GENERAL SERVICES ADMINISTRATION

Federal Supply Service
Authorized Federal Supply Schedule Price List

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through GSA Advantage™, a menu-driven database system. The INTERNET address for GSA Advantage™ is: http://www.GSAAdvantage.gov.

Multiple Award Schedule
Federal Supply Group: Professional Services

Contract Number: 47QRAA18D006Z

For more information on ordering from Federal Supply Schedules, go to the GSA Schedules page at www.gsa.gov

Contract Period: March 28, 2018 through March 27, 2023
Pricelist Current through: Mod #PS-0018 – Effective on June 9, 2022

Contractor: BERKELEY RESEARCH GROUP LLC
2200 Powell Street, Suite 1200
Emeryville, CA 94608-1833

Business Size: Large Business

Contract Administration: Eric Miller
Telephone: 202-480-2700
FAX Number: 202-559-2173
Web Site: www.thinkbrg.com
E-mail: emiller@thinkbrg.com

Berkeley Research Group offers the highest level professional experience and competence in construction claims and disputes, including technical expertise in engineering, architecture, construction management, public contracting, specifications and technical document development, schedule development and delay analysis, cost analysis, negotiations, and expert witness testimony. Our multidisciplinary team has a strong foundation in project management, scheduling, and accounting combined with deep industry and government contracts experience. BRG’s team also has extensive practical design and construction experience (i.e., design, scheduling, estimating, cost accounting and construction management.)

Our experts are experienced in government contract disputes involving construction projects and include Professional Engineers, Project Management Professionals, Registered Architects, AACE Certified Planning & Scheduling Professionals, Certified Public Accountants, Certified Fraud Examiners, forensic accountants, and industry leaders.
CUSTOMER INFORMATION:

1a. Awarded Special Item Numbers:

<table>
<thead>
<tr>
<th>SIN</th>
<th>Recovery</th>
<th>SIN Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>541330ENG</td>
<td>541330ENGRC</td>
<td>Engineering Services</td>
</tr>
<tr>
<td>541611</td>
<td>541611RC</td>
<td>Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services</td>
</tr>
<tr>
<td>OLM</td>
<td>OLMRC</td>
<td>Order Level Materials</td>
</tr>
</tbody>
</table>

1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract. This price is the Government price based on a unit of one, exclusive of any quantity/dollar volume, prompt payment, or any other concession affecting price. Those contracts that have unit prices based on the geographic location of the customer, should show the range of the lowest price, and cite the areas to which the prices apply. N/A – Contractor is not offering products.

1c. If the Contractor is proposing hourly rates a description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform services shall be provided. If hourly rates are not applicable, indicate “Not applicable” for this item. Labor Category Descriptions begin on Page 5.

2. Maximum Order: $1,000,000 for SINs 541330ENG and 541611, and $250,000 for SIN OLM

3. Minimum Order: $100

4. Geographic Coverage: Worldwide

5. Points of production: 2200 Powell Street, Suite 1200, Emeryville, CA 94608-1833; 1800 M Street NW, Second Floor, Washington, DC 20036; and 3350 Riverwood Parkway, Suite 1900, Atlanta, GA 30339

6. Discount from list prices or statement of net price: Government net prices (discounts already deducted) are found on Page 4.

7. Quantity discounts: Yes

<table>
<thead>
<tr>
<th>Tier</th>
<th>Threshold Amount</th>
<th>Additional Discount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$1,000,000 and above</td>
<td>2%</td>
</tr>
</tbody>
</table>

8. Prompt payment terms: Net 30 Days. (Information for Ordering Offices: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.)

