business Process Re-Engineering Analyst), Business System Analyst, Project Managers, Task Order Managers, Technical Writers/Editors and Ancillary Supplies and/or Services. The remaining ten (10) positions are MOBIS Subject Matter Experts in the following areas:

| | | | | |
|---------------------|--------------------------------|-----------------------------|------------------------------|---------------------|
| Research & Analysis | Regulatory Policy & Compliance | Logistical Analysis | Operations Research Analysis | Regulatory Analysis |
| Internal Auditing | Labor Relations | Methods/Procedures Analysis | Organizational Development | Special Projects |

These positions are further subdivided based on education and experience. Capital Consultants, Inc. will provide MOBIS Services to authorize users of the MOBIS Schedule Contract on a worldwide basis as specified in the task order placed by the ordering activity. Capital Consultants, Inc. will provide all services in accordance with the requirements of any resultant contract or task order and shall assure effective performance of all services described herein. As stated earlier the MOBIS Special Item Number provided under this Multiply Award Schedule contract are:

- SIN 874-1 Consulting Services**
- SIN 874-6 Acquisition Management Support**
- SIN 874-7 Program and Project Management Services**

Pricing in accordance with the existing Capital Consultants, Inc. commercial practices with government discounts included in the pricelist. As pricing is based on labor rates, we will supplied and can clearly define each labor category upon request. Each labor rate category definition includes years of experience, minimum training, certifications, and, if applicable, degrees.

Capital Consultants, Inc. will provide all resources including personally, management, supplies, services, materials, equipment, facilities, and transportation necessary to provide the wide range of professional engineering services specified in each task order. Services specified in a task order will be performed at the contractor’s facilities or the ordering agency’s facilities. The prices in this pricelist are for government-owned facilities commonly known as “on-site” prices. Prices or Other Direct Costs involved is using contractor supplied office space at the contractor’s facilities (off-site) will be negotiated based on the duration of the work assignment. The Government will determine the Contractor’s compensation



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by any of the several different methods (to be specified at the task order level) e.g. a firm fixed prices for services with or without incentives, labor hour with ceiling or time and materials.

2.1 SIN 874-1 Consulting Services

Under this MOBIS GSA Federal Supply Schedule, Capital Consultants, Inc. shall provide expert advice, assistance, guidance or counseling in support of agencies' management, organizational and business improvement efforts. Those services include studies, analyses, analytical frameworks, business plans and reports documenting any proposed developmental, consultative or implementation efforts.

Examples of consultation include but are not limited to:

- Strategic Business and Action Planning
- System Alignment
- Cycle Time
- High Performance Work
- Leadership Systems
- Performance Measures and Indicators
- Process and Productivity Improvement
- Organizational Assessments
- Program Audits and Evaluations

Capital Consultants, Inc. labor categories offered are priced as hourly and daily rates and the descriptions of the labor categories offered are provided Section 2.5 of this pricelist. The total price for consulting services will be established at the time the Task Order is placed and will be based on the prices offered herein. The estimate number of hours negotiated with the ordering agency and the labor categories provided will be shown on the resultant Task Order.

If the agency Contracting Officer chooses to purchase from the SIN on a Labor Hourly basis, the resultant Task Order shall specify the Not To Exceed price, the labor categories provided (with the hourly rates for each), and any applicable Other Direct Costs (ODCs).

2.2 SIN 874-6 Privatization Support Services and Documentation

Under this MOBIS Special Item Number, Capital Consultants, Inc. provides expert advice, consultation, assistance and documentation in support of studies conducted under OMB Circular A-76 or other privatization or commercial activities studies, projects, or efforts. These services may include but are not limited to:

- o Strategic, Tactical, and Operational Level Planning Support
- o Comparison of In-House Bids to Proposed Inter-Service Support Agreement (ISSA) Prices
- o Assessments and/or Studies of Potential Privatization Initiatives
- o Development of Quality Assurance Surveillance Plans (QASP)
- o Performance of Management Studies to Determine the Government's Most Efficient Organization (MEO)
- o Administrative Appeal Process Support
- o Initial Study Planning
- o Development of In-House Government Cost Estimates



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- **Development of Performance Work Statement (PWS) and Statements of Objectives (SOO)**
- **Public-Private Partnership Support**

Capital Consultants, Inc.'s labor categories are provided as hourly rates and the descriptions of the labor categories offered are listed in Section 2.5 of this pricelist. The total price for privatization support services and documentation will be established at the time the Task Order is placed and will be based on prices offered herein.

The estimate number of hours negotiated with the ordering agency and the labor categories provided will be shown on the resultant with the ordering agency and the labor categories provided will be shown on the resultant Task Order. If the agency Contracting Officer chooses to purchase from this SIN on a Labor Hour basis, the resultant Task Order shall specify the "Not To Exceed" price, the labor categories proposed (with hourly rates for each), and any applicable Other Direct Costs (ODC's).

2.3 874-7 Program Integration and Project Management Services

Under this MOBIS Special Item Number, Capital Consultants, Inc. shall provide services in the management, integration, and programs and projects. These services may include, but are not limited to:

- **Program Management**
- **Program Oversight**
- **Project Management**
- **Program Integration (Team Leader)**
- **Strategic**

Capital Consultants, Inc.'s labor categories are provided as hourly rates and the descriptions of the labor categories offered are listed in Section 2.5 of this pricelist. The total price for privatization support services and documentation will be established at the time the Task Order is placed and will be based on prices offered herein.

The estimate numbers of hours negotiated with the ordering agency and the labor categories provided will be shown on the resultant Task Order. If the agency Contracting Officer chooses to purchase from the SIN on a Labor Hourly basis, the resultant Task Order shall specify the Not To Exceed price, the labor categories provided (with the hourly rates for each), and any applicable Other Direct Costs (ODCs).

2.4 MOBIS Professional Services Price Table for ALL SINS

| SIN 874-1 Consulting Services SIN 874-6 Privation Support Services and Documentation SIN 874-7 Program Integration & Program Management | | |
|--|--|---------------|
| Additional 1% Discount if Seven (7) or more positions ordered in the same task order. | | |
| MOBIS Professional Services Labor Category Title Base Period | | GOV. |
| Hourly Prices and Other Direct Cost | | Hourly |
| Positions Descriptions, Experience and Education are on Pricelist Pages 16 through 33 | | Rate |
| 1 | Administrative Support Specialists I | \$31.52 |
| 2 | Administrative Support Specialists III | \$38.58 |
| 3 | Business Process Engineer III | \$56.87 |
| 4 | Business Process Engineer IV | \$79.25 |
| 5 | Business Systems Analyst I | \$47.74 |
| 6 | Business Systems Analyst III | \$71.14 |
| 7 | Business Systems Analyst V | \$94.54 |
| 8 | Subject Matter Expert - Research & Analysis I | \$27.46 |
| 9 | Subject Matter Expert - Internal Auditing I | \$45.76 |
| 10 | Subject Matter Expert - Regulator Policy & Compliance I | \$38.58 |
| 11 | Subject Matter Expert - Regulator Policy & Compliance II | \$49.82 |
| 12 | Subject Matter Expert - Labor Relations I | \$49.82 |
| 13 | Subject Matter Expert - Logistical Analysis I | \$42.64 |
| 14 | Subject Matter Expert - Methods/Procedures Analysis I | \$41.70 |
| 15 | Subject Matter Expert - Operations Research Analysis I | \$54.91 |
| 16 | Subject Matter Expert - Organizational Development III | \$61.98 |
| 17 | Subject Matter Expert - Organizational Development IV | \$74.15 |
| 18 | Subject Matter Expert -Regulatory Analysis I | \$50.86 |
| 19 | Subject Matter Expert -Regulatory Analysis II | \$73.22 |
| 20 | Subject Matter Expert - Special Projects II | \$50.86 |
| 21 | Subject Matter Expert - Special Projects III | \$65.00 |
| 22 | Project Manager III | \$103.69 |
| 23 | Task Order Manager I | \$83.30 |
| 24 | Task Order Manager II | \$94.54 |
| 25 | Technical Writer/Editor I | \$46.80 |
| 26 | Technical Writer/Editor III | \$66.04 |
| 27 | Management Consultant I | \$54.91 |
| 28 | Management Consultant III | \$94.54 |
| 29 | Functional Area Analysis I | \$54.91 |
| 30 | Functional Area Analysis III | \$94.54 |



| Base Period -Other Direct Costs Description | | Unit | Price |
|---|---------------------------------------|------|-------|
| ODC | ODC-Travel, Lodging and Per Diem | LOT | TBD |
| ODC | ODC-MISC. Equipment and Supplies | LOT | TBD |
| ODC | ODC-Printing, Coping and Reproduction | LOT | TBD |
| ODC | ODC-Miscellaneous Other Direct Costs | LOT | TBD |

The prices shown above have not been escalated for each year since they are based upon a Commercial Pricelist: and, therefore, escalation will be governed by clause 522.216-70, Economic Price Adjustment-FSS Multiple Award Schedule Contract with further restriction that any approval increases shall not exceed 4% per annum. Final offered labor rates are subject to an additional 1% discount if the number of labor skill categories ordered in a specific task order exceeds seven (7) positions regardless of the number of hours ordered.

