DAVID Y. IGE
GOVERNOR

BONNIE KAHAKUI
ACCTING ADMINISTRATOR

STATE OF HAWAII

STATE PROCUREMENT OFFICE

P.O. Box 119
Honolulu, Hawaii 96810-0119
Tel: (808) 587-4700
email: state.procurement.office@hawaii.gov
http://spo.hawaii.gov
Twitter: @hawaiispo

June 6, 2022

TO:
Executive Departments/Agencies
Department of Education
Hawaii Health Systems Corporation
Office of Hawaiian Affairs
University of Hawaii
Public Charter School Commission and Schools
House of Representatives
Senate
Judiciary

City and County of Honolulu
Honolulu City Council
Honolulu Board of Water Supply
Honolulu Authority for Rapid Transportation
County of Hawaii
Hawaii County Council
County of Hawaii-Department of Water Supply
County of Maui
Maui County Council
County of Maui-Department of Water Supply
County of Kauai
Kauai County Council
County of Kauai – Department of Water

FROM: Bonnie Kahakui, Acting Administrator

SUBJECT: **Change No. 11**
SPO Vendor List Contract No. 19-19
NASPO VALUEPOINT PROCUREMENT OF ACQUISITION SUPPORT SERVICES (PASS)
RFP-18-002-SW
Expires: June 5, 2023

The following changes are made to the vendor list contract.

1. The vendor list contract is extended until June 5, 2023. Contractors' hourly labor rates are adjusted for allowed price increase per the Master Agreement for the next performance period.
2. Update the Points of Contact information for DOE, HART, County of Hawaii, Hawaii County Council, Kauai County Council.
3. Update State General Excise Tax (GET) and County Surcharge information.
4. Add provision for final payment on page 6.
5. Update website address for ASI;
6. Update website address for CAI.
7. Supplier information updated for Monterey Consultants, Inc.

The current vendor list contract incorporating Change No. 11 is available on the SPO website: http://spo.hawaii.gov. Click on *Price & Vendor Lists Contracts* at the home page.

If you have any questions, please contact Donn Tsuruda-Kashiwabara at (808) 586-0565 or donna.tsuruda-kashiwabara@hawaii.gov.

WHERE TO FIND:

Information on NASPO ValuePoint 1
Participating Jurisdictions 2
Points of Contact 2-3
Nonprofit Organizations 3
Contractors, Vendor Codes, Compliance, pCard, PO 4
Ordering Procedures 5-6
GET, Payments, Vendor and Product Evaluation 6
Categories and Descriptions 7-25
Labor Categories and Minimum Qualifications 26-29
Hourly Prices Per Labor Category 29
Contractor Information – ASI Government, Inc. 30
Contractor Information – Berry Dunn McNeil & Parker, LLC 31
Contractor Information – Center for Applied Innovation, LLC. 32
Contractor Information – Civic Initiatives, LLC 33
Contractor Information – Gartner, Inc. 34
Contractor Information – Ikaso Consulting, LLC 35
Contractor Information – ITSC Secure Solutions, LLC 36
Contractor Information – Mathtech, Inc. 37
Contractor Information – Monterey Consultants, Inc. 38- 39
Contractor Information – Public Knowledge, LLC 40
Contractor Information – Business Management Research Associate, Inc. 41
Contractor Information – Trust Consulting Services, Inc. 42

STATE OF HAWAII
STATE PROCUREMENT OFFICE

SPO Vendor List Contract No. 19-19
Includes Change No. 11
Effective: 6/6/2022

THIS SPO VENDOR LIST CONTRACT IS FOR AUTHORIZED BUSINESS ONLY.

NASPO VALUEPOINT
PROCUREMENT OF ACQUISITION SUPPORT SERVICES (PASS)

(NASPO ValuePoint Solicitation No. RFP-18-002-SW)
June 6, 2019 to June 5, 2023

INFORMATION ON NASPO VALUEPOINT

The NASPO ValuePoint Cooperative Purchasing Organization is a multi-state contracting consortium of state governments, including local governments, of which the State of Hawaii is a member. The NASPO ValuePoint Purchasing Organization seeks to achieve price discounts by combining the requirements of multi-state governmental agencies, and cost-effective and efficient acquisition of quality products and services.

The State of Hawaii is the current lead agency and contract administrator for the NASPO ValuePoint Procurement of Acquisition Support Services (PASS) contract. A request for competitive sealed proposals was issued on behalf of NASPO ValuePoint Cooperative Purchasing Organization, LLC and contracts were awarded to 16 qualified Contractors. The State of Hawaii has fully executed contracts with 12 Contractors, who are named as authorized Contractors in SPO Contract No. 19-19.

The following 13 categories are included in this contract for acquisition support services. (1) Specifications/Scope of Work Review, (2) Procurement Strategy/Acquisition Strategy Plan, (3) Independent Government Cost Estimate, (4) Market Research, (5) Cost & Pricing Analysis, (6) Solicitation Review or Preparation, (7) Source Selection, (8) Cost Realism Analysis, (9) Contract Development/Contract Formation, (10) Contract Management, (11) Vendor Performance Evaluation Program, (12) Procurement Policy, and (13) Category Management.

For additional information on this contract, visit the NASPO ValuePoint website at https://www.naspovaluepoint.org/portfolio/procurement-acquisition-support-services-2019-2024/.

PARTICIPATING JURISDICTIONS listed below have signed a cooperative agreement and/or a memorandum of agreement with the SPO and are authorized to utilize this vendor list contract.

Executive Departments/Agencies
Department of Education (DOE)
Hawaii Health Systems Corporation (HHSC)
Office of Hawaiian Affairs (OHA)
University of Hawaii (UH)
Public Charter School Commission
And Schools
House of Representatives (House)
Senate
Judiciary

City and County of Honolulu (C&C Honolulu)
Honolulu City Council
Honolulu Board of Water Supply
Honolulu Authority for Rapid Transportation (HART)
County of Hawaii
Hawaii County Council
County of Hawaii – Department of Water Supply
County of Maui
Maui County Council
County of Maui – Department of Water Supply
County of Kauai
Kauai County Council
County of Kauai – Department of Water

The participating jurisdictions are not required, but may purchase from this vendor list contract, and requests for exception from the contract are not required. Participating jurisdictions are allowed to purchase from other contractors, however, HRS chapter 103D and the procurement rules apply to purchases using the applicable procurement method and its procedures, such as small purchases or competitive sealed bidding. The decision to use this contract or to solicit pricing from other sources will be at the discretion of the participating jurisdiction.

POINTS OF CONTACT. Questions regarding the products listed, ordering, pricing, and status should be directed to the Contractor(s).

Procurement questions or concerns may be directed as follows:

Jurisdiction	Name	Phone	FAX	E-mail
Executive	Donn Tsuruda-Kashiwabara	586-0565	586-0570	donna.tsuruda-kashiwabara@hawaii.gov
DOE	Procurement Staff	675-0130	675-0133	G-OFS-DOE-Procurement@k12.hi.us
HHSC	Nancy Delima	359-0994		ndelima@hhsc.org
OHA	Christopher Stanley	594-1833	594-1865	chriss@oha.org
UH	Karlee Hisashima	956-8687	956-2093	karlee@hawaii.edu
Public Charter School Commission and Schools	Danny Vasconcellos	586-3775	586-3776	danny.vasconcellos@spcsc.hawaii.gov
House	Brian Takeshita	586-6423	586-6401	takeshita@capitol.hawaii.gov
Senate	Carol Taniguchi	586-6720	586-6719	c.taniguchi@capitol.hawaii.gov
Judiciary	Tritia Cruz	538-5805	538-5802	tritia.l.cruz@courts.hawaii.gov