9. Foreign items: None

10a. Time of Delivery (Contractor insert number of days): Specified on the Task Order

10b. Expedited Delivery. The Contractor will insert the sentence “Items available for expedited delivery are noted in this price list.” under this heading. The Contractor may use a symbol of its choosing to highlight items in its price list that have expedited delivery: Contact Contractor
10c. Overnight and 2-day delivery. The Contractor will indicate whether overnight and 2-day delivery are available. Also, the Contractor will indicate that the schedule customer may contact the Contractor for rates for overnight and 2-day delivery: Contact Contractor

10d. Urgent Requirements. The Contractor will note in its price list the “Urgent Requirements” clause of its contract and advise agencies that they can also contact the Contractor’s representative to effect a faster delivery: Contact Contractor

11. F.O.B Point: N/A – Contractor is only offering services.

12a. Ordering Address: Berkeley Research Group, LLC, 1800 M Street NW, Second Floor, Washington, DC 20036

12b. Ordering procedures: For supplies and services, the ordering procedures and information on Blanket Purchase Agreements (BPA’s) are found in Federal Acquisition Regulations (FAR) 8.405-3.

13. Payment address: Berkeley Research Group, LLC, 2200 Powell Street, Suite 1200, Emeryville, CA 94608-1833

14. Warranty provision: N/A – Contractor is only offering services.

15. Export Packing Charges: N/A

16. Terms and conditions of rental, maintenance, and repair: N/A

17. Terms and conditions of installation: N/A

18a. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices: N/A

18b. Terms and conditions for any other services: N/A

19. List of service and distribution points: N/A

20. List of participating dealers: None

21. Preventive maintenance: N/A

22a. Special attributes, such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants): N/A

22b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contractor’s website or other location.) The EIT standards can be found at: www.Section508.gov, N/A

23. Unique Entity Identifier (UEI) number: JX7LMU1LKEG6

24. Notification regarding registration in the System for Award Management (SAM) database: Registered under CAGE Code 67NF2.
Final GSA Pricing

<table>
<thead>
<tr>
<th>SINs</th>
<th>Awarded Labor Category</th>
<th>Site</th>
<th>Awarded Price incl IFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>541330ENG/541330ENGRC and 541611/541611RC</td>
<td>Managing Director</td>
<td>Both</td>
<td>$424.35</td>
</tr>
<tr>
<td>541330ENG/541330ENGRC and 541611/541611RC</td>
<td>Director</td>
<td>Both</td>
<td>$399.05</td>
</tr>
<tr>
<td>541330ENG/541330ENGRC and 541611/541611RC</td>
<td>Managing Consultant</td>
<td>Both</td>
<td>$294.81</td>
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<tr>
<td>541330ENG/541330ENGRC and 541611/541611RC</td>
<td>Consultant</td>
<td>Both</td>
<td>$264.97</td>
</tr>
<tr>
<td>541330ENG/541330ENGRC and 541611/541611RC</td>
<td>Senior Associate</td>
<td>Both</td>
<td>$229.72</td>
</tr>
<tr>
<td>541330ENG/541330ENGRC and 541611/541611RC</td>
<td>Associate</td>
<td>Both</td>
<td>$202.42</td>
</tr>
<tr>
<td>541330ENG/541330ENGRC and 541611/541611RC</td>
<td>Administrative Assistant**</td>
<td>Both</td>
<td>$112.85</td>
</tr>
<tr>
<td>541611/541611RC</td>
<td>Financial Services Managing Director</td>
<td>Both</td>
<td>$566.75</td>
</tr>
<tr>
<td>541611/541611RC</td>
<td>Financial Services Director</td>
<td>Both</td>
<td>$471.54</td>
</tr>
<tr>
<td>541611/541611RC</td>
<td>Financial Services Associate Director</td>
<td>Both</td>
<td>$403.02</td>
</tr>
<tr>
<td>541611/541611RC</td>
<td>Financial Services Senior Managing Consultant</td>
<td>Both</td>
<td>$363.98</td>
</tr>
<tr>
<td>541611/541611RC</td>
<td>Financial Services Managing Consultant</td>
<td>Both</td>
<td>$306.80</td>
</tr>
<tr>
<td>541611/541611RC</td>
<td>Financial Services Consultant</td>
<td>Both</td>
<td>$272.04</td>
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<tr>
<td>541611/541611RC</td>
<td>Financial Services Senior Associate</td>
<td>Both</td>
<td>$226.70</td>
</tr>
<tr>
<td>541611/541611RC</td>
<td>Financial Services Associate</td>
<td>Both</td>
<td>$181.36</td>
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</tbody>
</table>