2.5 SCA Matrix

Capital Consultants, Inc. acknowledges the requirements of the Service Contract Act (SCA), and has verified that the price for the non-exempt labor category meets the SCA minimums in the contract and the SCA matrix and narrative below will be incorporated into the contract and must be included in the firm’s price list.

| Capital Consultants, Inc. SCA Matric | | |
|--------------------------------------|--------------------------------|-----------|
| SCA Eligible Contract Labor Category | SCA Equivalent Code - Title | WD Number |
| Administrative Support Specialists | 01020-Administrative Assistant | 05-2233 |
| Technical Writer/Editor I | 30461-Technical Writer I | 05-2233 |
| Technical Writer/Editor III | 30463-Technical Writer III | 05-2233 |

The Service Contract Act (SCA) is applicable in this contract and it includes SCA applicable labor categories. The prices for the indicated SCA labor categories are based on the U.S. Department of Labor Wage Determination Number(s) identified in the matrix. The prices offered are based on the preponderance of where work is performed and should the contractor perform in an area with lower SCA rates, resulting in lower wages being paid, the task order prices will be discounted accordingly.

3.0 MOBIS Position Descriptions-874-1, 874-6 and 874-7

The following tables present Capital Consultants, Inc.’s positions for the nineteen major job descriptions broken out as thirty (30) individual professional services positions used to provide services for SIN’s 874-1, 874-6 and 874-7. The positions include the professional positions and support positions incidental to the MOBIS services. They are presented with a General Summary and a narrative of the Principal duties, Experience and Responsibilities. Following the Principal the Job titles along with their requisite Education and Years of General Experience completes the

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 position description. If appropriate, substitution of experience or education for experience is proposed.

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3.1 Administrative Support Specialist

General Summary

Responsible for providing a wide variety of administrative support to an individual or department and applies knowledge of department policies and procedures in coordinating administrative activities.

Principal Duties, Experiences & Responsibilities

Schedules appointments, gives information to callers, takes dictation and otherwise relieves officials of clerical work and minor administrative and business detail. Relies on instructions and pre-established guidelines to perform the functions of the job, and works under immediate supervision. Primary job functions do not typically require exercising independent judgment. Typically reports to a supervisor or manager and specializes in coordinating and planning office administration support. Understands and provides documentation planning and support, project administration, general office support, executive secretarial support, human resource planning, event planning and administration, office relocation planning, etc. required in changing office environments. May perform all other administrative duties as assigned by immediate supervisor, gathers, analyzes, edits, and prepares technical information documenting the operations or related consulting functions. Translates technical information into reliable documents and will assist in the preparation of drawings and other graphics requiring supporting documentation.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| Job Title | | Years | General Experience Specification & Education |
|-----------|--|-----------|--|
| 01 | Administrative Support Specialists I | 1-3 Years | This position requires a high school diploma with zero (0) to three (3) years of experience in any office environment. Must be familiar with common office equipment and tools such as; word processors, spreadsheets, fax machines and photocopiers. Excellent verbal and written communication skills and be proficient with Microsoft Office software or equal to it. Including Access, Outlook email, Internet savvy, and an advanced knowledge of Microsoft Word and Excel is required. |
| 02 | Administrative Support Specialists III | 5-Years | This position requires a high school diploma and five (5) years of experience in any office environment. Must be familiar with common office equipment and tools such as; word processors, spreadsheets, fax machines and photocopiers. Excellent verbal and written communication skills and be proficient with Microsoft Office software or equal to it. Including Access, Outlook email, Internet savvy, and an advanced knowledge of Microsoft Word and Excel is required. Super |



3.2 Business Process Engineer (Business Process Re-Engineering Analyst)

General Summary

This position requires knowledge of Business Rule Management, process re-engineering, current state analysis interviews, process validation, and process modeling. Experience with Teams, brainstorming, process improvement, goal setting, measurement, and process modeling, as well as an understanding of process tools, such as, Fishbone, Pareto, Histogram, Cause-Effect and usage. Measure and access impact of process changes on the operational and economic matrices of the corporation. Understand business objectives as they relate to the success of the process that you have put in place.

Principal Duties, Experiences & Responsibilities

Purpose changes that challenge the existing and encompass success by performance based monitoring. From cross-departmental teams to implement business processes, monitor progress goals and modify tasks to address required changes as necessary. Processes Project Management skills for the full life cycle fulfillment of multiply projects simultaneously, while, consulting with executive management. Also, manages projects for organization transformation that requires the application of re-engineering, organizational and change management approaches including information technology infrastructure redesign related to the design of the most efficient operation of the organization or business entity.

Performs complex evaluations of existing procedures, processes, techniques, models, and/or systems related to management problems or contractual issues that which would require a report and recommend solutions. (1) Defines, plans, and leads complex, enterprise-wide business/organization re-engineering engagements. (2) Oversees business process re-engineering projects, including defining executive project objectives; planning, project execution, recommendation development, and solution delivery planning. (3) Manages team of clients and management consultants on projects and also applies business re-engineering approaches and techniques, including strategic planning, business information planning, enterprise information requirements analysis, activity based costing, economic analysis, information technology architecture design, change management to effect organization performance. (4) Provides solution options, creates, and manages plans for re-engineering implementation as required. (5) Other duties may include but are not limited to, work breakdown structures, prepare charts, tables, and diagrams to assist in analyzing problems and experienced in working with or creating a centralized project management office (PMO) as an independent project authority. Also has experience in negotiating, prioritizing, bundling, managing, and communication the process, policy and methods leading to successful integration of diversified departments.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|-------------------------------|--------------|---|
| 03 | Business Process Engineer III | 5 years | Senior Management to Director Level for less than 2 years, Computer Science, Computer Information Systems, Engineering, Business or related scientific or technical discipline. |
| 04 | Business Process Engineer IV | 10 -Years | Director-Level for less than 2 years; and can manage project(s) or program(s) without direction and can make a department wide impact. , Computer Information Systems, Engineering, Business or related scientific or technical discipline. |



3.3 Business System Analyst

General Summary

This position requires a superior knowledge of process assessment and development, ability to obtain and document methods and procedures and process workload assessment. The individual has experience in assisting consultants, engineers, scientists and program officials in planning research project designs and managing progress of studies by reviewing proposals, estimating work hour requirements and advising on the most efficient sequencing of events. The SME must have demonstrated successful experience in the area of research, analysis, design, implementation, and testing as well as, the writing specifications and documentation; and the design of a business area system to support financial and program management of large-scale multi-user computer information and retrieval system.

Principal Duties, Experiences & Responsibilities

Reviews, analyzes, and evaluates business systems and user needs. Formulates systems to parallel overall business strategies and has exceptional people and interviewing skills. Has essential experience in documentation work for process engineering and workload assessments and management and procedures, covering any of the functional areas of organizational order fulfillment, billing and customer care. Interviews users and reviews documents understand processes developed for supporting case research or order entry, order workflow management, provisioning, service activation of network elements, billing account set-up and billing start notification, usage mediation, rating, billing, collections, posting, and journaling. Candidate must be familiar with government and related organizational rules; procedures, regulations and the all relevant US Code and Federal regulations applicable.

The Business Analyst assesses completeness of the documentation, identify missing procedures, and assess organizational workloads required to support these processes. This person will not be developing new procedures only assessing the viability and completeness of existing documentation. In support of management and procedure will have on the various organization studies, the SME must be able to assess organizational workloads required to support these processes. This person will not be developing new processes, only assessing the viability and completeness of existing documentation. In support of management consultations and organizational studies, the SME must be able to assess workload impacts these management and procedures will have on the various organizations involved. Has knowledge of common-used concepts, practices and procedures within a particular field. Relies on instructions and pre-established guidelines to perform the functions of the job and works under immediate supervision. Primary job functions do not typically require exercising independent judgment.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|------------------------------|--------------|--|
| 05 | Business Systems Analyst I | 1 year | Analyst works under supervision more experienced managers or supervisors or directors. BA/BS Computer Science, Computer Information Systems, Engineering, Business or other related scientific discipline. |
| 06 | Business Systems Analyst III | 5 -Years | Business Analyst works under minimal direction of more experienced managers or supervisors or directors. BA/BS in Computer Science, Computer Information Systems, Engineering, Business or other related scientific or technical discipline. |
| 07 | Business Systems Analyst V | | Can function as a Business Analyst manager and can manage project(s) or program(s) analysis without minimal direction. BA/BS Computer Science, Computer Information Systems, Engineering, Business or other related scientific discipline. |



3.4 Subject Matter Expert- Research and Analysis

General Summary

Subject Matter Expert-research and Analysis provides management, organizational and technological subject matter technical expertise, functional expertise, or consultant expertise on advanced and state of the art methods, theories, and technical required in the investigation and solution of complex concepts, planning, design, and/or implementation problems related to subject matter. SME will provide consulting services that may include some level of direct participation in all subject matter activities relating to government compliance and must be familiar with government and related organizational rules, procedures regulations and the relevant US Code and Federal Regulation applicable. Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex programs activities, with an emphasis on investigative research, analysis, monitoring organizational or individual activities to study relevant activities including where detecting possible government, employee or customer fraud or violation of rules, regulations and statutes.

Principal Duties, Experiences & Responsibilities

The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. (4) The SME must be familiar with government and related subject matter organizational rules and procedures, regulations and the relevant US Code and Federal Regulations applicable.