Jurisdiction	Name	Phone	FAX	E-mail
C&C of Honolulu	Procurement Specialist	768-5535	768-3299	bfspurchasing@honolulu.gov
Honolulu City Council	Kendall Amazaki, Jr. Nanette Saito	768-5084 768-5085	768-5011	kamazaki@honolulu.gov nsaito@honolulu.gov
Honolulu Board of Water Supply	Procurement Office	748-5071		fn_procurement@hbws.org
HART	Dean Matro	768-6246		dean.matro@honolulu.gov
County of Hawaii	Diane Nakagawa	961-8440		Diane.Nakagawa@hawaiicounty.gov
Hawaii County Council	Diane Nakagawa	961-8440		Diane.Nakagawa@hawaiicounty.gov
County of Hawaii – Department of Water Supply	Ka'iulani L. Matsumoto	961-8050 ext.224	961-8657	kmatsumoto@hawaiidws.org
County of Maui	Jared Masuda	463-3816		jared.masuda@co.maui.hi.us
Maui County Council	Marlene Rebugio	270-7838		marlene.rebugio@mauicounty.us
County of Maui – Department of Water Supply	Kenneth L. Bissen Holly Perdido	270-7684 270-7684	270-7136 270-7136	ken.bissen@co.maui.hi.us holly.perdido@co.maui.hi.us
County of Kauai	Ernest Barreira	241-4295	241-6297	ebarreira@kauai.gov
Kauai County Council	Codie Tabalba Scott Sato	241-4193 241-4810	241-6349 241-6349	ctabalba@kauai.gov ssato@kauai.gov
County of Kauai – Department of Water	Marcelino Soliz	245-5470	245-5813	msoliz@kauaiwater.org

USE OF THIS VENDOR LIST CONTRACT BY NONPROFIT ORGANIZATIONS. Pursuant to HRS §103D-804, nonprofit organizations with current purchase of service contracts (HRS chapter 103F) have been invited to participate in the SPO price and vendor list contracts.

A listing of these nonprofit organizations is available at the SPO website: http://spo.hawaii.gov. Click on *For Vendors > Non-Profits > Cooperative Purchasing Program > "View the list of qualifying nonprofits eligible to participate in cooperative purchasing."*

If a non-profit wishes to purchase from an SPO price or vendor list contract, the nonprofit must obtain approval from each Contractor (participation must be mutually agreed upon, for example). A Contractor may choose to deny participation by a nonprofit. However, if a nonprofit and Contractor mutually agree to this arrangement, it is understood that the nonprofit will retain its right to purchase from other than an SPO price or vendor list Contractor(s).

CONTRACTORS. The following contractors are authorized to provide Acquisition Support Services. They have signed a Master Agreement with the State of Hawaii and a Participating Addendum with the Hawaii State Procurement Office.

Contractor	Master Agreement Number
ASI Government, LLC	19-19-02
Business Management Research Associates, Inc.	19-19-14
Berry Dunn McNeil & Parker, LLC	19-19-03
Center for Applied Innovation, LLC	19-19-04
Civic Initiatives, LLC	19-19-05
Gartner, Inc.	19-19-06
Ikaso Consulting, LLC	19-19-07
ITSC Secure Solutions, LLC	19-19-08
Mathtech, Inc.	19-19-09
Monterey Consultants, Inc.	19-19-10
Public Knowledge, LLC	19-19-12
Trust Consulting Services, Inc.	19-19-16

VENDOR CODES for annotation on purchase orders are obtainable from the *Alphabetical Vendor Edit Table* available at your department's fiscal office. Agencies are cautioned that the remittance address on an invoice may be different from the address of the vendor code annotated on the purchase order.

COMPLIANCE PURSUANT TO HRS §103D-310(c). Prior to awarding this contract, the SPO verified compliance of the Contractor(s) named in the SPO Vendor List Contract No. 19-19. *No further compliance verification is required prior to issuing a contract, purchase order, or pCard payment when utilizing this contract.*

PURCHASING CARD (pCard). The State of Hawaii Purchasing Card (pCard) is required to be used by the Executive department/agencies, excluding the DOE, HHSC, OHA, and UH, for orders totaling less than $2,500. For purchases of $2,500 or more, agencies may use the pCard, subject to its credit limit, or issue a purchase order.

PURCHASE ORDERS may be issued for purchases of $2,500 or more and for vendors who either do not accept the pCard, set minimum order requirements before accepting the pCard for payment or who charge its customers a transaction fee for the usage.

SPO VL CONTRACT NO. 19-19 AND APPLICABLE MASTER AGREEMENT NUMBER shall be typed on purchase orders issued against this vendor list contract (**Master Agreement No. 19-19-02** with ASI Government, LLC, **Master Agreement No. 19-19-03** with Berry Dunn McNeil Parker, LLC, **Master Agreement No. 19-19-04** with Center for Applied Innovation, LLC, **Master Agreement No. 19-19-05** with Civic Initiatives, LLC, **Master Agreement No. 19-19-06** with Gartner, Inc., **Master Agreement No. 19-19-07** with Ikaso Consulting, LLC, . **Master Agreement No. 19-19-08** with ITSC Secure Solutions, LLC, **Master Agreement No. 19-19-09** with Mathtech, Inc., **Master Agreement No. 19-19-10** with Monterey Consultants, Inc., **Master Agreement No. 19-19-12** with Public Knowledge, LLC, **Master Agreement No. 19-19-14** with Business Management Research Associates, Inc., **Master Agreement No. 19-19-16** with Trust Consulting Services, Inc.).

IMPORTANT NOTE:

Pursuant to Hawaii Revised Statutes (HRS) §103D-405(d) "Outside Contractors may be utilized to prepare specifications and work statements in the development of a solicitation. Contractors paid for those services shall be precluded from bidding on or receiving a contract when they participated in any way in the development of the solicitation package or any resulting contract." Because of the nature of the Master Agreement, the organizational conflicts of interest procedures and limitations set forth for the State of Hawaii in this request for proposals shall apply to Orders placed by ValuePoint Participating Entities.

ORDERING PROCEDURES

a. Agency shall prepare a uniform request for quotations to obtain responses from at least three (3) Contractors. Agencies may use the Uniform Request for Quotes, or a similar form. Fillable version of the form available on the SPO site. It is the agency's responsibility to give the Contractors a reasonable amount of time to prepare and submit the quote.

b. Each RFQ will describe the project needs based on the Scope of Work categories one through thirteen of the RFP. Task Orders will include a statement of work which defines the services and deliverables. The agency may determine that acquisition-specific training may be required due to knowledge transfer needs. The training needs shall be made part of the statement of work.

c. Each RFQ will require the Contractor to submit the names of each team member who will provide services throughout the contract period. The rate and description of each team member will be identified by the labor category as submitted by the Contractor. Agencies may request resumès or any other additional information about the team members to find out more about the expert level and experience that make up the team.

d. Contractor responds by the due date specified and includes the following:

    1. A recommendation(s) for tasks that will result in a deliverable(s) that respond to the agencies' project needs. Acquisition-specific training by the Contractor may also be necessary in order to produce the desired outcome. Consequently, training may be needed as one of the tasks.

    2. A breakdown of the number of hours for tasks by labor categories. The total price **shall be a firm fixed fee**.

    3. Description of Schedule of Performance Payment Milestones and project schedule.

e. Agency reviews and evaluates all quotes received. If a Contractor fails to respond by the due date specified, the agency shall document such failure in the procurement file. If a Contractor submits a late quote, it is the agency's decision to accept or reject a late quote submittal. The agency shall document the late submittal in the procurement file.

f. Agency determines best value based on agency's requirements of task order needs. Best value will be determined by price, technical and/or business

requirements/service viability, past performance and other pertinent factors determined by the using agency. Such determination shall be in writing and placed in the procurement file. Agency may choose to utilize SPO-010, Record of Procurement, or another form.

g. The Task Order Document shall be signed by the Contractor and agency PO or designee authorized to enter into a contract.

STATE GENERAL EXCISE TAX (GET) AND COUNTY SURCHARGE shall not exceed the following rates if seller elects to pass on the charges to its customers.

COUNTY	COUNTY SURCHARGE TAX RATE	STATE GET	MAX PASS-ON TAX RATE	EXPIRATION DATE OF SURCHARGE TAX RATE
C&C OF HONOLULU	0.50%	4.0%	4.7120%	12/31/2030
HAWAII	0.50%	4.0%	4.7120%	12/31/2030
COUNTY OF MAUI (including Molokai and Lanai)	0.0%	4.0%	4.1666%	No county surcharge
KAUAI	0.50%	4.0%	4.7120%	12/31/2030

The GET or use tax and county surcharge may be added to the invoice as a separate line item and shall not exceed the current max pass-on tax rate(s) for each island.

