

Federal Supply Schedule Industrial Group OOCORP

Professional Service Schedule (PSS) Catalog



Contract Number: 47QRAA18D0015

Contract Period: 11/1/17 – 10/31/22

Contractor:

Ikaso Consulting, LLC.

1001 Bayhill Dr., Suite 200

San Bruno, CA 94066

www.ikasoconsulting.com

Contractor Contact:

Reiko Osaki, President and CEO

Phone: 415-734-6858

Fax: 415-520-2662

Email: rosaki@ikasoconsulting.com

1.0 Customer Information

Section	Information Request	Ikaso Response
1.1.1a	Special Item Numbers (SIN)	<ul style="list-style-type: none"> • 874 1 – Integrated Consulting Services • 874 6 – Acquisition Management Support • 874 7 – Integrated Business Program Support Services • 00CORP-500 – Order-Level Materials • Ikaso has also been awarded the Disaster Recovery Purchasing Program for the following SINs: 874-1RC, 874-6RC, 874-7RC, 00CORP-500RC
1.1.1b	Lowest Priced Model	N/A
1.1.1c	Labor Rates	See Section 5.2 Labor Rates
1.1.2	Maximum Order	\$1,000,000
1.1.3	Minimum Order	\$100
1.1.4	Geographic Coverage	Domestic
1.1.5	Point(s) of Production	N/A
1.1.6	Discount from list prices or statement of net price	Prices are net prices and include all discounts and fees
1.1.7	Quantity Discounts	None
1.1.8	Prompt Payment Terms	0%, Net 30 days
1.1.9	Government Purchase Cards	Accepted below and above the micro-purchase threshold
1.1.10	Foreign Items	N/A
1.1.11a	Time of Delivery	Determined by the Ordering Agency
1.1.11b	Expedited Delivery	N/A
1.1.11c	Overnight Delivery	N/A
1.1.11d	Urgent Requirements	N/A
1.1.12	F.O.B. Points	Destination
1.1.13a	Ordering Address	Reiko Osaki President and CEO Ikaso Consulting LLC 1001 Bayhill Drive, Suite 200 San Bruno, CA 94066
1.1.13b	Ordering Procedures	Orders are placed directly with the individual listed above
1.1.14	Payment Address	Ikaso Consulting LLC 1001 Bayhill Drive, Suite 200 San Bruno, CA 94066
1.1.15	Warranty Provision	N/A
1.1.16	Export Packing Charges	N/A
1.1.17	Terms and Conditions - Government Purchase Cards	N/A

Section	Information Request	Ikaso Response
1.1.18	Terms and Conditions – Rental, Maintenance, and Repair Terms	N/A
1.1.19	Terms and Conditions – Installation	N/A
1.1.20	Terms and Conditions – Repair Parts	N/A
1.1.20a	Terms and Conditions – Other Services	N/A
1.1.21	Service Distribution Points	N/A
1.1.22	Participating Dealers	N/A
1.1.23	Preventative Maintenance	N/A
1.1.24a	Special Attributes	N/A
1.1.24b	Section 508 Compliance	N/A
1.1.25	Data Universal Number System (DUNS) Number	022769233
1.1.26	Notification regarding registration in Central Contractor Registration (CCR) database	Ikaso Consulting LLC is registered in the System for Award Management (SAM) Database

2.0 Introduction

Ikaso Consulting, LLC is a leader in public-sector acquisition strategy and execution, contract management, and organizational assessments. Since Ikaso’s founding in 2008, our team has worked closely with government executives (e.g., Commissioners of Departments of Administration, Agency Secretaries, and Chief Procurement Officers) as well as administrators of large, complex programs such as Medicaid and human services programs to assist public organizations in better serving their constituents.

Ikaso is differentiated by our breadth of government experience, strong commitment to quality and client satisfaction, and flexibility to adapt to client and stakeholder needs. We have a proven track record of successful projects, exceptionally positive client references, and significant value created for each of our clients.