Service Contract Labor Standards (SCLS) Matrix

<table>
<thead>
<tr>
<th>SCLS Eligible Labor Category</th>
<th>SCLS Equivalent Code Title</th>
<th>Wage Determination No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Assistant</td>
<td>01111 - General Clerk 1</td>
<td>2015-4281</td>
</tr>
</tbody>
</table>

The Service Contract Labor Standards, formerly the Service Contract Act (SCA), apply to this contract and this contract includes SCLS applicable labor categories. Labor categories and fixed price services marked as Non-Exempt/SCLS in this pricelist by a ** are based on the U.S. Department of Labor Wage Determination Numbers identified in the SCLS/SCA matrix above. The prices awarded are in line with the geographic scope of the contract (i.e., nationwide).
Labor Category Descriptions

1. MANAGING DIRECTOR: (SINs 541330ENG and 541611)

Minimum/General Experience:

A BRG Managing Director has a minimum of 18 years of construction, engineering and/or consulting experience.

Functional Responsibility:

A Managing Director has the primary responsibility to manage BRG’s client relationships and to administer the services provided to them. They provide the highest level of expert client service experience and expertise. Managing Directors participate in program and project management, staff development, technical effectiveness, marketing and sales. Managing Directors have final authority in the conduct of engagements and full responsibility for the work performed, including overall project management, quality control, and final review of any work product.

Among the tasks that a Managing Director would perform for clients, are the following:

- Primary authorship of expert reports and analyses provided to the client on the subjects described in the following bullet points as well as preparation and delivery of presentations and expert testimony, if required.
- Analysis of project schedules, daily reports, photographs and other documents to determine the existence of any project delays, the extent of such delays, the party or parties responsible for causing the delays, and whether the delays are or are not compensable and/or excusable.
- Analysis of labor and productivity records to determine a contractor or a subcontractor’s productivity to determine whether any actions of the government contributed to or caused any deviations from planned productivity.
- Review of change orders, particularly those that are in dispute or still unresolved, to determine the reasonableness of the amount charged, whether there is proper support for the change, and whether the issue causing the change is, in fact, a change that would entitle the contractor to additional costs or whether it is part of the original contract scope.
- Engineering and/or architectural analyses of failure of an installation or product, analyses of the quality and constructability of elements of the project’s design documents.
- Accounting analysis of the costs of the project, whether the costs were properly supported, whether there is causation between the alleged events and the cost records utilized to support the claimed amount, and other cost accounting issues related to the costs of construction.

Minimum Education: Bachelor’s Degree

2. DIRECTOR: (SINs 541330ENG and 541611)

Minimum General Experience:

A BRG Director has a minimum of 15 years of construction, engineering and/or consulting experience.

Functional Responsibility:

Directors manage BRG’s client relationships and administer the services provided to them. Directors participate in engagement management, staff development, technical effectiveness, marketing and sales. Directors have primary authority in the conduct of engagements and full responsibility for the work performed, including overall project management, quality control, and final review of any work product.

Among the tasks that a Director would perform for clients where the Director has primary responsibility, are the following:
Primary authorship of expert reports and analyses provided to the client on the subjects described in the following bullet points as well as preparation and delivery of presentations and assistance to the expert testimony, if required.

Analysis of project schedules, daily reports, photographs and other documents to determine the existence of any project delays, the extent of such delays, the party or parties responsible for causing the delays, and whether the delays are or are not compensable and/or excusable.

Analysis of labor and productivity records to determine whether any actions of the government contributed to or caused any deviations from planned productivity.

Review of change orders, particularly those that are in dispute or still unresolved, to determine whether any actions of the government contributed to or caused any deviations from planned productivity.