County surcharges on state general excise (GE) tax or Use tax may be visibly passed on but is not required. For more information on county surcharges and the max pass-on tax rate, please visit the Department of Taxation's website at http://tax.hawaii.gov/geninfo/countysurcharge.

PAYMENTS are to be made to the remittance address of the Contractor(s). HRS §103-10, HRS, provides that the State shall have thirty (30) calendar days after receipt of invoice or satisfactory completion of contract to make payment. Payments may also be made via pCard.

COMPLIANCE PURSUANT TO HRS §103-53. All state and county contracting officers or agents shall withhold final payment of a contract until the receipt of tax clearances from the director of taxation and Internal Revenue Service. This section does not apply to contracts of less than $25,000.

VENDOR AND PRODUCT EVALUATION. Form SPO-012, Evaluation: Vendor or Product, for the purpose of addressing concerns on this vendor list contract, is available to agencies at the SPO website: http://spo.hawaii.gov. Click on *Forms* on the home page.

PRICE OR VENDOR LIST CONTRACT AVAILABLE ON THE INTERNET at the SPO website: http://spo.hawaii.gov. Click on *Price & Vendor List Contracts* on the home page.

CATEGORIES AND DESCRIPTIONS

A. Acquisition Planning

Category One – Specifications/Scope of Work Review

After a need is determined, the quality, price and the performance of a product or service depend almost entirely on the purchase description used to communicate the requirement. If a specification was used as a method of describing the requirement, which mostly happens for services, that specification must be clear and concise. Challenges by potential suppliers, costly delays in completing a project or unnecessary problems further down the line are, in most instances, attributed to an improper, inadequate description of definition or requirements. The additional effort spent at the beginning of the procurement lifecycle increases the probability of full satisfaction in meeting the needs of the end-user, procurement and contract specialist and Contractor/supplier.

This category of services is for the **review and/or assistance in development** of a scope of work (SOW) or specification(s). If not available in-house, the technical specification development by a subject-matter-expert shall be obtained/contracted by the awarded Contractor(s) for this category. Services within this category are as follows:

1. Review Services

   Provide recommendation to amend/develop specifications/SOW to produce correct, clear, and concise obligations of all parties with respect to the needed goods or services. Review services shall include verification, validation, and recommendation so that the SOW/specifications for needed goods and/or service clearly identify how the specification/SOW may be amended/changed to reflect the following:

   - The wording of the scope shall be precise.
   - The overall message should be clear and understandable.
   - The specification should simplify the process.
   - The tolerances should be reasonable.
   - The scope/specification should provide a relatively easy process to verify acceptance or rejection.
   - The specification should be exact.
   - The specification should not be restrictive, but broad enough to allow competition. If, however, there is justification for a restrictive specification/SOW, the report/recommendation shall provide a clear explanation for the need of the restrictive specification.
   - The specification/SOW should provide some built-in flexibility that is applicable to the industry.

2. Requirement Analysis

   Requirement analysis is value analysis applicable to the writing of specifications or SOW to eliminate products and services that are not cost effective. Contractor shall identify and

make recommendations to specifications or SOW to ensure that an agency will obtain the best products or services or meet the goals that are available in the market at prices that are determined fair and reasonable.

Requirement analysis services shall include review, analysis and recommendation and clearly identify how the specification/scope of work may be amended/changed to reflect the following, as applicable:

- Eliminate a requirement that is not cost effective.
- Improve the quality level without impacting the cost(s).
- Describe requirement(s) of quality standards to increase the service life.
- Achieve total value, i.e. not only initial expense as the award factor.

3. Specification Writing (Technical)

Contractors' support team members shall possess strong communication skills and expertise in needed topics of and programs. In addition, technical writers must have the skills to research and effectively interview subject matter experts (SMEs), if they are not the SMEs themselves. The technical writer should gather information and communicate complicated ideas in a clear and informative manner.

Contractor(s) shall be able to provide specification writing services for all types of specifications, such as design, specifications, performance specifications, or market grades to name a few.

Contractor shall assist in development and preparation of pre-award Request for Information (RFI), Statements of Work (SOW), Statements of Objective (SOO) and other requirements documents. This effort includes assisting in researching and drafting specifications and standards, including Performance-based Work Statements (PWS); developing performance measures, providing consultation and recommendations; and coordinating requirements documents. Note: State to state may vary on what they call SOW, i.e. statement of work, statement of need, scope of work, etc.

Outputs: SOWs; SOOs; PWSs; and related documents, i.e. restrictive specifications justification.

Category Two – Procurement Strategy/Acquisition Strategy Plan

The procurement team is made up of stakeholders that will participate in developing the procurement strategy plan. Stakeholders are individuals who have an interest in the needed goods or services. These individuals provide a significant contribution to the effort based on their subject matter expertise of the project scope or deliverables. Depending on the complexity of the procurement, support services may be needed to develop the plan. Services within this category are as follows:

1. Procurement Plan Development/Review

Contractor shall provide services to include advice and recommendations for all elements in the plan, including approaches, options, strategies, risks, contracting methods, competition, sources, cost, milestone schedule, etc. If not available in-house, the subject-matter-expert(s) shall be obtained/contracted by the awarded Contractor(s) for this category. The plan should contain the following information:

Acquisition Background
Description of Requirement/Statement of Need
Conditions
Background and Contract History
Contract Type: Unit costs or lump sum
Performance Period
Capability and capacity of Performance
Estimated Schedule
Estimated cost/budget

Plan of Action
Service Description
Potential Sources
Market Research Results/Interested Sources
Acquisition Approach
Competition
Source Selection Procedures
Contracting Considerations or Incentives
Other Considerations

Contract Administration
Surveillance: Monitoring timelines with milestones
Monitoring performance during contract period
Verifying contractor's performance of SOW through checklist(s)

2. Research/Reports

The Contractor shall research existing Government-wide contracts for available products and services. Contractor shall evaluate different approaches to and sources for acquisition support. Contractor shall research available suppliers and compare the services and costs of obtaining support from different providers. Information gathered shall be provided in a report form for use in the development of a procurement plan.

Contractor shall provide advice and recommendation for all elements in acquisition plans, including approaches, options, strategies, risks, contracting methods, competition, sources, cost, milestone schedule, etc. Research existing Government-wide contracts for available products and services. Evaluate different approaches to and sources for acquisition support. Research available suppliers and compare services and costs of obtaining support from the different providers.

Outputs: Written acquisition/procurement plans.

Category Three – Independent Government Cost Estimate

An Independent Government Cost Estimate (IGCE) is a tool developed by government personnel to estimate the costs incurred by a Contractor in the performance of a contract. An IGCE is generated by the government, who may utilize and obtain input from an outside Contractor. Such Contractor remains confidential and will not be allowed to respond to a solicitation for which it participated in the IGCE in any manner whatsoever. The IGCE is an unbiased realistic cost

estimate that reflects a clear understanding of the requirements. IGCEs serve various functions as:

- A projected, anticipated, or probable cost;
- A benchmark for establishing cost/price analysis;
- An analysis of reasonable and required resources to perform the contract; and
- A justification for decisions made throughout the procurement life cycle.

Specifically, IGCEs are used to project and reserve funds for acquisitions, determine if assumptions in a cost proposal are based on the same or similar assumptions, and determine fair and reasonable pricing.

This category of services is for **consultation and/or <u>assistance</u> in the development** of IGCEs. Government agencies do not always have sufficient resources or expertise to conduct these cost estimates on their own and may rely on third-party Contractors to generate these reports on their behalf. Contractors providing these services under the resultant cooperative agreement shall be required to sign non-disclosure agreements and may not have a vested interest in the contract for which the Contractor is generating the estimate. Contractor must be unbiased and objective in its approach and methodologies.
Services within this category are as follows:

1. <u>Data Collection</u>

   Contractor shall collaborate with the agency to gain a thorough understanding of the contract scope of work for which the IGCE is being generated. Contractor shall establish a plan that identifies stakeholders and other resource requirements necessary to generate the IGCE, including a schedule that specifies the start date and delivery date for the final report, and a list of all potential sources of information required to complete the cost estimate.

   At a minimum, the Contractor shall request and receive the following information:

   - Statement of Work (SOW) and supporting scope documents (solicitations, drawings, plans, etc.)
   - Any agency-developed cost estimates or contractor cost proposal and technical approach.
   - Basis of Estimate (BOE), including a description of the scope, methodologies, references and defining deliverables, assumptions and exclusions, clarifications, adjustments, and level of uncertainty.