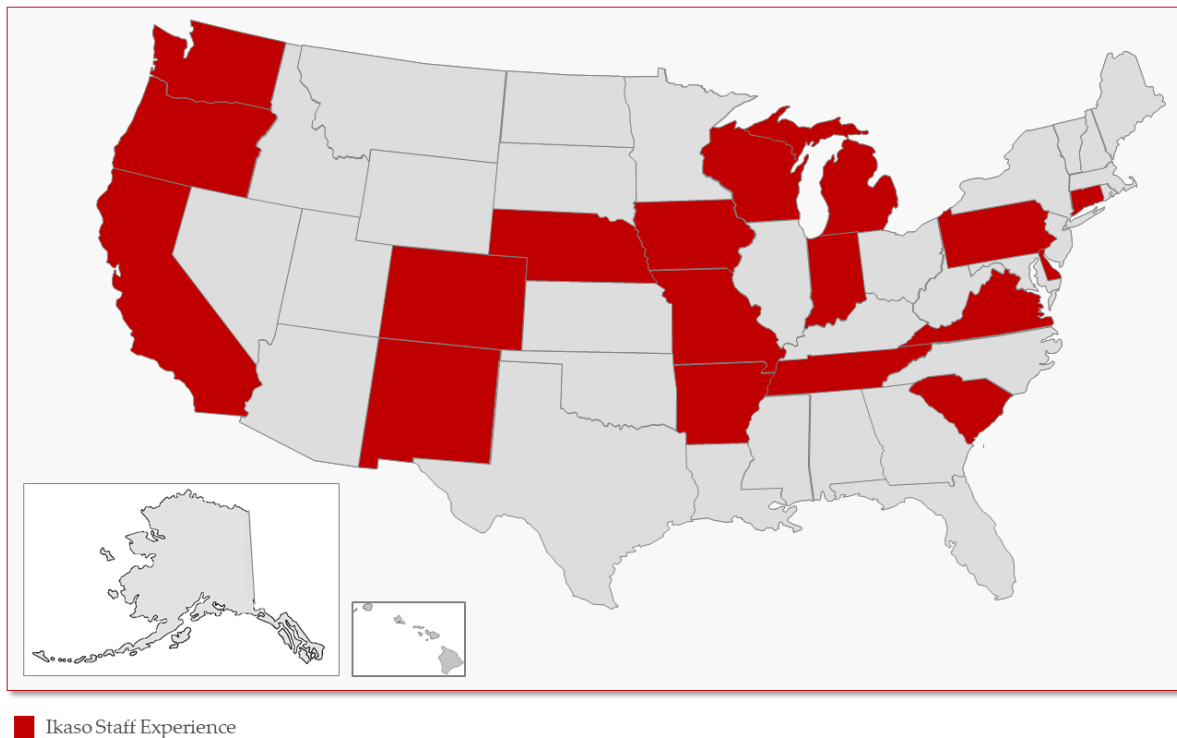
Ikaso has engaged in many different aspects of government consulting and has developed expertise in the following:

- **Acquisition Strategy and Support:** End-to-end acquisition execution, strategic sourcing execution, contract analysis and benchmarking, Request for Proposal/Qualification (RFP/RFQ) development, pricing strategy, negotiations strategy, and protest mitigation strategies
- **Contract Management Support:** Contract management process analysis, contract monitoring, savings validation program and tools
- **Program Design:** Program transformation/reorganization, business process assessment, procurement law/rule/policy/process reform, spend analysis and reporting
- **Organization Assessment:** Workload analysis, acquisition organization assessment, business process assessment, acquisition law/rule/policy/process review and promulgation, contract portfolio review and analysis, spend analysis and reporting

- **Project/Vendor Management:** Acquisition project management, vendor management

2.1 Ikaso at a Glance

- Ikaso has exclusively served public-sector clients for 10 years.
- Our seasoned team has over 150 years of combined experience with 18 state governments. Our coverage spans the entire nation, from the East Coast to Hawaii.
- We have created over \$740 million in total contract-length savings for our clients.
- Our team has specific expertise in acquisition support, contract management, vendor management, acquisition program design, and organizational analysis. We also have domain expertise in health and human services programs and administrative services.
- Ikaso is an independent minority and woman-owned business.
- A map showing Ikaso team member experience across the nation is provided below:



Ikaso’s independence prevents conflicts of interest. Ikaso’s status as an independent (minority and woman owned) company with a singular focus on acquisition consulting averts conflicts of interest during our execution of all client acquisition projects. There are no other business areas at Ikaso that might bid on other types of contracts and, thus, Ikaso’s potential conflicts are completely minimized.