Engineering and/or architectural analyses of failure of an installation or product, analyses of the quality and constructability of elements of the project’s design documents

Accounting analysis of the costs of the project, whether the costs were properly supported, whether there is causation between the alleged events and the cost records utilized to support the claimed amount, and other cost accounting issues related to the costs of construction.

Minimum Education: Bachelor’s Degree

3. MANAGING CONSULTANT: (SINs 541330ENG and 541611)

Minimum General Experience:

A BRG Managing Consultant has a minimum of eight years of construction, engineering and/or consulting experience.

Functional Responsibility:

A BRG Managing Consultant controls and supervises client engagements, seeking to increase their technical skills, develop staff, and seek new client opportunities through marketing efforts. Other responsibilities include reviewing work papers, documents, and reports for accuracy and completeness, conducting discussions with clients about the results of the work performed; directing senior and junior level consultants; reviewing and approving work plans and programs; ensuring that assignments are carried out within the budgeted time and delivery commitments; following the process of the engagement; and helping resolve any problems or issues, as well as reporting any problems or issues as they arise.

Among the tasks that a Managing Consultant would perform for clients, are the following:

Initial drafting of portions of an expert report under the director of the supervising Managing Director or Director on the subjects described in the following bullet points as well as assistance in the preparation of presentations and expert testimony by the Director or Managing Director, if required.

Analysis of project schedules, daily reports, photographs and other documents to determine the existence of any project delays, the extent of such delays, the party or parties responsible for causing the delays, and whether the delays are or are not compensable and/or excusable.

Analysis of labor and productivity records to determine a contractor or a subcontractor’s productivity to determine whether any actions of the government contributed to or caused any deviations from planned productivity. The Managing Consultant will have primary responsibility for the review, assembly and compilation of documents and data to support any of the analyses performed by BRG.

Review of change orders, particularly those that are in dispute or still unresolved, to determine the reasonableness of the amount charged, whether there is proper support for the change, and whether the issue causing
the change is, in fact, a change that would entitle the contractor to additional costs or whether it is part of the original contract scope.
• Engineering and/or architectural analyses of failure of an installation or product, analyses of the quality and constructability of elements of the project’s design documents
• Accounting analysis of the costs of the project, whether the costs were properly supported, whether there is causation between the alleged events and the cost records utilized to support the claimed amount, and other cost accounting issues related to the costs of construction.

Minimum Education: Bachelor’s Degree

4. CONSULTANT: (SINs 541330ENG and 541611)

Minimum General Experience:

A BRG Consultant has a minimum of five years of construction, engineering and/or consulting experience.

Functional Responsibility:

A BRG Consultant performs elements of engagements and oversees sections of engagements with direct supervision. Responsibilities include independently performing major parts of engagements, directing and instructing the work of junior level consultants, reviewing completed work product, and directing revisions, if necessary. Consultants make decisions on routine matters with the assistance of Managing Consultants and Directors.

Among the tasks that a Consultant would perform for clients, are the following:

• Assembling data and supporting documents, as well as limited drafting of portions of expert reports and analyses provided to the client on the subjects described in the following bullet points as well as assistance in preparation of presentations and expert testimony, as directed by more senior personnel.
• Analysis of project schedules, daily reports, photographs and other documents to determine the existence of any project delays, the extent of such delays, the party or parties responsible for causing the delays, and whether the delays are or are not compensable and/or excusable. The Consultant’s role would be to compile key information contained in the schedules and related documents to determine the critical path of the project, or potential critical path delays.
• Analysis of labor and productivity records to determine a contractor or a subcontractor’s productivity to determine whether any actions of the government contributed to or caused any deviations from planned productivity. The Consultant’s role would be to compile productivity data from various sources that might be used to support or rebut a claim for lost production.
• Review of change orders, particularly those that are in dispute or still unresolved, to determine the reasonableness of the amount charged, whether there is proper support for the change, and whether the issue causing the change is, in fact, a change that would entitle the contractor to additional costs or whether it is part of the original contract scope. The Consultant’s role would be to compile and organize the data as well as conducting an initial review of the data.
• Engineering and/or architectural analyses of failure of an installation or product, analyses of the quality and constructability of elements of the project’s design documents. The Consultant’s role would be to compile and organize the data as well as conducting an initial review of the data.
• Accounting analysis of the costs of the project, whether the costs were properly supported, whether there is causation between the alleged events and the cost records utilized to support the claimed amount, and other cost accounting issues related to the costs of construction. The Consultant’s role would be to compile and organize the data as well as conducting an initial review of the data.