   Other documentation or information that is useful in performing an IGCE include, but are not limited to:

   - Past purchases of similar products or services
   - Market research and knowledge of current economic conditions
   - Proposal narrative, including background
   - Work Breakdown Structure (WBS) and WBS Dictionary
   - Project schedule
   - Risk management plan

- Rates for fees or other mark-ups
- Lists of government-furnished property, equipment or services
- Cost estimate back-up documentation such as contracted labor rates and associated mark-ups, subcontracted quotes, specification sheets, purchase orders, and catalog cut sheets

2. Sufficiency Review

Once all requested information has been received, Contractor shall review the information for sufficiency to ensure adequate quantity and quality of data exists to develop an accurate and effective IGCE. The Sufficiency Review serves to:

- Determine all costs involved in performing the contract scope of work, including any direct and indirect costs as well as contractor profits and fees.
- Examine the information to ensure that it meets the technical requirements for its intended purpose.
- Determine whether the information is clearly documented, well organized, and presented at an appropriate level of detail, and that summary documents are traceable to the supporting documentation.
- Look at the depth and breadth of the supporting documents, and data contained therein.

The Sufficiency Review may determine that certain documentation is insufficient for proceeding with the cost estimate. In such instances, Contractor shall notify the agency, provide a list of the documents that are insufficient, and provide reasons for the finding or specific information needed to make the document acceptable.

3. Data Analysis

Data Analysis consists of two components: review and analysis.
The review component consists of an-depth examination and qualitative analysis of all the sufficient information requested and received as part of Data Collection. Contractor shall conduct a thorough review of the SOW, agency-developed cost estimates or contractor-developed cost estimate or proposal, BOE, and any other sufficient information received. Contractor shall apply the appropriate estimating methodologies to the data to generate the IGCE.

Once the IGCE is generated, the estimate must be validated. Contractor shall employ the appropriate cost-validation techniques to test the cost estimate and determine whether it is reasonable and includes all necessary costs. Some commonly-accepted techniques include spot checking and preparing a check estimate. Offerors shall detail in their proposals the cost-validation techniques they utilize to validate cost estimates.

4. Results Reporting

Contractor shall prepare an in-depth IGCE report detailing its findings. The IGCE report prepared by the Contractor shall describe the BOE and provide the agency with recommendations based on the findings to assist in decision-making throughout the

procurement life cycle. Contractor may be required to update the IGCE report as the acquisition progresses through the different phases of the procurement life cycle.

Contractor shall provide services that may include but are not limited to research and analysis of past purchases of similar products or services, current market value of the products or services, or other agency purchases of similar products and services.

Outputs: IGCEs.

B. Market Research

Category Four – Market Research

Market Research is a necessary step to identify available sources to meet the needs of any given solicitation. Market research refers to the examination of available sources to find the available sources of supply which may identify critical business requirement. Due to limited resources or timing, agencies may require the assistance of an outside Contractor to provide necessary data to develop a solicitation that will reach the widest distribution possible.

This category of services is for **consultation and/or assistance with market research services.** Services within this category are as follows:

Market Research Services – Contractor shall research available suppliers and compare the services and costs of obtaining goods or services from difference providers. Information gathered shall be provided in a report form for use in the development of a competitive solicitation. Contractor shall provide advice and recommendation for all elements in market research, including approaches, options, strategies, risks, methods, competition, sources, cost, milestone, etc. Research existing Government-wide contracts for available products and services. Research available suppliers and compare services and costs of obtaining support from the different providers.

The market research team should consider the following:

- The overall budget for the project should be clearly stated and the funding source should be identified prior to commencement of services.
- The Market Research Plan should be agreed upon by all parties before any commencement of services.
- The methodology to be used should be clearly specified and agreed upon by all parties.
- The research should have a simplified process.
- The target markets should be clearly identified.
- The research should be broad enough to capture the largest possible data set.
- The research should not be overly restrictive.
- The research should provide some built-in flexibility that is applicable to industry.

Outputs: Market research documentation.

Category Five – Cost & Pricing Analysis

A Cost & Pricing Analysis conducted before a Request for Proposal (RFP) is released will assist a State in determining how to capture all costs related to a project, determine which method is best for evaluating cost, and if the budget for said project is realistic. Cost & Pricing Analysis is a key component to predicting the viability of a project. Because of limited resources or timing, agencies may require the assistance of an outside Contractor to assist with a Cost & Pricing Analysis for stakeholder review.

Cost & Pricing Analysis may also be conducted after BAFOs are received. And Cost & Pricing Analysis may also be conducted post award for contract renewals, modifications or assistance in determination of termination due to non-compliance with contract terms.

This category of services is for **consultation and/or <u>assistance</u> with cost & pricing analysis services.** Services within this category are as follows:

<u>Cost & Pricing Analysis</u> – Contractor shall assist in developing estimated cost and price elements for the work to be performed to prepare analyses for Stakeholders to make sound decisions on the financial viability of a project.

Cost & Pricing Analysis services shall include, but are not limited to:

- Developing plans and alternatives for effective price competition
- Informing states of impact of budget on technical, contract, and pricing outcomes
- Developing approach for State's/Stakeholder's budget planning
- Developing cost proposal solicitation documents to aid states in the development of the RFP
- Analyzing contracts/programs to assess price competitiveness
- Providing alternatives and research for stakeholders
- Providing estimates (case-by-case based on need of State/Stakeholder).
- Demonstrating value of RFP and/or new system/product to State/Stakeholder
- Providing a Make-or-buy analysis
- Providing a Go, no-go analysis
- Developing and analyzing BAFO requests
- Determining that the prices submitted by Offerors are acceptable, fair and reasonable
- Providing cost analysis during RFP evaluation – services performed to help States/Stakeholders analyze the cost proposals of several vendors to find best value
- Developing evaluation support documentation to help States/Stakeholders validate the reasonableness of proposed labor rates as well as indirect rates (fringe, overhead, general and administrative, and materials)
- Performing independent review of each cost element within an Offeror's cost proposal
- Providing post-award services (contract renewals, modifications, assistance in determination of termination if not in compliance with contract terms)
- Burn Rate Analysis
- Analysis of Change Orders & Modifications
- Award fee/incentive fee analysis
- Closeout payment analysis

Outputs: Cost and pricing analyses.

C. Solicitation & Award

Category Six – Solicitation Review or Preparation

The solicitation document is the official document inviting the vendor community to respond to the needs of the government entity. The solicitation should foster competition and ensure fair and equitable treatment of interested parties. Competition has multiple levels. Competition exists not only in prices but also in the technical competence of the vendors and in the quality of their products or services. The request for proposal process allows the opportunity for vendors to submit innovative solutions, increasing the Government's latitude of choice and assuring the reasonableness of costs.

This category of services is for the **review and/or development** of a solicitation document. Services within this category would be as follows:

1. Review Services

   Contractor shall provide a recommendation to amend/develop any part of the solicitation document to produce correct, clear, and concise obligations of all parties with respect to the needed goods or services. Review services shall include verification, validation, recommendation to improve at minimum the following sections of the solicitation:

   - Scope of work, statement of work or specifications
   - Standard bid/proposal clauses such as bid guarantee, indemnification, intellectual property rights, insurance, etc.
   - Evaluation criteria
   - Bidder/Offeror qualifications
   - Proposal format
   - Administrative and Technical Response Requirements
   - Price and Cost sheets
   - Contract administration, post award
   - Payment terms.

2. RFP Development

   Contractor shall develop and prepare the solicitation document, which may be a request for quotes (RFQ), request for proposals (RFP), including two-step process solicitation or any other hybrid solicitation within the system of that State. The solicitation shall include all appropriate solicitation terms and conditions applicable.

Outputs: Solicitations

Category Seven – Source Selection

The nature of the source selection planning process, the techniques for obtaining information, the procedures used in evaluation, and the decision-making methods vary from procurement to procurement. Source selection planning entails: preparing to receive bids or proposals, preparing to apply evaluation criteria, and determining standards to select a Contractor. Proposals are often separated into technical and price sections with each evaluated separately. Evaluation may be complex, requiring a panel of experts. Some proposal evaluation may require a consultant's assistance. The Source Selection Plan (SSP) should include: evaluation criteria, evaluation standards, weighting system, screening system, and source selection process.