As a part of the consultative role, the SME may complete sample or actual forms and request originating from government agencies to increase his/her understanding of the particular environment. Familiar with standard concepts, practices, and procedures in a particular field and relies on experience and judgment to plan and accomplish goals that are established. Performs a variety of tasks and a certain degree of creativity and latitude is required. Responsible for advising, consulting and in limited cases preparing, updating and distributing project management products when needed. Consults where necessary monitors account activity to detect possible government, management, employee or customer fraud, or criminal or civil violations of the law.

In support of management consultations and organizations studies, the SME performs analysis to identify possible front-end and/or back-end fraud and where necessary performs research into compliance with local, state, regional, and federal rules, regulations, and laws. Identifies areas for increased security procedures and recommends to fraud prevention associates. May contact customers to verify or explain unusual account activity. Has knowledge of commonly used concepts, practices, and procedures within a particular field. Relies on instructions and pre-established guidelines to perform the functions of the job and works under immediate supervision of a manager or a senior research analysis.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|---------------------------|--------------|---|
| 08 | SME-Research & Analysis I | 1 years | Requires a Bachelor's degree in area of specialty; Works under general supervision; reports t a project manager, senior executive supervisor or task manager. |



3.5 Subject Matter Expert-Internal Auditing

General Summary

Subject Matter Expert-Internal Auditing provides technical expertise, functional expertise, or consultant expertise on advanced and state of the art methods, theories, and technical required in the investigation and solution of complex concepts, planning, design, and/or implementation problems related to subject matter. SME will provide consulting services that may include some level of direct participation in all subject matter activities relating to government compliance and must be familiar with government and related organizational rules, procedures regulations and the relevant US Code and Federal Regulation applicable. Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex programs activities, with an emphasis on investigative research, analysis, monitoring organizational or individual activities to study relevant activities including audits of accounting and financial data from various departments within an organization to ensure accuracy and compliance with the government guidelines and laws.

Principal Duties, Experiences & Responsibilities

The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. As a part of the consultative role, the SME may complete sample or actual forms and request originating from government agencies to increase his/her understanding of the particular environment. Familiar with standard concepts, practices, and procedures in a particular field and relies on experience and judgment to plan and accomplish goals that are established. Performs a variety of tasks and a certain degree of creativity and latitude is required. Responsible for advising, consulting and in limited cases preparing, updating and distributing project management products when needed.

In support of management consultations and organizations studies, the SME must be familiar with government and related organizational rules, procedures, regulations and relevant US Code and Federal Regulations applicable. The SME consultants and when deemed necessary identifies improper accounting and/or documentation or researches issues and will make recommendations to improve policies or procedures accordingly. Works with outside auditors to help reconcile discrepancies or support the external auditing function or team. Has knowledge of commonly used concepts, practices, and procedures within a particular field. Relies on instructions and pre-established guidelines to perform the functions of the job and works under immediate supervision of a manager or a senior research analysis. Primary job functions typically require exercising independent judgment.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|-------------------------|--------------|---|
| 09 | SME-Internal Auditing I | 1 year | Requires a Bachelor's degree in accounting, business, finance, statistics or related science and works under general supervision or manager |



3.6 Subject Matter Expert-Policy and Compliance

General Summary

Subject Matter Expert-Policy and Compliance provides consulting, management, organizational subject matter technical expertise, functional expertise, or consultant expertise on advanced and state of art methods, theories and technical required in the investigation and solution of complex concepts, planning, design, and/or implementation problems related to the subject matter. The SME provides consulting services that may include some level of direct participation in all subject matter activities relating to government compliance.

Principal Duties, Experiences & Responsibilities

SME-Must is familiar with government and related organizational rules, procedures, regulations and relevant US Code and Federal Regulations applicable. Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex program activities to study relevant activities including government, management, employee or customer compliance with or violations of rules, regulations and statues. Conducts private investigations to uncover violations of rules, regulations, or procedures, uses electronic and physical research to locate missing locations, missing persons, missing files and obtains confidential information. The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. (4)The SME must be familiar with government and related subject matter organizational rules and procedures, regulations and the relevant US Code and Federal Regulations applicable.

As a part of the consultative role, the SME may complete sample or actual forms and requests originating from government agencies to increase to his/her understanding of the particular environment. Familiar with standard concepts, practices, and procedures within a particular field, and relies on experience and judgment to plan accomplish goals. Performs a variety of tasks, A certain degree of creativity and latitude is required. Responsible for advising, consulting; and in limited cases preparing, updating, and distributing project management products.

In support of management consultations and organizational studies, the SME conducts independent investigations and research resulting from the discovery of situations that potentially involve fraud or abuse. Maintains appropriate liaison with State and Federal Law Enforcement/Regulator Agencies and is familiar with standard concepts, practices, and procedures within a particular field. Relies on experience and judgment to plan and accomplish goals. Performs a variety of complicated tasks and will report to a manager or department head. A wide degree of creativity and latitude is expected.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor’s Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master’s Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|---------------------------|--------------|--|
| 10 | SME-Policy & Compliance I | 2 years | Requires an associate’s degree or its equivalent. Works under general supervision; reports to a supervisor or manager. |
| 11 | SME-Policy & Compliance I | 5 years | Requires an associate’s degree or its equivalent. Works under general supervision; reports to a supervisor or manager. |



3.7 Subject Matter Expert-Labor Relations

General Summary

Subject Matter Expert-Labor Relations provides consulting, management, organizational subject matter technical expertise, functional expertise, or consultant expertise on advanced and state of art methods, theories and technical required in the investigation and solution of complex concepts, planning, design, and/or implementation problems related to the subject matter. The SME provides consultative services that may include some level of direct participation in all subject matter activities relating to government compliance and must be familiar with government and related organizational rules, procedures regulations and the relevant US Code and Federal Regulation applicable. Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex programs Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex programs activities, with an emphasis on research, analysis, monitoring organizational or individual activities to study relevant activities including government, management, employee or customer compliance with or violation of rules, regulations and statutes. Recommends and assists in the writing of subject matter policies/procedures, provide agreements and government laws, and investigate grievances.

Principal Duties, Experiences & Responsibilities

The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. (4) The SME must be familiar with government and related subject matter organizational law rules, procedures, regulations and the relevant US Code and Federal Regulations applicable.

As a part of the consultative role, the SME may complete sample or actual forms and requests originating from government agencies to increase to his/her understanding of the particular environment. Familiar with standard concepts, practices, and procedures within a particular field, and relies on experience and judgment to plan accomplish goals and performs a variety of tasks. A certain degree of creativity and latitude is required. In support of management consultations and organizational studies, the SME advises management and client matters concerned with labor contract negotiations or studies especially those related to the establishment of the most efficient organization. Prepares or reviews contract agreements. The SME must be familiar with federal, state and local regulations pertaining to labor issues.

The SME consultants with management in the representation of the organization in legal hearings on labor governing bodies, and when requested, makes recommendations for changes to the existing polices to ensure compliance with new or proposed regulations. Has knowledge of common used concepts, practices, and procedures within a particular subject matter field. The SME relies on instructions and pre-established guidelines to perform the functions of the job. Primary job functions require exercising independent judgment.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|-----------------------|--------------|---|
| 12 | SME-Labor Relations I | 1 year | Requires a bachelor's degree in Management, works under general supervision and reports to a supervisor or manager. |



3.8 Subject Matter Expert-Logistical Analysis

General Summary

Subject Matter Expert-Logistical Analysis provides organizational and management technical expertise, functional expertise, or consultant expertise on advanced and state-of-the-art methods, theories, and techniques required in the investigation and solution of complex concepts, planning, design and/or implementation problems related to the subject matter. The SME provides consulting services, which may include a certain level of direct participation in all subject matter activities that are related to government compliance.

The SME must be familiar with government and related organizational rules, procedures, regulations and the relevant US code and Federal Regulation applicable. Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex program activities, with an emphasis on analysis and evaluation of program status.

Principal Duties, Experiences & Responsibilities

The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. As a part of the consultative role, the SME may complete sample or actual forms and requests originating from government agencies to increase his/her understanding of the particular environment.

Familiar with standard concepts, practices, and procedures within a particular field and relies on experience and judgment to plan and accomplish goals and performs a variety of tasks. A certain degree of creative and latitude required. In support of management consultations and organizational studies, the SME creates and reviews organizational and management procedures for distribution of inventory management to maximize customer satisfaction and minimize costs.

Has knowledge of commonly used concepts, practices, and procedures within a particular field. Relies on instructions and pre-established guidelines to perform the functions of the job and works under immediate supervision of a manager or a senior research analysis.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|-------------------------|--------------|--|
| 13 | SME-Logistic Analysis I | 1 year | Requires an Associate's Degree or equivalent, Management experience is a plus, and Works under general supervision or manager. |



3.9 Subject Matter Expert-Methods/Procedures Analysis

General Summary

Subject Matter Expert-Methods/Procedures provides consulting services organizational management along with technical expertise, functional expertise, or consultant expertise on advanced and state-of-the-art methods, theories, and techniques required in the investigation and solution of complex concepts, planning, and design and/or implementation problems related to the subject matter. A SME provides consulting services that may include a certain level of direct participation in all subject matter activities relating to government compliance. The SME must be familiar with government and related organizational rules, procedures, regulations and the relevant US code and Federal Regulation applicable. Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex program activities, with an emphasis on analysis and evaluation of program status which entails routine policy development and documentation as well as periodic special projects.