Minimum Education: Bachelor’s Degree
5. **SENIOR ASSOCIATE: (SINs 541330ENG and 541611)**

**Minimum General Experience:**

A BRG Senior Associate has a minimum of two years of construction, engineering and/or consulting experience.

**Functional Responsibility:**

A BRG Senior Associate executes specific elements of engagements under direct supervision. They are responsible for becoming familiar with engagements and business area procedures and issues. As experience and proficiency is gained, Senior Associates are expected to undertake more difficult assignments and manage greater responsibility. The responsibilities under this category including the performance of specific tasks are done under the supervision of a Managing Consultant. All activities of a Senior Associate are supervised.

Generally, the Senior Associate will assist in performing the following discrete tasks under the supervision of a Managing Consultant. Among the tasks that a Senior Associate would perform for clients, are the following:

- Assembling data and supporting documents, on the subjects described in the following bullet points as well as assistance in preparation of presentations and expert testimony, as directed by more senior personnel.
- Analysis of project schedules, daily reports, photographs and other documents to determine the existence of any project delays, the extent of such delays, the party or parties responsible for causing the delays, and whether the delays are or are not compensable and/or excusable. The Senior Associate’s role would be to compile key information contained in the schedules and related documents to determine the critical path of the project, or potential critical path delays. For example, a Senior Associate would take project schedules and prepare spreadsheets identifying the critical path, near critical paths, the number of activities within the schedule, the settings used in the computerized schedule, and other schedule metrics that are contained in the computerized construction schedules.
- Analysis of labor and productivity records to determine a contractor or a subcontractor’s productivity to determine whether any actions of the government contributed to or caused any deviations from planned productivity. The Senior Associate’s role would be to compile productivity data from various sources that might be used to support or rebut a claim for lost production, based on direction and supervision received from senior staff members.
- Review of change orders, particularly those that are in dispute or still unresolved, to determine the reasonableness of the amount charged, whether there is proper support for the change. The Senior Associate’s role would be to compile and organize the data as directed by senior staff members.
- Engineering and/or architectural analyses of failure of an installation or product, analyses of the quality and constructability of elements of the project’s design documents. The Senior Associate’s role would be to compile and organize the data as well as conducting an initial review of the data.
- Accounting analysis of the costs of the project, whether the costs were properly supported, whether there is causation between the alleged events and the cost records utilized to support the claimed amount, and other cost accounting issues related to the costs of construction. The Senior Associate’s role would be to compile and organize the data as directed by senior staff members.

**Minimum Education:** Bachelor’s Degree

6. **ASSOCIATE: (SINs 541330ENG and 541611)**

**Minimum General Experience:**

A BRG Associate has less than one year of construction, engineering and/or consulting experience.

**Functional Responsibility:**
Associates execute specific elements of engagements under direct supervision. They are responsible for becoming familiar with engagement and business area procedures and issues. As experience and proficiency is gained, Associates are expected to undertake more difficult assignments and manage greater responsibility. The responsibilities in this category include performing specific tasks under the supervision of a Managing Consultant or Consultant. All activities of an Associate are supervised.