2.2 Ikaso's Services

Ikaso delivers the visibility, control, and insights that public sector executives need to manage and optimize their organizations' operations. The table below provides an overview of our suite of services, which help our clients design and implement organization and procedural changes that improve performance, create savings and efficiencies, and deliver on the mission statement of the client.

Category	Sample Ikaso Services
Program Design	<ul style="list-style-type: none"> • Program transformation/reorganization • Business process assessment • Acquisition law, rule, policy, and process reform • Spend analysis and reporting
Organizational Analysis	<ul style="list-style-type: none"> • Organization strategy and design • Workload analysis and optimization • Staffing/human resources practices support
Acquisition Strategy and Support	<ul style="list-style-type: none"> • End-to-end strategic sourcing execution • Contract analysis and benchmarking • Request for Proposal (RFP) development • Negotiations strategy • Protest mitigation strategies • Proposal development
Contract Management Support	<ul style="list-style-type: none"> • Contract management process analysis • Contract monitoring • Savings validation program and tools
Project Management	<ul style="list-style-type: none"> • Marketing materials support • Project management • Vendor management • Grant funding monitoring tools and support

2.3 Domain Expertise

Ikaso’s professionals bring with them backgrounds from management consultancies, public sector acquisition departments, human resources organizations, and healthcare and human services organizations. This provides us with deep domain knowledge in healthcare, human services, and administrative program areas.

For health care and human services, we are experienced in three main areas: program services, IT systems, and operations. Please see the table below for a sample of past acquisitions we supported in this domain.

Healthcare and Social Services	
Program Services	<ul style="list-style-type: none"> • Care management • Crisis management • Durable medical equipment • Enrollment broker • Food services (state-operated facilities) • Incontinence supplies • Managed care organizations (MCOs) • Nursing facilities • Pharmacy benefits management (PBM) • Prior authorizations
IT Systems	<ul style="list-style-type: none"> • Child care information systems • Enterprise data warehouse • Medicaid Management Information Systems (MMIS) • Eligibility determination systems
Operations	<ul style="list-style-type: none"> • 1915(c) Home and Community Based Services (HCBS) waivers support • Actuarial services • Clinical services review • Cost allocation • EBT (SNAP and TANF) • Fiscal agent • Fraud and abuse detection • Health insurance exchanges • Independent verification and validation (IV&V) • Long term care audit • Quality improvement & assurance • Rate setting

Additionally, we have experience working directly with administrative services divisions in the capacities listed below.

Administrative Services			
Operations	<ul style="list-style-type: none"> • Agency-specific or enterprise-wide strategic sourcing of products and services • Coordinated acquisition initiatives across state and local governments (e.g., K-12 entities, cities and towns, higher education entities) • Contract monitoring and savings validation • E-catalog implementation and optimization support • Minority/women/veteran-owned business program and small business program support • Acquisition agency reform • Strategic Sourcing. Examples: <table border="0" style="margin-left: 20px;"> <tr> <td style="vertical-align: top;"> <ul style="list-style-type: none"> - Advertising and Public Relations - Background Checking Services - Copy Paper - E-books - Educational testing - Food/Cafeteria Services - Furniture - Hearing Aids - Incontinence Supplies - Inmate Medical Services - Janitorial Supplies - Mail Room Equipment - Maintenance, Repair, and Operations </td> <td style="vertical-align: top; border-left: 1px solid #ccc; padding-left: 10px;"> <ul style="list-style-type: none"> - Office Equipment - Office Supplies - Paint - Pest Control - Purchasing and Stored Value Cards - PC Hardware - Printing and Mailing Services - Radio Equipment - Road Salt - Software - Vehicles - Vehicles Maintenance and Supplies - Temporary Staffing </td> </tr> </table> 	<ul style="list-style-type: none"> - Advertising and Public Relations - Background Checking Services - Copy Paper - E-books - Educational testing - Food/Cafeteria Services - Furniture - Hearing Aids - Incontinence Supplies - Inmate Medical Services - Janitorial Supplies - Mail Room Equipment - Maintenance, Repair, and Operations 	<ul style="list-style-type: none"> - Office Equipment - Office Supplies - Paint - Pest Control - Purchasing and Stored Value Cards - PC Hardware - Printing and Mailing Services - Radio Equipment - Road Salt - Software - Vehicles - Vehicles Maintenance and Supplies - Temporary Staffing
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3.0 Special Item Number (SIN) Experience