Principal Duties, Experiences & Responsibilities

The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. As a part of the consultative role, the SME may complete actual research, development, and analysis, also handles requests originating from government agencies to increase his/her understanding of the particular environment.

Familiar with standard concepts, practices, and procedures within a particular field and relies on experience and judgment to plan and accomplish goals and performs a variety of tasks. A certain degree of creative and latitude required. Collects and analyzes data to evaluate operational difficulties and make recommendations to solve problems. In support of management consultations and organizational studies, the SME follows established modeling and evaluation processes to determine the effectiveness of current operational activities to determine problem areas and develop solutions.

Has knowledge of commonly used concepts, practices, and procedures within a particular field. Evaluates, maintains and improves efficiency of organization. Develops and implements new policies, procedures and paperwork to simplify and improve operations. Determines need for new equipment. Exceptional grammar and technical writing skills are necessary as is advanced familiarity with Word, Excel, and Access. Has knowledge of commonly used concepts, practices, and procedures within a particular field. The SME relies on limited instructions and pre-established guidelines to perform the functions of the job.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|---|--------------|---|
| 14 | SME Methods/Procedures Analysis I | 1 year | May require a Bachelor's Degree Management, Engineering or the Sciences and Works under immediate supervision; reports to a supervision or manager. |



3.10 Subject Matter Expert-Operations Research Analysis

General Summary

Subject Matter Expert-Operations Research Analysis provides consulting services organizational management along with technical expertise, functional expertise, or consultant expertise on advanced and state-of-the-art methods, theories, and techniques required in the investigation and solution of complex concepts, planning, and design and/or implementation problems related to the subject matter. A SME provides consulting services that may include a certain level of direct participation in all subject matter activities relating to government compliance. The SME must be familiar with government and related organizational rules, procedures, regulations and the relevant US code and Federal Regulation applicable. Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex program activities, with an emphasis on analysis and evaluation of program status. The SME primarily responsibility for reviewing the planning, organizing and leading tasks and projects, as well as, and ensuring the quality of client’s deliverables. A SME applies well-developed consulting, assignment management and functional skills in the execution of the work.

Principal Duties, Experiences & Responsibilities

The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. As a part of the consultative role, the SME may complete sample or actual forms and requests originating from government agencies to increase his/her understanding of the particular environment.

Familiar with standard concepts, practices, and procedures within a particular field and relies on experience and judgment to plan and accomplish goals and performs a variety of tasks. A certain degree of creative and latitude required. Collects and analyzes data to evaluate operational difficulties and makes recommendations to solve problems.

In support of management consultations and organizational studies, the SME follows established modeling and evaluation processes to determine the effectiveness current operational activities to determine problem areas and develop solutions. Has knowledge of commonly used concepts, practices, and procedures within a particular field. Has knowledge of commonly used concepts, practices, and procedures within a particular field. The SME relies on limited instructions and pre-established guidelines to perform the functions of the job.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor’s Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master’s Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|------------------------------------|--------------|---|
| 15 | SME Operations Research Analysis I | 1 year | Requires a Bachelor’s Degree in Management, Engineering or the Sciences and works under immediate supervision; reports to a supervision or manager. |



3.11 Subject Matter Expert-Organizational Development

General Summary

Subject Matter Expert-Operational Development provides organizational analysis, technical expertise, functional expertise, or consultant expertise on advanced and state-of-the-art methods, theories, and techniques required in the investigation and solution of complex concepts, planning, and design and/or implementation problems related to the subject matter. The SME provides consulting services that may include a certain level of direct participation in all subject matter activities relating to government compliance.

The SME must be familiar with government and related organizational rules, procedures, regulations and the relevant US code and Federal Regulation applicable. Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex program activities, with an emphasis on analysis and evaluation of program status. Enhances product workflow by analyzing and developing plans that affect the capabilities of the organizational structure and enhances the use of human capital.

The SME-Organizational Development is an internal consultant responsible for facilitating positive organizational change, serving as a trusted advisor to managers at every level, and providing technical management support for human resource initiatives addressing the effectiveness and retention of employees. Typically, this SME will be involved at the corporate level in the following of initiatives: performance management, succession planning, management assessment, employee recognition, competency modeling, mentoring, diversity, and anti-harassment/EEO policy compliance. The Organizational Development Specialists also leads internal business consulting projects and related A-76 and most efficient organizational studies.

Principal Duties, Experiences & Responsibilities

The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. As a part of the consultative role, the SME may complete sample or actual forms and requests originating from government agencies to increase his/her understanding of the particular environment.

In support of management consultations and organizational studies, the SME establishes and maintains effective human performance programs such a performance management, succession planning, competency modeling, diversity, mentoring, recognition, harassment free workplace. Ideal person for the job must have strong interpersonal skills including classroom facilitation, strong writing skills, as well as strong verbal and communication skills and is able to work independently in a collaborative setting.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor’s Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master’s Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|------------------------------------|--------------|---|
| 16 | SME Organizational Development III | 5 years | Requires a Bachelor’s degree and has an advanced degree in HR/OD is preferred. At least 5 years OD experience in a corporate setting is required. Minimum 7 years business experience in a corporate setting is strongly preferred. Industry certification is a plus. |
| 17 | SME Organizational Development IV | 8 years | Requires a Bachelor’s degree and has an advanced degree in HR/OD is preferred. At least 5 years OD experience in a corporate setting is required. Minimum 8 years business experience in a corporate setting is strongly preferred. Industry certification is a plus. |



3.12 Subject Matter Expert-Regulatory Analysis

General Summary

In order to support organizational and management studies required by the government the Subject Matter Expert-Regulatory Analysis provides technical consulting expertise, functional expertise, or legal expertise on advanced and state-of-the-art methods, theories, and techniques required in the investigation and solution of complex concepts, planning, and design and/or implementation problems. The SME provides consulting services that may include a certain level of direct participation in all subject matter activities relating to government compliance. The SME must be familiar with government and related organizational rules, procedures, regulations and the relevant US code and Federal Regulation applicable.

Principal Duties, Experiences & Responsibilities

The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. As a part of the consultative role, the SME may complete sample or actual forms and requests originating from government agencies to increase his/her understanding of the particular environment. Familiar with standard concepts, practices, and procedures within a particular field and relies on experience and judgment to plan and accomplish goals and performs a variety of tasks. A certain degree of creative and latitude required.

As a part of the consultative role, the SME may complete sample or actual forms and requests originating from government agencies to increase to his/her understanding of the particular environment. Familiar with standard concepts, practices, and procedures within a particular field, and relies on experience and judgment to plan accomplish goals, and performs a variety of tasks. Relies on experience and judgment to plan and accomplish goals. This SME is responsible for advising, consulting and in limited cases preparing, updating and distributing project management products. The SME conducts independent investigations resulting from the discovering of situations that potentially involve fraud or abuse. The SME also maintains appropriate liaison with State and Federal Law Enforcement /Regulatory Agencies.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor’s Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master’s Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|--------------------------------|--------------|--|
| 18 | SME Regulatory Analysis I | 2 years | Requires a Bachelor’s Degree in Management or related field and works under general supervision and typically reports to a supervisor or manager. |
| 19 | SME Regulatory Analysis III | 6 years | Requires a Bachelor’s Degree in Management or related field and works under general supervision and typically reports to a supervisor or manager. Management experience is a plus. |



3.13 Subject Matter Expert-Special Projects

General Summary

Subject Matter Expert-Internal Auditing provides technical expertise, functional expertise, or consultant expertise on advanced and state of the art methods, theories, and technical required in the investigation and solution of complex concepts, planning, design, and/or implementation problems related to subject matter. SME will provide consulting services that may include some level of direct participation in all subject matters. The SME provides consulting services that may include a certain level of direct participation in all subject matter activities relating to government compliance. The SME must be familiar with government and related organizational rules, procedures, regulations and the relevant US code and Federal Regulation applicable. The SME provides consulting services, which may include a certain level of direct participation in resource management and administrative functions and activities such as budgeting, staffing, and resource planning, and reporting.

Principal Duties, Experiences & Responsibilities

The Subject Matter Expert (SME) is often one of the highest levels of individual contributor and is normally recognized for achievements, technical expertise, and meritorious standing within his or her professional field. (2) Assesses user needs to determine subject matter technical and functional requirements. (3) Determines most appropriate implementation strategies and coordinates with project staff as appropriate. As a part of the consultative role, the SME may complete sample or actual forms and requests originating from government agencies to increase his/her understanding of the particular environment.

Familiar with standard concepts, practices, and procedures within a particular field and relies on experience and judgment to plan and accomplish goals and performs a variety of tasks. A certain degree of creative and latitude required. This SME is responsible for advising, consulting and in limited cases preparing, updating and distributing project management products, such as PERT/CPM/GANTT chars and major milestone calendars required for overall program management.