Generally, an Associate will assist in performing the following discrete tasks under the supervision of a Managing Consultant. Among the tasks that a Senior Associate would perform for clients, are the following:

• Assembling data and supporting documents, on the subjects described in the following bullet points as directed by more senior personnel.
• Identification of the project schedules, daily reports, photographs and other documents to determine the existence of any project delays, the extent of such delays, the party or parties responsible for causing the delays, and whether the delays are or are not compensable and/or excusable. The Associate’s role will be to provide an assembly of the relevant data that was prepared on the project at issue. For example, an Associate may be directed to compile a listing of the daily reports showing the performance of discrete work scopes, such as foundations, structural steel or roofing.
• Identification of labor and productivity records to determine a contractor or a subcontractor’s productivity to determine whether any actions of the government contributed to or caused any deviations from planned productivity. The Associate’s role would be to compile the relevant data sources and provide specific computations as directed and supervised by senior staff. For example, an Associate may be asked to compile a listing the number of manhours used to install piping within a given week, as well as the quantity of piping installed, which would then be used to determine the actual production rate. Another example would be to determine which individuals worked consecutive weeks of overtime to determine whether there might be lost productivity due to excessive overtime.
• Compilation of information contained in change orders, particularly those that are in dispute or still unresolved, to determine the reasonableness of the amount charged, whether the supporting documents for the change. The Associate’s role would be to compile and organize the change order data as directed by senior staff members.
• Engineering and/or architectural analyses of failure of an installation or product, analyses of the quality and constructability of elements of the project’s design documents. The Associate’s role would be to compile and organize the data as directed by senior staff members.
• Accounting analysis of the costs of the project, whether the costs were properly supported, whether there is causation between the alleged events and the cost records utilized to support the claimed amount, and other cost accounting issues related to the costs of construction. The Associate’s role would be to compile and organize the data as directed by senior staff members.

Minimum Education: Bachelor’s Degree

7. ADMINISTRATIVE ASSISTANT: (SINs 541330ENG and 541611)

Minimum General Experience:

A minimum of two years of experience in any combination of the following areas: familiarity with personal computers and office applications, typing on a word processor or personal computer, filing and other administrative tasks.

Functional Responsibility:

Administrative support personnel perform project-related clerical tasks in support of the project management team. Duties may include collection of time records on a periodic basis, collection of expense receipts and review of compliance with government billing requirements, collection, draft preparation, organization and maintenance of billing and other contract-related documentation and information, such as security clearance forms, confidentiality agreements and IT security training.
Certain aspects of administrative support that are directly related to a particular engagement are chargeable, such as:

- Searching for documents requested by senior staff in a project database.
- Assembly of documents and binders for expert reports.
- Any reviews of data requested by senior staff. Examples might include review of transcripts to list where a particular issue or phrase was mentioned or used, a listing of daily reports where easily identified work was able to be compiled or a listing of dates where overtime work was performed.

Generally, chargeable tasks performed by administrative assistants are limited to specific tasks that can be performed at a lower cost than utilizing professional staff.

Minimum Education: High School Diploma or GED

8. **FINANCIAL SERVICES MANAGING DIRECTOR: (SIN 541611)**

Minimum General Experience:

A BRG Financial Services Managing Director has a minimum of 15 years financial services advisory and/or industry experience.

Functional Responsibility:

A Financial Services Managing Director has the primary responsibility to manage BRG’s client relationships and to administer the services provided to them. They provide the highest level of expert client service experience and expertise. Financial Services Managing Directors participate in program and project management, staff development, technical effectiveness, marketing, and sales. Financial Services Managing Directors have final authority in the conduct of engagements and full responsibility for the work performed, including overall project management, quality control, and final review of any work product.