3.1 SIN 874-1: Integrated Consulting Services

GSA Description: Contractors shall provide expert advice and assistance in support of an agency's mission-oriented business functions. Services covered by this SIN include: Management or strategy consulting, including research, evaluations, studies, analyses, scenarios/simulations, reports, business policy and regulation development assistance, strategy formulation, and expert witness services:

- Facilitation and related decision support services
- Survey services, using a variety of methodologies, including survey planning, design, and development; survey administration; data validation and analysis; reporting, and stakeholder benefits
- Advisory and assistance services in accordance with FAR 37.203

Ikaso has provided a broad range of integrated consulting services to our clients. Our organizational flexibility and breadth of knowledge allow us to become involved in addressing our clients' diverse needs and to deliver tangible results.

For one government client, Ikaso was selected to assist with a legislatively-mandated consolidation of the client's procurement of goods and services acquisition teams. As part of this project, Ikaso recommended changes to procurement statutes, rules, policies, and procedures and proposed a new procurement organization structure, complete with job descriptions, duties and functions, and an overall transition plan for the client to aid in the implementation of best practices.

"I have worked closely with the Ikaso team on a variety of projects and have found the team highly strategic and analytical, bringing great value to the initiatives they lead. I look to the Ikaso team as trusted advisors and skilled tacticians, playing both roles with exceptional communications skills, great team work, and strong abilities that consistently exceed our expectations."

- *Commissioner, Department of Administration, State Government Client*

At the request of the client, we were asked to further engage in the follow-up development of a customized training program for their procurement staff and in procuring and implementing an e-procurement software solution.

Ikaso supported another state client in the expansion of their Medicaid program for individuals dually eligible for Medicare and Medicaid. Specifically, Ikaso's responsibilities included the following:

- Assistance in various member/provider/health plan outreach efforts, including planning, data analyses, materials creation and review
- Initial review of all plan-submitted marketing material against Centers for Medicare & Medicaid (CMS) guidance
- Coordination of state team's review of all materials
- Consulting services related to the client' waiver programs
- Development of health plan and provider training materials
- Assistance with operational dashboards and documentation

3.2 SIN 874-6: Acquisition Management Support

GSA Description: Contractors shall provide professional support services to agencies in conducting federal acquisition management activities. Services covered by this SIN are: acquisition planning assistance, including market research and recommending procurement strategy; acquisition document development, including cost/price estimates, quality assurance surveillance plans, statements of work, synopses, solicitations, price negotiation memoranda, etc.; expert assistance in supporting proposal evaluations, including price/cost analysis or technical proposal analysis; contract administration support services, including assistance with reviewing contractor performance, developing contract modifications, and investigating reports of contract discrepancies; contract close-out assistance; Competitive Sourcing support, including OMB Circular A-76 studies, strategic sourcing studies, privatization studies, public-private partnerships, and Federal Activities Inventory Reform (FAIR) Act studies.

Ikaso can provide full-spectrum acquisition support, from strategic planning of acquisitions to contract negotiation and performance evaluation. Our expertise in public sector processes, and our working relationships with both program staff and acquisition staff, allow us to coordinate critical organization-wide projects and support priority initiatives.