Responsible for providing consulting services in a wide variety of moderate to highly detailed and complex program activities, with an emphasis on analysis on evaluation of program status. Monitors and tracks identified events in each individual projects and tracks the interdependencies of all schedules, resulting in an overall master schedule. Develops work breakdown structures and prepares charts, tables, graphs, and diagrams to assist in analyzing problems and making recommendations. The SME provides functional guidance, technical support, and quality assurance/quality control as deemed necessary, and supports senior staff as required and works to ensure customer budgets requirements and project milestones are met.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|--------------------------------|--------------|--|
| 20 | SME Special Projects II | 3 years | This position requires a Bachelor's Degree in Accounting, Business, Finance, Management, Computer Science, or Engineering or equivalent. |
| 21 | SME Regulatory Analysis III | 5 years | This position requires a Bachelor's Degree in Accounting, Business, Finance, Management, Computer Science, or Engineering or equivalent. |



3.14 Project Manager

General Summary

The Project Manager-is responsible for smaller projects or a segment of a large complex project. He or She will translate customer requirements into formal agreements and plans that culminate in customer acceptance of results while meeting business objectives. The Project Manager also manages projects to meet requirements, budgets and schedules.

Principal Duties, Experiences & Responsibilities

Works with the customer to identify business requirements and develops the proposed solution. Subsequently leads a team in initiating, planning, controlling, executing, and closing tasks of a project or segment of a project to produce the delivered solution. The Project Manager executes a wide range of process activities beginning with the initial technical response to an order through development, test, and final delivery. He or she formulates partnerships between customers, suppliers and staff, as well as, anticipating potential project related problems and will use refined techniques for identifying, eliminating, or migrating solution, projects, and business risks.

The project Manager is responsible for managing and advising, consulting and in limited cases preparing, updating, and distributing project management products to the client’s senior management. He or she conducts independent investigations resulting from the discovery of situations that potentially involve fraud and abuse and maintains appropriate liaison with State and Federal Law Enforcement /Regulatory Agencies. . Relies on experience and judgment to plan and accomplish goals, usually reports to a manager or department head. A wide degree of creativity and latitude is expected.

Performs day-to-day management of assigned project tasks including budgeting, scheduling, and corresponding, manages multiply teams of consultants, analysts, and other system professionals. Organizes and directs all activities of team members involved in analyzing, testing, documenting, converting, extending, and implementing the specific MOBIS tasks. Provides structure and ensures progression of working groups and teams by maintaining focus and avoiding unnecessary digression or duplication. Works with the client’s system and Subject Matter Experts (SME’s) Writes all reports documenting project status and interfaces with senior government executives and acquisition staff.

Understands customer, industry, and business trends and applies this understanding to meet the project objectives. As appropriate, challenges the validity of given procedures and processes to enhance or improve them. Analyzes information and situations and implements actions, either independently or through the management team, to ensure project objectives are met. Analyzes new and complex project related problems and creates innovative solutions involving finance, scheduling, technology, methodology, tools and solution components.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor’s Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master’s Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|---------------------|--------------|--|
| 22 | Project Manager III | 10 years | This position requires a Bachelor’s Degree in Accounting, Business, Finance, Management, Computer Science, or Engineering. |



3.15 Task Order Manager

General Summary

The Task Order Manager serves as the manager for small to medium sized, moderately complex task order(s) or a group of related task orders. The Task Order manager is responsible for the overall management of the specific task order(s) are implemented in a timely manner.

Principal Duties, Experiences & Responsibilities

Organizes, directs, and coordinates planning and production of all contract support activities. The Task Order Manager must have excellent oral and written communication skills with a demonstrated capability for dealing with all levels of management personnel, contract managers, and customer representatives. Also is responsible for the performance of all task order activities and order requirements and meets with appropriate Government management personnel, other contractor managers, and customer representatives.

Formulates and reviews strategic plans, marketing plans, subcontracting arrangements, and deliverables, determines tasks order costs and ensures conformity with contract terms and conditions. Responsible for ensuring coordination between personnel below then and all central management functions within the organization and between those central management functions and appropriate Government personnel.

In the absence of an assigned project manager, the Task Order Manager performs day-to-day management of project tasks, including budgeting, scheduling, and corresponding. He or she manages multiply teams of consultants, analyst, and other system professionals. Organizes and directs all activities of teams involved in analyzing, testing, documenting, converting, extending, and implementing the specific MOBIS tasks. Provides structure and ensures progression of working groups and teams by maintaining focus and avoiding unnecessary digression or duplication The Task Order Manager works with client’s systems designers and Subject Matter Experts (SME’s) and writes all reports documenting task and/or project status. He or she will interface with senior government executives and acquisition staff.

Assigns, schedules, and reviews work of subordinates. The Task Order Manager explains policies, purposes and goals of the contractor’s organization and the Government’s policies and procedures applicable to this contract to subordinates. Takes appropriate actions and coordinates policies and activities with appropriate Government personnel. Actively applies quality assurance measures to the management and performance of the task order. Familiar with standard concepts, practices, and procedures within a particular field and relies on experience and judgment to plan and accomplish goals and performs a variety of tasks. A certain degree of creative and latitude required.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor’s Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master’s Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|-----------------------|--------------|---|
| 23 | Task Order Manager I | 2 years | This position requires a Bachelor’s Degree in Management, or related field. Works under immediate supervision; reports to a supervision or manager, and management experience is a plus. |
| 23 | Task Order Manager II | 5 years | This position requires a Bachelor’s Degree in Management, or related field. Relies on experience and judgment to plan and accomplish goals. Directs and leads others and management experience is a plus. |



3.16 Technical Writer

General Summary

The Technical Writer writes a variety of technical articles, proposals, and management reports, brochures, and/or manuals for documentation for a wide range of users. Develops documents outlines in accordance with task standards and has excellent writing and editing skills. Maintains document development schedule and is responsible for coordinating the display of graphics and the production of the document. Works directly with system analysts and programmers to write and edit program and system documentation user manuals, training courses and procedures, as paper bound reports or in HTML for use over the internet/intranet.

Collects and organizes information required for preparation of moderately complex technical IT publications. Prepares written text and coordinates layout and organization of manuals and other documents according to prepared outlines and specifications. Researches available technical data including drawings, design reports, equipment, and test specifications. The Technical Writer may work with consultants, programmers, systems analysts, engineers, and other technical personnel to clarify document content.

Principal Duties, Experiences & Responsibilities

Develops, writes, and edits materials for reports, manuals, briefs, proposals, instruction books, catalogs, and related technical and administrative publications concerned with work methods and procedures, and installation, operation, and maintenance of machinery and other equipment. Experienced with process driven documentation and creating documentation for user guides and instruction manuals as it relates to software. The Technical Writer is an expert user of tools to produce documentation, such as; MS Word, Excel, VISIO and PowerPoint and is able to automate functions within tools if appropriate. Receives assignments from his or her supervisor and observes production, developmental, and experimental activities to determine operating procedure and detail. He or she interviews production and engineering personnel and reads journals, reports, and other material to become familiar with product technologies and production methods. Reviews manufactures and trade catalogs, drawings and other data relative to operation, maintenance, and service of equipment, and studies blueprints, sketches, drawings, parts list, specification, mockups, and product samples to integrate and delineate technology, operating procedure, and production sequence and detail. Organizes materials and completes writing assignment according to set standards regarding order, conciseness, style, and terminology. Reviews all published materials, recommends and develops revision or changes in scope, format, content, and methods of reproduction and binding. May maintain records or files of work and revisions and will ensure their proper security. The Technical Writer may select photographs, drawings, sketches, diagrams and charts to illustrate material. He or she may assist in laying out material for publications and arrange for typing, duplication, and distribution of material. Will also write speeches, articles, and public or employee relations releases and/or may edit, standardize, makes change to materials prepared by other writers or plant personnel.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|-----------------------------|--------------|--|
| 25 | Technical Writer/Editor I | 1 years | Requires a Bachelor's Degree or equivalent experience in information technology and works under general supervision and typically reports to a supervisor or manager. |
| 26 | Technical Writer/Editor III | 6 years | Requires a Bachelor's Degree or equivalent experience in information technology, and relies on experience and judgment to plan and accomplish goals. Directs and leads the work of others and management experience is a plus. |



3.17 Management Consultant

General Summary

The Management Consultant preforms a variety of management consulting tasks, either independently or under supervision that is broad in nature and is concerned with the fusion of a MOBIS project’s personnel, tools and techniques in order to provide MOBIS services to improve performance. The Management Consultant supervises team efforts through project completion.

Principal Duties, Experiences & Responsibilities

(1) Plans and preforms research and other assignments in conformance with the overall project planning of documents. (2) Is responsible for management portions of a major project or a project of lesser complexity. (3) The Management Consultant coordinates the activities of the administrative staff and other management consultants assigned to specific projects. (4) May perform other duties that are assigned.

The Management Consultant must have the skills to develop comprehensive business or organization strategies including analysis, research, obstacles assessment, planning, and business case development measuring tactical and strategic success factors. In addition, the individual must have experience knowledge of process assessment and development, ability to obtain and document methods of procedures and process workloads assessment. This position also requires the development of implementation action plans and business cases supported by tangible improvements in product productivity and quality.

The Management Consultant is responsible for advising, consultants and in limited cases preparing, updating and distributing program or project management products and/or services. Familiar with the use of Earned Value Management and advanced project management techniques and methodologies. Conducts independent investigations and maintains appropriate liaison with State and Federal Law enforcement/Regulator Agencies.