This category of services is for **assistance in preparation of a source selection plan and source selection activities.** Services within this category are as follows:

Source Selection – Contractor shall develop and prepare source selection plans, in accordance with State statute and rules; instruct evaluation team members on roles and responsibilities; act in the capacity of an advisory role during the evaluation, which may include cost estimating or technical subject matter expertise; ensure Conflict of Interest/Nondisclosure forms are signed; prepare evaluation sheets or score sheets; and prepare draft of source selection decision memorandum.

Outputs: Source Selection Plans (SSP), Evaluation Sheets

Category Eight – Cost Realism Analysis

Cost Realism Analysis is usually conducted after cost proposals have been received in response to a RFP. Cost Realism Analysis may be requested by States to determine if all components of cost have been contemplated from all vendors. Determining if cost proposals are acceptable and fair will assist States in a successful evaluation and award of a contract which is in the best interest of the State. Cost realism is about the system of logic, the assumptions about the future, and the reasonableness of the historical basis of the estimate. It's about the estimating information (cost data) that makes up the foundation of the estimate.

This category of services is for **consultation and/or assistance with cost realism analysis services.** Services within this category are as follows:

Cost Realism – Contractor shall independently review and evaluate specific elements of each Offeror's proposed cost estimate to determine whether the cost estimate is realistic for the work to be performed; reflects a clear understanding of the requirements; and is consistent with the unique methods of performance and materials described in the Offeror's technical proposal. Cost realism analysis is conducted by evaluating the supportive data that form the bases of the individual elements of cost to determine probable cost of the performance. The probable cost shall be used for the purposes of evaluation to determine the best value. The probable cost is determined by adjusting each Offeror's proposed cost, and fee when appropriate, to reflect any additions or reductions in cost elements to realistic levels based on the results of the cost realism analysis.

Probable Cost Estimate: is the Purchasing Entity's estimate of what it will cost for the Offeror to complete the contract based on the Purchasing Entity's evaluation of the offeror's technical proposal and proposed costs. This estimate is complimentary with and must be performed in

conjunction with all cost realism analyses and is a principal product of the Purchasing Entity in the source selection evaluation process.

Cost Realism services shall include, but are not limited to:

- Determining the Offeror's price is realistic for the work proposed
- Understanding and implementation of contract risk factors
- Developing a Purchasing Entity's probable cost estimate
- Conducting cost to technical realism analysis

Outputs: Cost realism analyses.

D. Contract Management

Category Nine - Contract Development/Contract Formation

The goal of contract development is to reduce in writing contract goals, contract type and contract elements. Identification of contract goals include the description of goods or services; delivery information (if applicable); protection of the financial interests of the agency; and any potential areas of dispute such as defining acceptance, handling wrong product, delays, personality conflicts, breach, payment or changes in a contract. The goals also include change order procedures.

Contractor shall provide assistance to the government entity in the formulation of the contract between the awarded vendor and government entity.

This category of services is for **consultation and/or assistance with contract development.** Services within this category are as follows:

Contract Development

Requirements of the contractor, and/or their sub-contractor will include:

- A general working knowledge of each individual state's procurement rules and regulations.
- A general working knowledge of the entity's General Terms and Conditions.
- Appropriate staff with the level of experience to handle the different needs or difficulties of the contract.
- To be able to work with the state entity to develop a schedule for completion of the contract.
- Must have existing legal staff available to vet the contract for each entity's legal requirements.
- Must be able to interact with the awarded vendor's attorney to produce a contract that is amicable to both parties.
- Must be able to format the contract to the entity's preference.
- Must provide pricing for the different levels of staffing that will provide service.
- Will be required to be available to handle supplemental agreements or legal issues that arise out of the formation of the contract for the duration of the contract.

Outputs: Contract documentation.

Category Ten – Contract Management

Contract management refers to post-award type activities, such as contract implementation, contract administration, measurement of work completion and payment computation. Moreover, it involves the monitoring of a contract, making important changes and modifications to the contract and dealing with related problems. Activities in contract management facilitate a positive working relationship between the government customer, procurement staff, and the contractor for the successful implementation of the contract award. Acquisition consultants can assist the government procurement staff and program managers in

various capacities of administration and facilitation with the contractor, not including any inherent governmental duties.

Services within this category are as follows:

1. Contract Administration

Manage the relationship between the Contractor and end user, including the monitoring of contract fulfillment on the part of government agencies. Development of the Contract Administration Plan (CAP) which will define how the contract will be administered. Monitor contractor compliance with terms of the contract, including site visits and labor interviews.

The CAP provides a mechanism to reconcile the various contract documents and the order of precedence into a management tool that can be used to focus and govern implementation activities. The plan itself will vary based on the complexity, risk, and scope along with the requirements of each contract. In many cases, a CAP should only be developed for high-risk or highly complex procurements. The frame of the plan should focus on the Who, What, When, Where, and How of contract administration. CAPs generally address a common set of topics, with particular emphasis on process, output, and outcome. In government contract management, there may be less emphasis on the "process" the contractor uses to achieve the goals of the contract than of the achievement of the expected outputs and outcomes.

While Contract Administration Plans generally share a similar structure, the inclusion of each topic into the CAP should be chosen based on necessity rather than out of formality. Contract Administration Plan topics may include:

- Project description
- Period of performance
- Schedule, critical milestones and/or delivery dates
- Critical path tasks and deliverables
- Roles and responsibilities
- Data and reporting
- Inspection and acceptance
- Personnel requirements
- Testing
- Warranty provisions
- Watch list items
- Special terms and conditions
- Insurance
- Process for managing change and issue resolution

Outputs: Performance Workplan or CAP; Documentation of Contract Performance such as Observation Record, Compliance Record, Discrepancy Record, Unsatisfactory Performance Report, Summary Evaluation Report, Contractor Status Report.

2. Vendor Performance Plan Development/Review

The Contractor shall have experience drafting comprehensive plans outlining the agency and vendor responsibilities and requirements in an easy to understand document. The

plan must describe processes needed and recommend tools that will guide the contracting agency through the vendor performance evaluation. The plan shall include, but not be limited to, how to:

- Improve communication between buyers and vendors regarding performance
- Encourage better performance and accountability through incentives and penalties
- Enable performance analysis through Key Performance Indicators (KPI) and benchmarking
- Capture performance data
- Identify strategic priorities and set targets
- Capture performance data
- Meet strategic priorities and improve programs

The plan shall include the method for scoring and weighting the evaluation criteria and how scores shall be tied to an award or incentive fee determination along with penalties. The plan shall explain how Contractors must receive evaluation criteria, be informed of their performance during the contract, be debriefed at the end of the contract and deal with appeals.

3. Contract Modifications

Assist in the preparation of incentive and award fees. Incentive fees are typically dependent upon the performance over a given period and are usually taken in relation to a benchmark index. Award fees provide an additional profit or fee amount that may be awarded, in whole or in part, based upon periodic evaluations of ongoing contractor performance. Assist in review of directed changes, formal changes to the original contract resulting from the buyer's actions or directions that impact the cost or schedule for performance. Determine if a constructive change has occurred, that is, any action or inaction on the part of the agency that has not been made through a formal change order, which causes the Contractor to perform additional work outside the scope of the original contract. Contractor can assist government procurement staff and program managers in review and recommendation to make the appropriate contract modification.

Outputs: Award or incentive fee determinations; contract modification determination.

E. Completion & Closeout

Category Eleven – Vendor Performance Evaluation Program

Contract closeout involves several activities. Unlike a purchase order where receipt of the items ordered and subsequent payment constitute closure, a contract requires documentation to the contract file that includes a written report with the description and analysis of the Contractor's performance. A quality vendor performance review (aka performance evaluation) assesses how the vendor is performing against Key Performance Indicators (KPI)'s and Service Level Agreements (SLA)'s established in the vendor's contract. However, it can also show non-contractual performance issues, such as incidents that aren't measured by a service level.