For one state government client, Ikaso provides support for a coordinated strategic sourcing program that includes participation from local governments and schools. Ikaso assists with workstream prioritization, facilitating oversight meetings, data collection support and analysis, and staff training. Additionally, Ikaso supports the client with the preparation and execution of RFPs by consulting on acquisition strategy, developing the RFP documents, drafting answers to vendor questions, supporting evaluations, and assisting with negotiations and contract drafting.

Ikaso can assist clients with any aspect of post-award contract management. This includes providing quality assurance for a vendor's deliverables, managing vendors, measuring vendor performance, and helping with contract amendments and renegotiations. We are able to develop tools to help the client track and report on such post award contract management activities and findings to facilitate executive decisions on vendors and contracts.



“It is critical to ensure project teams include all the right people from my agency and other government departments. When Ikaso is involved, everyone speaks the same language and pursues a common goal of negotiating the best contracts with the highest service levels at the lowest reasonable price. Putting the best programs in place while responsibly stewarding taxpayer dollars happens with Ikaso.”

- *Secretary, Health and Human Services Department, State Government Client*

For projects that require federal review and approval, Ikaso can provide support to develop materials requested by the federal entities while also monitoring high-level “global” changes such as new laws, rules, and regulations that might further impact any processes. For example, when a client decided to implement an enterprise data warehouse, Ikaso led the effort to answer any questions from the Centers for Medicare & Medicaid (CMS) and the Food and Nutrition Service (FNS) during the RFP drafting and helped provide information to update the federal entities during the acquisition lifecycle.

3.3 SIN 874-7: Integrated Business Program Support Services

GSA Description: Contractors shall provide services to assist agencies in managing their mission-oriented business projects or programs and achieving mission performance goals. Services covered by this SIN include:

- All phases of program or project management, from planning to closeout.
- Operational/administrative business support services in order to carry out program objectives.

Ikaso offers a range of support services to aid public-sector entities as they adapt to shifting program goals, stakeholder needs, and state and federal requirements. Our long-term partnerships with clients have allowed us to assist in managing projects and programs as they develop over time, through new administrations and changing priorities.

One state’s Medicaid enterprise partnered with Ikaso to provide strategy and project support for the program’s mission critical, high-visibility transformation to statewide managed care. Ikaso assisted the client agency with its transition from a Medicaid fee-for-service model to managed care by supporting existing contract evaluation and re-alignment, end-to-end acquisition support for managed care organizations, and subsequent contract monitoring functions.

“Ikaso consultants are exceptional in their ability to facilitate key projects statewide and provide visibility and insight into critical issues that contribute to project success. Thanks to their efforts, we have experienced strong results both in terms of achieving cost savings and avoiding vendor complaints and protests.”

- *Commissioner, Department of Administration, State Government Client*

Additionally, Ikaso has been engaged on multiple business process studies, which have included such responsibilities as workload distribution assessments, interviews with staff and stakeholders, data analyses, and recommendation and report writing for client use.

4.0 Ikaso's Approach

We will tailor our work to each client's specific needs. For each client, we strive to understand and embrace their unique circumstances and requirements. Our first order of business is to become familiar with their specific environment, including priorities, needs, statutes, rules, and policies. This helps to ensure our strategy, findings, deliverables, and recommendations address the very specific needs of the client. On every project, we collaborate with the client to define project goals and what constitutes project success, along with performance measures, to ensure that our deliverables are of the highest quality and relevancy.

The Ikaso team prioritizes performance and accountability. Because Ikaso only serves public sector clients, we understand the need for transparency, civic engagement, and accountability in our projects. We ensure our work product can withstand public scrutiny and that we take clear steps to help the client mitigate protest and other forms of risk.