He or she is familiar with standards concepts, practices and procedures within a particular field. The Management Consultant may specialize in writing material regarding work methods and procedures. Relies on experience and judgment to plan ad accomplish goals. Performs a variety of complicated tasks, may report to a manager or department head, and requires a wide degree of creativity and latitude is expected.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor’s Degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master’s Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|---------------------------|--------------|--|
| 27 | Management Consultant I | 4 years | Requires a Bachelor’s Degree or equivalent experience in information technology and works under general supervision and typically reports to a supervisor or manager. |
| 28 | Management Consultant III | 10 years | Requires a Bachelor’s Degree or equivalent experience in information technology, and relies on experience and judgment to plan and accomplish goals. Directs and leads the work of others and management experience is a plus. |



3.18 Functional Area Analyst

General Summary

The Functional Area Analyst performs a variety of management consulting tasks, either independently or under supervision that is broad in nature and is concerned with the fusion of a MOBIS project's personnel, tools and techniques in order to provide MOBIS services to improve performance. The Management Consultant supervises team efforts through project completion.

Principal Duties, Experiences & Responsibilities

The Functional Area Analyst has a significant technical background and may be used in a MOBIS project where their special expertise is required in order to augment the team's understanding of the roles that logistics, legal matters, budgeting, accounting and financial issues, relevant computers or information technology systems, organizations operations, engineering areas, regulatory matters, communications environmental issues, etc. In addition, the individual must have an understanding of organizational issues, integration requirements and other management functions relevant to MOBIS project.

The Functional Area Analyst must have a minimum of five years of required functional area experience and relevant general experience in the area of expertise. The Functional Area Analyst shall be experienced in assessing requirements for new or modified technical or functional capabilities in the functional areas relevant to the MOBIS project and may perform other duties assigned.

The Functional Area Analyst is responsible for advising, consulting and in limited cases preparing, updating, and distributing program or project management products. He or she is familiar with the use of Earned Value Management and advanced project management techniques and methodologies. Conducts independent investigations, and maintains appropriate liaison with State and Federal Law Enforcement and Regulator Agencies.

Substitution of Education & Experience

Six (6) years of general experience is considered equivalent to a Bachelor's Degree. A Master's Degree is required in the relevant professional areas and/or equivalent professional certification (i.e., Certified Public Accountant, Certified Data Processor, Professional Engineer, Juris Doctorate, and/or License to Practice before State or Federal Courts or Master at Laws degree. Four (4) years of additional experience plus BS/BA is equivalent to a Master's Degree.

| | Job Title | Years | General Experience Specification & Education |
|----|------------------------------------|--------------|--|
| 29 | Functional Area Analyst Analysis I | 5 years | Requires a Bachelor's Degree or equivalent experience in information technology and works under general supervision and typically reports to a supervisor or manager. |
| 30 | Functional Area Analyst Analysis I | 10 years | Requires a Bachelor's Degree in Management or related field and works under general supervision and typically reports to a supervisor or manager. Management experience is a plus. |



4.0 MOBIS Pricelist Terms and Conditions:

4.1 MOBIS Scope, Terms, Conditions, and Limitations

The Contractor shall provide Management, Organization and Business Improvement Services (MOBIS) to authorized users of the Contract on a worldwide basis as specified in the task order placed by the ordering activity. The Contractor shall be required to provide all services in accordance with the requirements of any resultant contract and shall ensure effective performance of all services described herein. This section 2.0 excerpts the primary terms, conditions from the initial solicitation and contract award document, and is presented here for the convenience of the Ordering Agency.

The Pricing in the Pricelist Section 3.0 is submitted in accordance with the commercial practices (e.g., labor rates or fixed unit prices.) If pricing is based on labor rates, the Contractor shall supply and clearly define each labor category as provided on the Pricelist Pages – and - and further on Pages – through -. Each labor category definition must include experience, minimum training, certifications, if applicable and degrees. Although this acquisition is for management services, any labor category incidental to and in support of the MOBIS services must also be listed, priced, and defined.

The Contractor shall normally provide all resources including personnel, management, supplies, services, materials, equipment, facilities, and transportation necessary to provide a wide range of MOBIS services as specified in each task order. Services specified in a task order may be performed at Contractor’s facilities or the ordering agencies facilities. The Government will determine the Contractor’s compensation by any of several different methods (to be specified at the task order level) e.g., a firm-fixed prices for services with or without incentives, labor hours and or time-and-materials.

4.1.1 Summary of MOBIS Services and Products

These contracts cover management, organization and business improvement services and products (MOBIS) to enable government agencies to improve performance, quality, timeliness and efficiency throughout their organizations.

These services will facilitate agency’s response dynamic, evolutionary influences and mandates and will enable them to continuously improve mission performance. As these influences and mandates evolve, or are enacted, it is anticipated that the specific support provided by the Contractors under this schedule will evolve accordingly. These efforts should ultimately result in increased customer satisfaction and restore the public’s confidence in their Government. Some examples of these influences and mandates are the Government Performance and Results Act; government reinvention initiatives such as improving customer service, benchmarking and streamlining: strategic sourcing; downsizing; and privatization.

The contract covered by this schedule provides services and/or products to support agencies and the implementation and continuation of management, organizational and business improvement effort. Examples include but are not limited to; quality management; business process reengineering; strategic and business planning; benchmarking; strategic sourcing; ISO 9000 and ISO 14000; activity-based costing; financial management analysis related to an improvement effort; statistical process control;



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surveys; individual and organizational assessments and evaluations; process improvements; process modeling and simulation; performance measurement; organizational design change management; development of leadership/management skills; and training in improving customer service and satisfaction.

4.1.2 Services Outside the Scope of Contract:

Examples of services that are not appropriate for purchase under this MOBIS Schedule include, but are not limited to financial audits; performance of operational activities; purchase of automated data processing (ADP) hardware and purchase of ADP software development not specifically related to an improvement effort. This schedule is not intended to be used by agencies to do isolated or independent management and technical studies when the contractor is asked to produce a final report with little or no involvement of the agency management staff.

4.1.3 Support to be provided by the Government:

Contractors shall have access within reasonable limits to:

Government publications; archival materials; videotape; film; photo and graphic art repositories; and governmental employees as are necessary and appropriate to satisfy the contractor's information requirements in completing project work.

Managers and employees within agencies where work is being performed, that are essential to carrying out contractual obligations; one or more subject matter experts to advise and assist the contractor with respect of technical aspects or operating systems selecting for training or quality and productivity improvement; physical for carrying out work, such as room space, utilities drawn from existing sources, currently available instructional equipment such as computer terminals and audio visual display devices when such use does not conflict with the controlling organizations operational schedule, and technical reference material that is not subject to Privacy Act restrictions.

4.1.4 Maximum Order

If the "best value" selection places your order over the Maximum Order Level of \$1,000,000, you have an opportunity to obtain a better schedule contract price. Before placing your order, contact the contractor to ask for a better discount price.

The contractor may:

1. Offer a new lower price for this requirement.
2. Offer the lowest price available under the contract; or
3. Decline the order within five day.

A delivery order that exceeds the maximum order may be placed with the contractor selected [in accordance with ordering provisions provided herein. The order will be placed under the schedule contract. The minimum order that an agency can place under this contract \$300.00, the maximum order threshold for an agency placing orders under this contract is \$1,000,000 for all Special Item Numbers



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(SIN's). If your order exceeds \$1,000,000, we encourage you to seek further price reductions with the service provider. The maximum order level acts as a trigger device for the ordering agencies to request better pricing and terms, there is no maximum value for individual task orders.

4.1.5 Price Reductions

There may be circumstances when a customer agency finds it advantageous to request a price reduction, such as where the quantity of an individual order clearly indicates the potential for obtaining a reduced price. Customer agencies that obtain a further price reduction may still place these orders against the Schedule contract. MAS contractors will not be required to pass on to all schedule users a price reduction extended only to an individual agency for a specific order.

4.1.6 Blanket Purchase Agreements

Federal Supply Schedule contract contain BPA provisions to maximize your administrative and purchasing savings. This feature permits schedule users and contractors to set up "accounts" to fill a "reoccurring requirement." These accounts establish a period for the BPA and generally, address issues, such a frequency of ordering and invoicing, authorized callers, discounts, delivery locations and time. Agencies may qualify or the best quantity/volume discounts available under the contract, based on the potential value of business that may generate through such an agreement, regardless of the size of the individual orders. In addition, agencies may be able to secure a discount higher than that available in the contract based on the aggregate volume of business possible under the BPA. Finally, contractors may be open to a progressive type discounting where the discount would increase once the sales accumulated under the BPA reach certain prescribe levels. Use of a BPA may be especial useful with the new Maximum Order feature. Attached is a Suggested Format for customers to consider when using the purchasing tool.

4.1.7 Incidental items

For administrative convenience, open market (non-contract) items may be added to a Federal Supply Schedule BPA or the individual task/delivery order if the items re clearly labeled as such on the order, all application acquisition regulations have been followed, and price reasonableness has been determined by the ordering activity for the open market items.

4.1.8 Organizational Conflicts of Interest

Definitions:

"Contractor" means the person firm, unincorporated association, joint venture, partnership, or corporation that is a party to this contract.

"Contractor and its affiliates" and "Contractor or their affiliates" refer to the Contractor, its chief executives, directors, officers, subsidiaries, affiliates, subcontractors at any tier, and consultants and any joint venture involving the Contractor, any entity into or with which the Contractor subsequently merges or affiliates, or any other successor or assignee of the Contractor.