This category for services is for the assistance in the development and implementation of a Vendor Performance Evaluation Program. This does not include vendor performance evaluation for construction contracts. Services within this category are as follows:

<u>Evaluation Program</u>

The contractor shall understand and have insights into the requirements needed to develop a vendor performance evaluation program. The contractor shall work with the contracting agency to determine information that is useful in creating a vendor performance evaluation to include, but not limited to:

- When the vendor performance evaluation is needed and how often it should be measured.
- The KPI's, such as contract compliance, customer satisfaction, cost competitiveness, cost control, continuous improvements, and timeliness should be clearly identified along with formulation of templates for the evaluation which shall become standardized.

Output: Key Performance Indicators, Vendor Performance Evaluation Program

F. Other Services

Category Twelve – Procurement Policy

Procurement planning is part of the annual budgeting process. Each departmental head is responsible for planning his/her project's estimated procurement needs on an annual basis through the use of the annual procurement plan (APP), which indicates the items to be bought in the various quarters of the year.

Services within this category are as follows:

Procurement Policy Writing – Contractor shall assist in developing a high-level overall plan embracing the general goals and acceptable procedures as it relates to the expenditure of governmental funds
Procurement Policy services shall include, but not be limited to, writing procedures for:

- Appointing and paying consultants
- Appointing and paying temporary staff
- Appointing and paying casual workers
- Procurement planning for good and services
- Vendor Selection, to include:
    - Selection criteria
    - Use of dealers and sole suppliers
    - Recurring purchases
- Procurement Processes
- Procurement Controls

Outputs: Policy analysis and briefings. Policy guides and handbooks.

Category Thirteen – Category Management

Category management is a strategic approach to purchasing that allocates a government's procurement resources into specific categories of spending to be analyzed by category managers and aligned with the marketplace through in-depth spend and market analyses.

The main objective of Category management is to build efficiencies and maximize purchasing decisions across the agency by reducing duplication in the contracting process; better leveraging the government's buying power, and promoting the use of innovative and best in class solutions.

By consolidating purchases into main areas of spend, category management serves to move the government away from managing purchases and evaluating prices individually across multiple purchasing units to more directly managing entire categories of common spend to deliver better value for the entire agency.

This category for services is for the **assistance in development and implementation of** an action plan for Category Management or Product and Service Catalogs. If not available in-house, the action plan development or implementation by a subject-matter-expert shall be

obtained/contracted by the awarded contractor(s) for this category. Services within this category are as follows:

1. Data analysis

   The Contractor shall have knowledge of principles and practices in public procurement including category management and have a clear understanding of various types of commodities and government services. Contractor shall be well versed in data analysis including the collecting of historical procurement data and analyzing agency spend data and procurement needs. The contractor shall also conduct in depth spend analysis using the agency's existing code structure (NIGP, NAICS, UNSPC or other). If no code structure exists, the vendor will help to consolidate minor categories and identify major categories of spending.

2. Supplier analysis

   The Contractor shall have in-depth knowledge of the supplier marketplace and current economic conditions. The contractor will conduct market analysis to align the identified major categories of spending with the marketplace. Suppliers in the marketplace will be analyzed on their market share, historical changes and overall business health. Emphasis will be put on identifying suppliers that are looking to gain market share and can be leveraged for best prices; and identifying overlaps in suppliers to consolidate categories.

3. Action plan development

   The Contractor shall have experience developing specifications and scopes of work aimed at creating efficiencies and reducing costs, developing and executing procurement strategies, driving process improvements and effectively instituting key performance metrics. The contractor shall develop, draft and assist in the execution of an action plan that details the findings of the data and supplier analyses and provide recommendations for implementing category management organization/agency-wide. Action plans should be inclusive of procurement organization and process changes, including timelines and flow charts of how the organization will move from its existing purchasing structure into a category management structure.

   The action plan shall include but not be limited to:

   - The purpose, strategic mission and vision associated with the new organization direction and structure of the organization/agency.

   - The development of an ongoing program to analyze purchasing trends, develop options to reduce costs, improve timely delivery, and enhance the purchasing agencies supplier management strategies, including; performance tracking, benchmarking and planning for future category adjustments.

   - The development of a system by which the agency can monitor and track spending data including but not limited to information pertaining to what the agency buys, who it buys it from and what it pays.

- The step by step walkthrough and explanation of requirements for a phased in approach to reorganizing the existing workforce and hiring additional employees to successfully implement a Category Management organization/agency/office structure.

4. Organizational restructure

   The contractor shall have knowledge of staffing and management practices as it relates to structuring and organizing a workforce for Category Management. The contractor will be responsible for identifying, communicating and working with stakeholders to identify category managers, category workforce and acquisition workforce. As these stakeholders are identified, the contractor shall collaborate to share the knowledge of the analyses, create insights and training designed to serve all stakeholders and align staff with the strategic vision. The contractor will assist in overseeing all hiring and management decisions during implementation to ensure that staffing choices align with the Category Management structure. The contractor will assist in the development of staff evaluations designed to encourage performance and competency within the organization/agency. Upon completion of the restructuring, the contractor shall conduct “a lessons learned” and benchmark/milestones presentation to empower the organization/agency to move forward without the need for continuing assistance or consultation.

5. Product and Service Catalogs

   The contractor shall have knowledge and experience in e-sourcing and strategic sourcing, including the building of catalogs to consolidate purchasing categories and create ease of access for purchasing agencies. The Contractor shall follow the steps for category management including data and supplier analysis and the creation of an action plan designed for the implementation of organization/agency-wide electronic catalog services. The contractor may assist in the development of specifications and evaluation metrics for selecting an appropriate e-catalog provider. The contractor shall also assist in the creation of data collection procedures to track catalog purchases and consolidate catalog categories.

The Contractor shall assist in the planning and implementation of a Category Management procurement process and structure. This effort including assisting in data and supplier analysis as well as the restructuring and staffing of the workforce needed to meet the need of a Category Management system. The contractor may rely on third party tools, methods and best practices to properly empower the contracted organization. All information and insights gathered including the best-perceived path forward will be summarized in an action plan, the overarching document for this category that explains all necessary steps to move forward. After the delivery and acceptance of the action plan, the contractor may assist agencies in implementing the changes proposed, including, but not limited to, establishing measurements to track and grow the categories. This includes coming up with benchmarks, projecting future opportunities for efficiencies and category streamlining, creating dashboards and data analytic tools to track the progress of category spend against the benchmarks and creating supplier performance metrics to evaluate suppliers as the categories mature.

Organizations/Agencies may contract through this category for the development of a Product and Services Catalog. The catalog service can be contracted as a stand-alone service or in addition to the Category Management system. Contractors shall deliver an action plan similar to that required for Category Management outlining the steps needed to implement an online Catalog. After delivery and acceptance of the action plan, the contractor may assist in the implementation of the Product and Services Catalog including but not limited to the acquisition of required software and the rollout of the Catalog to the vendor community.

Outputs: Action Plan, Dashboards and other Data Tracking Tools, Product and Services Catalog

LABOR CATEGORIES AND MINIMUM QUALIFICATIONS

LABOR CATEGORIES	
Labor Category	**Minimum Qualifications**
Program Director (Key Personnel)	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Ten or more years of progressive experience in managing significant projects and processes. • Must have the ability to manage and direct large and complex project tasks covering contract administration which may include acquisition planning, RFP/IFB preparation, market research, cost and price analysis, evaluation of performance, contract termination, and contract closeout. • Ability to research and define multiple project scopes, schedules, and targets. • Provides expert advice and guidance to agency senior level staff members. **Preferred Qualifications** • Project Management certification • Master's Degree or higher
Program Manager	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Eight or more years of providing management for multiple projects/tasks and ongoing operational efforts • Must have the ability to provide technical knowledge on the effectiveness and efficiency of government programs. • Able to apply advanced or specialized knowledge of the nature of agency programs and activities, agency policies and objectives • Possessing the analytical and evaluative methods and techniques for assessing program development and execution. **Preferred Qualifications** • Project Management certification • Master's Degree or higher