Among the tasks that a Financial Services Managing Director would perform for clients, are the following:

- A Financial Services Managing Director serves as the senior subject matter expert in an area of relevant management/financial consulting such as enterprise risk management, regulatory compliance, technology strategy, operations (including competitive sourcing support), program/portfolio management, financial strategy and operations including public/private partnerships, financial management, or a related field.
- Leading engagement planning, to include the delivery of the engagement vision and mission, work plans, staffing, and financials.
- Supporting critical business and operational areas to provide complete life-cycle support to enable and achieve missions that more effectively manage risk, schedule, cost, and scope.
- Defining and reviewing project plans, designs, and business and systems analysis.
- Creating competitive strategies.
- Overseeing projects based upon the client’s specifications and standards.
- Performing operations, regulatory compliance, financial, program management and marketing analyses required for life cycle support planning.
- Coordinating development of the strategy to provide solutions to client issues.
- Providing quality assurance oversight throughout a project’s life cycle.
- Providing the primary strategy interface with client.
- Delivering presentations and leads strategic level client meetings.
- Accountable for the completion of projects within estimated time frames and budget constraints.

Minimum Education: Master’s Degree
9. **FINANCIAL SERVICES DIRECTOR: (SIN 541611)**

**Minimum General Experience:**

A BRG Financial Services Director has a minimum of ten years financial services advisory and/or industry experience.

**Functional Responsibility:**

Financial Services Directors manage BRG’s client relationships and administer the services provided to them. Financial Services Directors participate in engagement management, staff development, technical effectiveness, marketing, and sales. Financial Services Directors have primary authority in the conduct of engagements and full responsibility for the work performed, including overall project management, quality control, and final review of any work product.

Among the tasks that a Financial Services Director would perform for clients where the Financial Services Director has primary responsibility, are the following:

- A Financial Services Director serves as the program manager or subject matter specialist in an area of relevant management/financial consulting such as enterprise risk management, regulatory compliance, technology strategy, operations (including competitive sourcing support), program/portfolio management, financial strategy and operations including public/private partnerships, financial management, or a related field.
- Providing expert advice on the overall engagement’s vision and delivery.
- Interfacing with the client regarding strategic goals and issues.
- Performing analyses required for life cycle support planning.
- Dealing with overarching issues and coordinating problem solutions.
- Overseeing the program team and daily operations of development within time frames and budget.
- Delivering strategic level client meetings.

**Minimum Education:** Master’s Degree

10. **FINANCIAL SERVICES ASSOCIATE DIRECTOR: (SIN 541611)**

**Minimum General Experience:**

A BRG Financial Services Associate Director has a minimum of eight years financial services advisory and/or industry experience.

**Functional Responsibility:**

Financial Services Associate Directors manage BRG’s client relationships and administer the services provided to them. Financial Services Associate Directors participate in engagement management, staff development, technical effectiveness, marketing, and sales. Financial Services Associate Directors have primary authority in the conduct of engagements full responsibility for the work performed. Financial Services Associate Directors make decisions on overall project management, quality control, and final review of any work product with the assistance of Financial Services Directors and Financial Services Managing Directors.

Among the tasks that a Financial Services Associate Director would perform for clients where the Financial Services Director has primary responsibility, are the following:

- A Financial Services Associate Director serves as the program manager or subject matter specialist in an area of relevant management/financial consulting such as enterprise risk management, regulatory...
compliance, technology strategy, operations (including competitive sourcing support), program/portfolio management, financial strategy and operations including public/private partnerships, financial management, or a related field.

- Providing expert advice on the overall engagement’s vision and delivery.
- Providing guidance and direction on a day-to-day basis.
- Fostering and managing the relationships between the client and the engagement team.
- Resolving client problems and suggesting creative solutions and recommendations.
- Reviewing work products for completeness and adherence to customer requirements.
- Directing the completion of project specific tasks within estimated time frames and budget constraints.
- Delivering presentations and leading client meetings.
- Ensuring that projects are completed on time and within budget constraints.

Minimum Education: Masters’s Degree

11. FINANCIAL SERVICES SENIOR MANAGING CONSULTANT: (SIN 541611)

Minimum General Experience:

A BRG Financial Services Senior Managing Consultant has a minimum of six years financial services advisory and/or industry experience.