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A “Organizational conflict of interest” exists when the nature of the work to be performed under a proposal Government contract, without some restriction on activities by the Contractor and its affiliates, may either (i) result in an unfair competitive advantage to the Contractor or its affiliates or (ii) impair the Contractor’s or its affiliates’ objectivity in performing contract work.

To avoid an organizational or financial conflict of interest and to avoid prejudicing the best interests of Government, ordering offices may place restrictions on the Contractors, its affiliates, chief executives, directors, subsidiaries and subcontractors at any tier when placing orders against schedule contractors. Such restrictions shall be consistent with FAR 9.505 and shall be designed to avoid, neutralize, or mitigate organizational conflicts of interest that might otherwise exist in situations related to individual orders placed against the schedule contract. Examples of situations, which may require restrictions, are provided at FAR 9.508.

4.1.9 Approval of Subcontracts

The ordering activity may require that the Contractor receive, from the ordering activity’s Contracting Officers, written consent before placing any subcontract for furnishing any of the work called for in a task order.

4.2 Detailed Information About Ordering From MOBIS Schedules

The following ordering procedures were developed were by GSA Federal Supply Service to assist our customer agencies in the purchase of services that are priced at hourly rates. The following procedures for services priced GSA schedules at hourly rates apply to the MOBIS Schedule Contract.

FAR 8.402 contemplates that GSA may occasionally find it necessary to establish special ordering procedures for individual Federal Supply Schedules or for some Special Item Numbers (SIN’s) within a Schedule. GSA has established special ordering procedures for services that are priced on Schedule at hourly rates. These special ordering procedures take precedence over the procedures in FAR 8.402.

The GSA has determined that the rates for services contained in the contractor’s price list applicable to this schedule are fair and reasonable. However, the ordering office using this contract is responsible for considering the level of effort and mix labor proposed to perform specific task being ordered and for making a determination that the total form fixed price or ceiling price if fair and reasonable. When ordering services, ordering offices shall:

4.2.1 Prepare a Request for Quote (RFQ)

A performance-based statement of work that that outlines, at a minimum, the work to be performed, location of work, period performance, delivery schedule, applicable standards, applicable criteria and any special requirements (i.e., security clearances, travel, special knowledge, etc.) should be prepared.



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A Request for Quote should be prepared which includes the performance-based statement of work and requests the contractors to submit either a firm fixed price or a ceiling price to provide the services outlined in the statement of work. A firm fixed order shall be requested, unless the ordering office makes the determination that it is not possible to anticipate cost with any reasonable degree of confidence.

When such a determination is made, a labor hour quote may be requested. The firm fixed price shall be based on the hourly rates in the schedule contract and shall consider the mix of labor categories and level of effort required to perform the services described in the statement of work. The firm fixed price of the order shall also include any other incidental costs related to performance of the services ordered. The order may provide for reimbursements of travel costs and the rates provided in the Federal Travel of Joint Travel Regulations, or as a fixed price incidental item. A ceiling price must be established for the labor hour orders.

The request for quotes may request that the contractors, if necessary or appropriate, submit a project plan for performing the task and information on the contractor's experience and/or past performance factors.

4.2.2 Transmit the Request for Quotes to Contractors

Based upon an initial evaluation of catalogs and price lists, the ordering office should identify the contractors that appear to offer the best value (considering the scope of services offered, hourly rates and other factors such as contractors' locations as appropriate).

The request for quotes should be provided to at least (3) contractors if the proposed order is estimated to exceed the micro purchase threshold, but not to exceed the maximum threshold. For the proposed orders exceeding the maximum order threshold, the request for quotes should be provided to additional contractors that offer services that will meet the agency's needs. Ordering offices should strive to minimize the contractors' costs associated with the responding request for quotes for specific orders. Requests should be tailored to the minimum level necessary for adequate evaluation and selection for order placement. Oral presentations should be considered, whenever practical.

4.2.3 Evaluate Quotes and Select Contractor to Receive an Order

After responses have been evaluated against the factors identified in the request for quotes, the order should be placed with the schedule contractor that represents the best value and results in the lowest overall cost alternative (considering price, special qualifications, administrative costs, etc.) to meet the Government's needs.

The establishment of the Federal Supply Schedule Blanket Purchase Agreements (BPA's) for reoccurring services is permitted when the procedures outlined herein are followed. All BPAs for services must define the service that may be ordered under the BPA, along with delivery or performance periods,



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billing procedures, etc. The potential volume of orders under BPAs, regardless of size of individual orders, may offer the ordering office the opportunity to secure volume discounts. When the establishing BPAs ordering offices shall ----

Inform contractors in the request for quotes (based on the agency's requirement) if a single BPA or multiply BPs will be established and indicate the basis that will be used for selecting the contractor s to be awarded the BPAs.

Single BPA: Generally, a single BPA should be established when the ordering office can define the tasks to be ordered under the BPA and establish a firm fixed price or ceiling price for individual tasks or services to be ordered. When this occurs, authorized users may place the order directly under the established BPA when the need for services arises. The schedule contractor that represents the best value and results in the lowest overall cost alternative to meet the agency's needs should be awarded the BPA.

Multiple BPA's: When the ordering office determines multiple BPAs are needed to meet its requirements, the ordering office should determine which contractors could meet any technical qualifications before establishing the BPAs. When multiply BPAs are established, the authorized users must follow the procedures in 2.B above and then place the order with the Schedule contractor that represents the best value and results in the lowest overall cost alternative to meet the agency's needs.

4.2.4 Review BPAs Periodically

Such reviews shall be conducted at least annually. The purpose of the review is to determine whether the BPA still represents the best value (considering price, special qualifications, etc.) and results in the lowest overall cost alternative to meet the agency's needs.

4.2.5 Small Business Preference

The ordering office should give preference to small business concerns when two or more contractors can provide the service at the same firm fixed price or ceiling price.

4.2.6 Greatest Value

When the ordering office's requirement involves both products as well as professional services, the ordering office should total the prices for the products and the firm fixed price for the services and select the contractor that represents the greatest value in terms of meeting the agency's needs

4.2.7 Documentation

The ordering office, at a minimum, should document orders by identifying the contractor the services were purchased from, the services purchased and the amount paid. If other than firm fixed price order is



placed, such documentation should include the basis for the determination to use a labor hour order. For agency requirements in excess of the micro purchase threshold, the order file should document the evaluation of Schedule contractor's quotes that formed the basis for the selection of the contractor that received the order and the rationale for any tradeoffs made in making the selection.

4.2.8 Definitions

Task Request: An agency request to provide the products and services similar to those described in the contract tailored to the agency's requirement. The task request will include, at the minimum, a performance work statement for a particular requirement or project from an ordering agency that clearly specifies all tasks to be performed and products to be delivered under the task order; and ask for written or oral proposals from contract awardees. The task request is Not an actual task order – it is a request for proposals from the Federal Supply Schedule Contractors.

Task Order Proposal: the contractor's bona-fide proposal describing how it intends to accomplish the agency's requirements stated in the task request and at what price.

Task Order: An agency's written order to provide the products and services at the negotiated price. The task order will include, SINS/skill categories, hours/unit, price, period of performance, GSA contract number and ordering agency task order number.

4.2.9 Task Order Preparation

All costs associated with the marketing, development, proposal preparation, presentation, submission and negotiation in response to any task order process shall be borne by the Contractor.

4.2.10 License Agreements/Fees

Licensing fees may be offered to users, but they are to be negotiated with the users separately outside of this schedule. GSA will not negotiate or award licensing fees of any type.

4.2.11 Time of Delivery

Work on task orders shall begin at a time mutually agreed to by the contractor and the agency ordering the services and/or products. Completion of performance and delivery of receivables shall be in accordance with the delivery schedule established by the contracting officer of the ordering agency on the task order.

4.2.12 Inspection/Acceptance



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Schedule contractors shall only tender for acceptance those items that conform to the requirements of their contracts, The Government reserves the right to inspect or test any supplies or services that have been tendered for acceptance. The Government will require repair or replacement of nonconforming supplies or re-performance of nonconforming service sat no increase in contract price. The Government will exercise its post acceptance rights (1) within a reasonable time after the defect was discovered or should have been discovered; and (2) before any substantial change occurs in the condition of the item, unless the change is due to the defect in the item.

4.2.13 Commercial Item Warranty

The Contractor warrants and implies that the items delivered hereunder are merchantable and for use for the particular purpose described in this contract. NOTE: Agencies should review contractors' catalogs/price lists for unique contract warranties.

4.2.14 Changes

Changes in the terms and conditions of this contract may be made only by written agreement of the parties.

4.2.15 Excusable Delays

Schedule contractors are liable for default unless nonperformance is caused by an occurrence beyond the reasonable control of the Contractor and without its fault or negligence such as , acts of God or the public enemy, acts of the Government in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, unusually severe weather, and delays of common carries. Contractors are to notify the contracting officer in writing as soon as it is reasonably possible after the commencement of any excusable delay, setting forth the full particulars in connection therewith shall remedy such occurrence with all reasonable dispatch, and shall promptly give written notice to the contracting officer of the cessation of such occurrence. Contractors shall also notify the contracting officer of the activity agency in writing as set forth above when service is excepted to be delayed.