LABOR CATEGORIES	
Labor Category	**Minimum Qualifications**
Subject Matter Expert III	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Fifteen (15) or more years of progressive experience and possess extensive knowledge when advising on large and high complex project/programs. • Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs. • Able to provide highly technical and specialized guidance concerning solutions to complex problems. • Demonstrates executive decision-making skills and judgment. • Applies principles and methods of the subject matter to specialized solutions. **Preferred Qualifications** • Project Management certification • Master's Degree or higher
Subject Matter Expert II	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Eight (8) or more years of progressive experience and possess extensive knowledge when advising on large and high complex project/programs. • Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs. • Able to provide highly technical and specialized guidance concerning solutions to complex problems. • Demonstrates executive decision-making skills and judgment. • Applies principles and methods of the subject matter to specialized solutions. **Preferred Qualifications** • Project Management certification • Master's Degree or higher
Subject Matter Expert I	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Five (5) or more years of progressive experience • Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs. • Able to provide highly technical and specialized guidance concerning solutions to complex problems. • Applies principles and methods of the subject matter to specialized solutions. **Preferred Qualifications** • Project Management certification • Master's Degree or higher

LABOR CATEGORIES	
Labor Category	**Minimum Qualifications**
Acquisition Support Specialist III (Key Personnel)	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Eight (8) or more years of providing a broad range of complex acquisition management support services. • Must have the ability read and interpret each State's acquisition policy, regulations, and directives and apply those interpretations fully and legally to all activities described in the Statement of Work (SOW.) • Able to analyze cost and pricing data, assistance in proposal evaluations, and assistance in preparing contract negotiations. **Preferred Qualifications** • Certification from a nationally recognized organization such as NCMA, UPPCC or DAU. • Master's Degree or higher in Business Administration, Business Law, or Public Administration
Acquisition Support Specialist II	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Five (5) or more years of providing a broad range of complex acquisition management support services. • Must have the ability to read and interpret each State's acquisition policy, regulations, and directives and apply those interpretations fully and legally to all activities described in the Statement of Work (SOW.) • Able to analyze cost and pricing data, assistance in proposal evaluations, and assistance in preparing contract negotiations. **Preferred Qualifications** • Certification from a nationally recognized organization such as NCM, UPPCC or DAU. • Master's Degree or higher in Business Administration, Business Law, or Public Administration
Acquisition Support Specialist I	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Three (3) or more years of providing a broad range of complex acquisition management support services. • Must have the ability read and interpret each State's acquisition policy, regulations, and directives and apply those interpretations fully and legally to all activities described in the Statement of Work (SOW.) • Able to analyze cost and pricing data, assistance in proposal evaluations, and assistance in preparing contract negotiations. **Preferred Qualifications** • Certification from a nationally recognized organization such as NCMA, UPPCC or DAU. • Master's Degree or higher in Business Administration, Business Law, or Public Administration

LABOR CATEGORIES	
Labor Category	**Minimum Qualification(s)**
Analyst II	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Five (5) or more years of relevant experience in developing and applying analytic methodologies. • Ability to lead the application of analytic techniques and assist in defining the project objectives, methodologies, and principles. • Perform a wide variety of analytical tasks with the continuous improvement of processes, personnel, organization, system, or training. **Preferred Qualifications** • Business Data Analytics Certificate, Cost Estimator/Analyst Certification, CPA License • Master's Degree
Analyst I	**Must have at a minimum:** • Bachelor's Degree or higher from an accredited college or university in a related field. • Three (3) or more years of relevant experience in developing and applying analytic methodologies. • Ability to lead the application of analytic techniques and assist in defining the project objectives, methodologies, and principles. • Perform a wide variety of analytical tasks with the continuous improvement of processes, personnel, organization, system, or training. **Preferred Qualifications** • Business Data Analytics Certificate, Cost Estimator/Analyst Certification, CPA License

HOURLY PRICES PER LABOR CATEGORY

Prices per labor category are noted in the Contractors' information sheet below. Prices represent fully-burdened rates inclusive of all cost factors (e.g. direct labor, indirect labor, G&A, and profit), excluding travel. The prices are good for the base period of two years. If the state chooses to extend the contract for additional years, a price list change will reflect any price increases. Note: During evaluation, the team used a variety of price analysis techniques and procedures to determine price reasonableness. At a minimum, the Contractor shall honor prices noted for each labor category, on-site or off-site. Off-site is the Contractor's place of work. On-site is the government (any State or County) place of work.

Master Agreement No. 19-19-02

ADDRESS

Business Address:
ASI Government, LLC
1655 N. Fort Myer Drive, Suite 1000
Arlington, VA 22209

Remittance Address:
ASI Government, LLC
1655 N. Fort Myer Drive, Suite 1000
Arlington, VA 22209

CONTACT INFORMATION

Primary Contact: Mark Attwa *Phone:* (703) 253-6355

Email: mark.attwa@asigovt.com *Fax:* (703) 253-6301

Website: https://www.asigovernment.com/naspo-value-point-procurement-for-acquisition-services/

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$197.291	$185.45
Program Manager	$181.71	$170.81
Subject Matter Expert III	$191.65	$180.15
Subject Matter Expert II	$164.31	$154.45
Subject Matter Expert I	$147.88	$139.01
Acquisition Support Specialist III	$183.30	$172.30
Acquisition Support Specialist II	$164.31	$154.45
Acquisition Support Specialist I	$100.18	$94.17
Analyst II	$132.99	$125.01
Analyst I	$100.18	$94.17

Master Agreement No. 19-19-03

ADDRESS

Business Address:
Berry Dunn McNeil & Parker, LLC
2211 Congress Street
Portland, ME 04104-1100

Remittance Address:
Berry Dunn McNeil & Parker, LLC
PO Box 1100
Portland, ME 04104

CONTACT INFORMATION

Primary Contact: Charles K. Leadbetter
Phone: (207) 541-2200
Email: pqcv@berrydunn.com
Fax: (207) 541-2323
Website: https://www.berrydunn.com/

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$318.00	$318.00
Program Manager	$256.00	$256.00
Subject Matter Expert III	$293.00	$293.00
Subject Matter Expert II	$241.00	$241.00
Subject Matter Expert I	$194.00	$194.00
Acquisition Support Specialist III	$256.00	$256.00
Acquisition Support Specialist II	$194.00	$194.00
Acquisition Support Specialist I	$132.00	$132.00
Analyst II	$194.00	$194.00
Analyst I	$132.00	$132.00

Center for Applied Innovation

Make all things clear

Master Agreement No. 19-19-04

ADDRESS

Business Address:
Center for Applied Innovation, LLC
214 Terrebonne Road
Yorktown, VA 23692

Remittance Address:
Center for Applied Innovation, LLC
214 Terrebonne Road
Yorktown, VA 23692

CONTACT INFORMATION

Primary Contact: Robert Morris *Phone:* (757) 869-6770

Email: BobM@caihq.com *Fax:* (270) 477-7087

Website: Acquisition Support Services – CAI

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$213.467	$198.91
Program Manager	$204.50	$190.56
Subject Matter Expert III	$278.85	$259.85
Subject Matter Expert II	$204.50	$190.56
Subject Matter Expert I	$171.03	$159.36
Acquisition Support Specialist III	$193.34	$180.15
Acquisition Support Specialist II	$115.83	$107.93
Acquisition Support Specialist I	$81.15	$75.61
Analyst II	$92.88	$86.54
Analyst I	$70.83	$66.00

civicinitiatives

Government. Services. Transformed.

Master Agreement No. 19-19-05

ADDRESS

Business Address:
Civic Initiatives, LLC
823 Congress Avenue, #1433
Austin, TX 78767

Remittance Address:
Civic Initiatives, LLC
823 Congress Avenue, #1433
Austin, TX 78767

CONTACT INFORMATION

Primary Contact: Dustin Lanier, Principal

Phone: (512) 523-4834

Email: dlanier@civicinitiatives.com

Fax: (512) 351-4644

Website: www.civicinitiatives.com

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$223.69	$239.29
Program Manager	$176.87	$192.47
Subject Matter Expert III	$202.88	$218.48
Subject Matter Expert II	$176.87	$192.47
Subject Matter Expert I	$145.66	$161.26
Acquisition Support Specialist III	$176.87	$192.47
Acquisition Support Specialist II	$145.66	$161.26
Acquisition Support Specialist I	$109.24	$124.85
Analyst II	$124.85	$140.45
Analyst I	$98.84	$114.44

Master Agreement No. 19-19-06

ADDRESS

Business Address:
Gartner, Inc.
1201 Wilson Blvd., 17th Floor
Arlington, VA 22209