We integrate extensive quality management processes in all our projects. The Ikaso team delivers the highest quality work products with sustainable long-term results by utilizing an established end-to-end quality management approach. While we rely on the successes of our past engagements to offer frames of reference for our projects, we never assume that what works for one client will work for another. The responsible "owner" of a deliverable works collaboratively with the project team to leverage their experience and expertise. All team members are actively engaged throughout the process in identifying risks/issues, which we discuss in project meetings along with mitigation strategies and solutions. If an issue cannot be solved initially within the project team, the issue is escalated to senior Ikaso subject matter experts, who identify solutions, additional resources, or analysis. ..Once an initial deliverable draft is complete, it is subjected to a peer review. We have found that review from an experienced Ikaso team member who has not been involved on the project provides a beneficial "external" perspective of our products prior to client review.

Acquisition reform projects are based in comprehensive review. We have typically found that in order to effectively identify and eventually address and implement acquisition improvements, we must study several areas of the organization/program in particular, including its policies, business practices and processes, organizational structure, allocation of staff to specific functions, staff skills along with training offered, and the use of technology solutions. Our approach is further tailored to account for the complex interplay, not just among client departments, but between state/local and federal stakeholders, which can include funding rules, policies, review and approval processes, and ultimately operational guidelines.

We address client goals from inception to implementation. Unlike other consulting firms, we are built on the core idea that if a recommendation cannot be implemented and enable lasting,

sustainable results, our work is incomplete. Therefore, our approach incorporates a strong emphasis on planning and supporting implementation, acting as a lead or support as directed by our clients. Dedicating time to considering the goals of each stage of the acquisition lifecycle, including measurement of performance and outcomes, is an important factor for contract success. Our clients can have confidence that our full acquisition lifecycle approach will enhance accountability, improve effectiveness and performance, shift the balance of power to the client in client-vendor relationships, and decrease financial risks.

5.0 Labor

5.1 Labor Categories

DIRECTOR

A Director is responsible for overall successful project delivery as well as relationship management with client leadership. He/she provides subject matter expertise (particularly with respect to key issues, political sensitivities, and high-risk areas), draws on extensive experience to assist with recommendation development and prioritization, supports external and internal stakeholder engagement, and leads strategic meetings with the client executive team. He/she works with client leaders to set strategic direction for project, define expectations, and manage scope changes.

MANAGER

A Manager is a project leader who serves as the day-to-day contact for the client. He/she creates and manages the overall project schedule and oversees the project team and project delivery. A Manager provides subject matter expertise for work streams; drives project execution strategy; conducts high level analysis/validation of team findings and recommendations; reviews all deliverables prior to submission to the client; and identifies project issues, risks, and risk mitigation strategies for clients.

ASSOCIATE

An Associate is primarily responsible for developing analytical models, conducting client team interviews, drafting documents, managing work plans and deadlines, approaching challenges from multiple angles to find unique solutions, developing recommendations, and implementing solutions under oversight of a Senior Associate, Manager and/or Director. They may also provide subject matter expertise on specific project work streams.

ANALYST

An Analyst is primarily responsible for data gathering, conducting research and benchmarking, executing analytical models, cleansing and analyzing data, and preparing documents.

5.2 Labor Rates

Ikaso's Year 1 base rate is \$174.00 exclusive of the Industrial Funding Fee (IFF), and \$175.31 inclusive of the IFF, across all labor categories. The table below provides Ikaso's hourly rates per labor category, inclusive of IFF, for each contract year.

Category	Year 1 (11/1/17 – 10/31/18)	Year 2 (11/1/18 – 10/31/19)	Year 3 (11/1/19 – 10/31/20)	Year 4 (11/1/20 – 10/31/21)	Year 5 (11/1/21 – 10/31/22)
Director	\$175.31	\$179.17	\$183.11	\$187.14	\$191.26
Manager	\$175.31	\$179.17	\$183.11	\$187.14	\$191.26
Associate	\$175.31	\$179.17	\$183.11	\$187.14	\$191.26
Analyst	\$175.31	\$179.17	\$183.11	\$187.14	\$191.26

Escalation Rate: 2.2 percent fixed annual escalation rate based on EPA clause I-FSS969 (b)(1)