4.2.16 Cancellation for the Government's Convenience

The Government reserves the right to cancel any such contract, or any part hereof, for its sole convenience. In the event of such cancellation, a contractor shall immediately stop all work hereunder and shall immediately cause any and all of its suppliers and subcontractors to cease work.

Subject to the terms of this contract, the contractor shall be paid a percentage of the contract price reflecting the percentage of the work performed prior to the notice of cancellation, plus reasonable charges the contractor shall demonstrate to the satisfaction of the Government using its standard record keeping system. In addition, has resulted from the cancellation and shall not be required to comply with the cost accounting standards or contract cost principles for this purpose. This paragraph



does not give the Government any right to audit the contractor's records. The contractor shall not be paid for any work performed or costs incurred which reasonably could have been avoided.

4.2.17 Cancellation for Cause

The Government will cancel this contract, or any part hereof, for cause in the event of any default by a contractor, or if a contractor fails to comply with any contract terms and conditions, or fails to provide the Government, upon request, with adequate assurances of future performance. In the event of cancellation for cause, the Government shall not be liable to the contractor for any amount for supplies or services not accepted, and the contractor shall be liable to the Government for any/all rights and remedies provided by law. If it is determined that the Government improperly canceled this contract for default, such cancellations shall be deemed a cancellation for convenience.

4.2.18 Patent Indemnity

Contractors shall indemnify the Government and its officers, employees and agents against liability, including costs, for actual or alleged direct or contributory infringement of; or inducement to infringe, any United States or foreign patent, trademark, or copyright arising out of the performance of this contract, provided the Contractor is reasonably notified of such claims and proceedings.

4.2.19 Payments

Payments shall be made for items accepted by the Government that have been delivered to the delivery destinations set forth in the schedule contractors. The Government shall make payment in accordance with the Prompt Payment Act (31 U.S.C. 3903) and Office of Management and Budget (OMB) Circular A-125, Prompt Payment. Unless otherwise provided by the addendum to this contract, the Government will make payment in accordance with the clause FAR 52.232-33, Mandatory Information for Electronic Funds Transfer Payment, which is incorporated herein by reference.

In connection with any discount offered for early payment, time shall be computed from the date of the invoice. For the purpose of, computing the discount earned, payment check or the specified payment date if an electronic funds transfer payment is made.

4.2.20 Method of Payment

Payment Options: Payments by the Government under this contract, including invoice and contract financing payments, may be made by check or electronic funds transfer (EFT) at the option of the Government. If check or EFT payments are made, the Government may, as its option, also forward the associated payment information by electric transfer. As used in this clause, the term EFT refers to the funds transfer and may include the information transfer.

Imprest Funds: The Contractor agrees to accept cash payment for purchases made under the terms of the contract in conference with Federal Acquisition regulation (FAR) 13.404.

4.2.21 Advanced or Interim Payments



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Ordering agencies are to note that FAR 9.5 outline organizational conflicts of interest that it is the responsibility of the contractor to provide all resources needed for performance of a contract. For purchase of commercial items – and MOBIS is a commercial item acquisition – that the financing of the contract is normally the contractor’s responsibility. Please refer to FAR 32.2 for information regarding, “commercial advance payment”, commercial interim payment, and “delivery payment”, and for advisory and approval guidance.

4.2.22 Labor Hour Task Orders

The preferred type if task order to be placed against contracts under this schedule is firm fixed price. Labor hour task orders are permitted:

1. If it is at all possible, at the time placing the order to estimate accurately the extent and/or duration of the work as outlined in FAR 16.6.
2. The schedule contractor is designated as being able to accept labor hour task orders.

4.2.23 Organizational Conflicts of Interest

Ordering agencies are to note that FAR 9.5 outlines that organizational conflicts of interests are more likely to occur in contracts involving consultant or other professional services. Please refer to FAR 9.5 for definitions, applicability, and contracting officers responsibilities.

4.2.24 Oral Presentations

Ordering agencies are encouraged to use oral presentations as a means to streamlining their acquisitions of complex requirements through this Multiple Award Schedule. Oral presentations can save time, staff resources, and money.



BPA NUMBER _____

(CUSTOMER NAME)
BLANKET PURCHASE AGREEMENT

Pursuant to GSA Federal Supply contract number(s) GS-10F-0093R, Blanket Purchase Agreements, the Contractor agrees to the following terms of a Blanket Purchase Agreement (BPA) EXCLUSIVELY WITH (Ordering Agency)

- 1. The following contract items can be ordered under this BPA. All orders placed against this BPA are subject to the terms and conditions of the contract, except as noted below:

SPECIAL ITEM NUMBER

*SPECIAL BPA
DISCOUNT/PRICE

- 2. Delivery:

DESTINATION

DELIVERY
SCHEDULE/DATES

- 3. The Government estimates, but does not guarantee, that the volume of purchases through this agreement will be _____

- 4. This BPA does not obligate any funds

- 5. This BPA expires on _____ or at the end of the contract period, whichever is earlier

- 6. The following office(s) is hereby authorized to place orders under this BPA

OFFICE

POINT OF CONTACT

- 7. Orders will be placed against this BPA via Electronic Data Interchange (EDI), FAX or paper.



8. Unless otherwise agreed to, delivery tickets or sales slips containing the following information as a minimum must accompany all deliveries under this BPA:
 - a. Name of contractor
 - b. Contract number
 - c. BPA number
 - d. Special Item number
 - e. Task/Delivery order number
 - f. Date of purchase
 - g. Quantity, unit price, and extension of each item (unit prices and extensions need not be shown when incompatible with the use of automated systems; provided, that the invoice is itemized to show the information); and
 - h. Date of shipment
9. The requirements of a proper invoice are as specified in the Federal Supply Schedule contract. Invoices will be submitted to the address specified within the task/delivery order transmission issued against this BPA.
10. The terms and conditions included in this BPA apply to all purchases made pursuant to it. In the event of an inconsistency between the provisions of this BPA and the Contractor's invoice, the provisions of this BPA will take precedence.



6.0 Special Notice to Agencies – Small Business Participation

The Small Business Administration (SBA) strongly supports the participation of small business concerns in the Federal Supply Schedules Program. To enhance small business participation, the SBA policy allows agencies to include in their procurement base and goals, the dollar value of order expected to be placed against the Federal Supply Schedules, and to report accomplishments against these goals.

For order exceeding the micro purchase threshold, FAR 8.40 requires agencies to consider the catalogs/price lists of at least three schedule contractors or consider reasonable available information by using the GSA Advantage!, and the Federal Supply Service Home Page (www.fss.gsa.gov), contain information on a broad array of products and services offered by small business concerns.

This information should be used as a tool to assist ordering activities in meeting or exceeding established small business goals. It should be used as a tool to assist in including small, small disadvantage, and women owned small businesses among those considered when selecting price lists for a best value determination.

For orders exceeding the micro purchase threshold, customers are to give preference to small business concerns when two or more items at the same delivered price will satisfy their requirement.

7.0 Government Acquisition Principles and Federal Supply Schedules

In the spirit of the Acquisition Streaming Act (FASA), all Federal agencies have been encouraged to facilitate innovative contracting/acquisition approaches. FAR 1.102 provides Guidelines Principles on the Federal Acquisition System, outlining what the system will achieve:

- A. Satisfy the customer (cost, quality, and timelessness of delivery)
- B. Maximize use of commercial products and services
- C. Consider schedule contractor's past performance
- D. Promote competition
- E. Minimize administrative costs
- F. Conduct business with integrity, fairness and openness
- G. Fulfill public policy objectives

The Federal Supply Schedule Program is source customers may use to achieve what the system has outlined in the Acquisition Teams to follow.



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Each member of the “Acquisition Team” is to exercise personal initiative and sound business judgment and is responsible for making acquisition decisions that deliver that deliver the best value product or service to meet the customer’s needs.

FAR 1.102-4 further empowers government Acquisition Team members to make acquisition decisions within their areas of responsibility including selection, negotiation, and administration.

The ordering agency contracting officer has the authority to the maximum extent practical, to determine the applications of rules, regulations, and policies.

8.0 Basic Guidelines for Using “Contracting Team Arrangements”

In light of these changes, Federal Supply Schedule customers may refer to FAR 9.6-Contractor Team Arrangements. The policy and procedures outlined in this subpart will provide more flexibility and allow innovative acquisition methods when using Federal Supply Schedules.

Customers are encouraged to review this section and should note that the use of Contractor Team Arrangements is permissible after contract award of a GSA Schedule.

Contractor Team Arrangements, combined with the Federal Supply Schedules Program, provide Federal customers with a powerful commercial acquisition strategy.

Federal Supply Schedule contractors may use “Contractor Team Arrangements” (see FAR 9.6) to provide solutions when responding to a customer agency strategy.

These Contractor Team Arrangements can be included under Blanket purchase Agreement (BPA). BPAs are permitted under all Federal Supply Schedule contracts.

Orders under a Contractor Team Arrangement are subject to term and conditions of the Federal Supply Schedule contractors.

Customers should refer to FAR 9.6 for specific details on Contractor Team Arrangements.

Here is a general outline on how it works:

- A. The customer identifies the requirements.
- B. Federal Supply Schedule contractors may individually meet the customer’s needs, or
- C. Federal Supply Schedule contractors may submit a Schedule Contractors “Team Solution” to meet the customer’s requirements.
- D. The customer makes a best value selection.