Remittance Address:
Gartner, Inc.
P. O. Box 911319
Dallas, TX 75391

CONTACT INFORMATION

Primary Contact: Christopher Ragan
Phone: (916) 420-1860
Email: chris.ragan@gartner.com
Fax: (866) 630-9110
Website: https://www.gartner.com/en/consul

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$457.78	$503.56
Program Manager	$353.48	$388.83
Subject Matter Expert III	$423.02	$465.32
Subject Matter Expert II	$353.48	$388.83
Subject Matter Expert I	$220.20	$242.22
Acquisition Support Specialist III	$423.02	$465.43
Acquisition Support Specialist II	$220.20	$242.22
Acquisition Support Specialist I	$185.43	$203.97
Analyst II	$185.43	$203.97
Analyst I	$127.48	$140.23

Master Agreement No. 19-19-07

ADDRESS

Business Address:
Ikaso Consulting, LLC
533 Airport Blvd.; Suite 400
Burlingame, CA 94010

Remittance Address:
Ikaso Consulting, LLC
533 Airport Blvd.; Suite 400
Burlingame, CA 94010

CONTACT INFORMATION

Primary Contact: Reiko Osaki, President and CEO *Phone:* (415) 734-6858

Email: rosaki@ikasoconsulting.com *Fax:* (415) 520-2662

Website: www.ikasoconsulting.com

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$202.87	$202.87
Program Manager	$202.87	$202.87
Subject Matter Expert III	$202.87	$202.87
Subject Matter Expert II	$202.87	$202.87
Subject Matter Expert I	$202.87	$202.87
Acquisition Support Specialist III	$202.87	$202.87
Acquisition Support Specialist II	$202.87	$202.87
Acquisition Support Specialist I	$202.87	$202.87
Analyst II	$202.87	$202.87
Analyst I	$202.87	$202.87

Master Agreement No. 19-19-08

ADDRESS

Business Address:
ITSC Secure Solutions, LLC
12801 Fair Lakes Pkwy, Ste. 150
Fairfax, VA 22033

Remittance Address:
ITSC Secure Solutions, LLC
12801 Fair Lakes Pkwy, Ste. 150
Fairfax, VA 22033

CONTACT INFORMATION

Primary Contact: Judy Haberman *Phone:* (978) 873-1393

Email: judy.haberman@itsc-ss.com *Fax:* (703) 991-1081

Website: *www.itsc-ss.com*

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$130.98	119.45
Program Manager	$111.55	$101.72
Subject Matter Expert III	$174.01	$158.69
Subject Matter Expert II	$156.17	$142.41
Subject Matter Expert I	$138.32	$126.14
Acquisition Support Specialist III	$92.34	$84.21
Acquisition Support Specialist II	$73.18	$66.73
Acquisition Support Specialist I	$58.00	$52.90
Analyst II	$98.16	$89.52
Analyst I	$84.78	$77.31

Master Agreement No. 19-19-09

ADDRESS

Business Address:
Mathtech, Inc.
2465 Kuser Road, Suite 200
Hamilton, NJ 08690

Remittance Address:
Mathtech, Inc.
2465 Kuser Road, Suite 200
Hamilton, NJ 08690

CONTACT INFORMATION

Primary Contact: Steven Young
Phone: (609) 689-8511
Email: SYoung@Mathtechinc.com
Fax: (609) 689-8505
Website: www.mathtechinc.com

StateTeam@Mathtechinc.com

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$182.07	$238.68
Program Manager	$166.46	$222.77
Subject Matter Expert III	$161.26	$217.46
Subject Matter Expert II	$140.45	$196.25
Subject Matter Expert I	$119.65	$175.03
Acquisition Support Specialist III	$161.26	$217.46
Acquisition Support Specialist II	$140.45	$196.25
Acquisition Support Specialist I	$119.65	$175.03
Analyst II	$114.44	$169.73
Analyst I	$104.04	$159.12

Master Agreement No. 19-19-10

ADDRESS

Business Address:
Monterey Consultants, Inc.
5335 Far Hills Avenue, Suite 311
Dayton, OH 45429

Remittance Address:
Monterey Consultants, Inc.
5335 Far Hills Avenue, Suite 311
Dayton, OH 45429

CONTACT INFORMATION

Primary Contact: Michael E. Knipper, PHD, President
Phone: (937) 436-4536
Email: Mike.knipper@mcix.com
Fax: (937) 436-5821
Alternate Contact: Tom Hoskins, Senior Consultant
Email: Tom.hoskins@mcix.com
Alternate Contact: *John Gerardo, Director, Business Development*
Email: *John.gerardo@mcix.com*
Alternate Contact: Ginger Horner, Business Development
Email: Ginger.horner@mcix.com
Website http://www.mcix.com

PRICING (Monterey Consultants, Inc.)

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$184.05	$182.20
Program Manager	$137.15	$135.75
Subject Matter Expert III	$186.00	$184.10
Subject Matter Expert II	$148.70	$147.20
Subject Matter Expert I	$105.45	$104.45
Acquisition Support Specialist III	$182.65	$180.80
Acquisition Support Specialist II	$130.60	$129.30
Acquisition Support Specialist I	$86.35	$85.45
Analyst II	$106.55	$105.45
Analyst I	$76.15	$75.35

PUBLIC KNOWLEDGE®

Master Agreement No. 19-19-12

ADDRESS

Business Address:
Public Knowledge, LLC
4720 Independence Street
Wheat Ridge, CO 80033

Remittance Address:
Public Knowledge, LLC
600 Airport Road
Lakewood, NJ 08701

CONTACT INFORMATION

Primary Contact: Stacey Obrecht
Phone: (307) 223-1461
Email: procurement@pubknow.com
1-800-776-4229
Website: www.pubknow.com/naspo

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$208.00	$213.00
Program Manager	$186.00	$191.00
Subject Matter Expert III	$208.00	$213.00
Subject Matter Expert II	$186.00	$196.00
Subject Matter Expert I	$171.00	$181.00
Acquisition Support Specialist III	$186.00	$196.00
Acquisition Support Specialist II	$171.00	$181.00
Acquisition Support Specialist I	$156.00	$166.00
Analyst II	$171.00	$181.00
Analyst I	$156.00	$166.00

Master Agreement No. 19-19-14

ADDRESS

Business Address:
Business Management Research Associate, Inc.
9817 Godwin Drive, Suite 202
Manassas, VA 20110

Remittance Address:
Business Management Research Associate, Inc.
9817 Godwin Drive, Suite 202
Manassas, VA 20110

CONTACT INFORMATION

Primary Contact: Hunter Robinson
Phone: (703) 691-0868
Email: BusinessDevelopment@bmra.com
Cell: (540) 359-9947

Email: info@bmra.com

Website: *www.bmra.com*

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$151.03	$137.43
Program Manager	$138.07	$125.65
Subject Matter Expert III	$211.43	$192.41
Subject Matter Expert II	$143.091	$130.96
Subject Matter Expert I	$122.51	$111.49
Acquisition Support Specialist III	$103.07	$93.79
Acquisition Support Specialist II	$99.57	$90.61
Acquisition Support Specialist I	$88.93	$80.93
Analyst II	$99.57	$90.61
Analyst I	$88.93	$80.93

trust
consulting services

Master Agreement No. 19-19-16

ADDRESS

Business Address:
Trust Consulting Services, Inc.
2020 Pennsylvania Ave. NW, Suite 327
Washington, D.C. 20006

Remittance Address:
Trust Consulting Services, Inc.
2020 Pennsylvania Ave. NW, Suite 327
Washington, D.C. 20006

CONTACT INFORMATION

Primary Contact: James Radford
Phone: (202) 888-4567
Email: jamesr@tcsservices.net
(202) 478-1841
Website: *www.tcsservices.net*

PRICING

Labor Category	Fully Burdened Hourly Rate, Off-Site	Fully Burdened Hourly Rate, On-Site
Program Director	$105.04	$91.34
Program Manager	$104.92	$91.24
Subject Matter Expert III	$103.13	$89.68
Subject Matter Expert II	$98.64	$85.78
Subject Matter Expert I	$94.16	$81.88
Acquisition Support Specialist III	$85.19	$74.08
Acquisition Support Specialist II	$80.71	$70.18
Acquisition Support Specialist I	$76.22	$66.28
Analyst II	$74.43	$64.72
Analyst I	$69.95	$60.82