Functional Responsibility:

A BRG Financial Services Senior Managing Consultant controls and supervises client engagements, seeking to increase their technical skills, develop staff, and seek new client opportunities through marketing efforts. Other responsibilities include reviewing work papers, documents, and reports for accuracy and completeness; conducting discussions with clients about the results of the work performed; directing senior and junior level consultants; reviewing and approving work plans and programs; ensuring that assignments are carried out within the budgeted time and delivery commitments; following the process of the engagement; and helping resolve any problems or issues, as well as reporting any problems or issues as they arise.

Among the tasks that a Financial Services Senior Managing Consultant would perform for clients, are the following:

- A Financial Services Senior Managing Consultant serves as the project manager or functional specialist in an area of relevant management/financial consulting such as enterprise risk management, regulatory compliance, technology strategy, operations (including competitive sourcing support), program/portfolio management, financial strategy and operations including public/private partnerships, financial management, or a related field.
- Leading project planning, to include the project vision and mission, work plans, staffing, financials, and risks.
- Ensuring the consistent application of proficient methodologies.
- Implementing practical solutions and methodologies.
- Investigating problems using analysis, experience, and judgment.
- Diagnosing client issues and developing solutions.
- Selecting the most relevant tools/techniques to meet specific client requirements.
- Drafting and reviewing work products for completeness and adherence to customer requirements.
- Delivering presentations and leading client meetings.

Minimum Education: Bachelor’s Degree
12.  FINANCIAL SERVICES MANAGING CONSULTANT: (SIN 541611)

Minimum General Experience:

A BRG Financial Services Managing Consultant has a minimum of five years financial services advisory and/or industry experience.

Functional Responsibility:

A BRG Financial Services Managing Consultant controls and supervises client engagements, seeking to increase their technical skills, develop staff, and seek new client opportunities through marketing efforts. Other responsibilities include reviewing work papers, documents, and reports for accuracy and completeness; conducting discussions with clients about the results of the work performed; directing senior and junior level consultants; reviewing and approving work plans and programs; ensuring that assignments are carried out within the budgeted time and delivery commitments; following the process of the engagement; and helping resolve any problems or issues, as well as reporting any problems or issues as they arise.

Among the tasks that a Financial Services Managing Consultant would perform for clients, are the following:

- A Financial Services Managing Consultant serves as a project manager or functional specialist on projects related to an area of relevant management/financial consulting such as enterprise risk management, regulatory compliance, technology strategy, operations (including competitive sourcing support), program/portfolio management, financial strategy and operations including public/private partnerships, financial management, or a related field.
- Leading project planning, to include the project vision and mission, work plans, staffing, financials, and risks.
- Ensuring the consistent application of proficient methodologies.
- Implementing practical solutions and methodologies.
- Investigating problems using analysis, experience, and judgment.
- Diagnosing client issues and developing solutions.
- Selecting the most relevant tools/techniques to meet specific client requirements.
- Drafting and reviewing work products for completeness and adherence to customer requirements.
- Delivering presentations and leading client meetings.

Minimum Education:  Bachelor’s Degree

13.  FINANCIAL SERVICES CONSULTANT: (SIN 541611)

Minimum General Experience:

A BRG Financial Services Consultant has a minimum of three years financial services advisory and/or industry experience.

Functional Responsibility:

A BRG Financial Services Consultant performs elements of engagements and oversees sections of engagements with direct supervision. Responsibilities include independently performing major parts of engagements, directing and instructing the work of junior level Financial Services Consultants, reviewing completed work product, and directing revisions, if necessary. Financial Services Consultants make decisions on routine matters with the assistance of Financial Services Managing Consultants, Financial Services Directors, and Financial Services Associate Directors.

Among the tasks that a Financial Services Consultant would perform for clients, are the following:
- A Financial Services Consultant serves as a consulting team lead or senior consultant on projects related to an area of relevant management/financial consulting such as enterprise risk management, regulatory compliance, technology strategy, operations (including competitive sourcing support), program/portfolio management, financial strategy and operations including public/private partnerships, financial management, or a related field.
- Completing project-specific tasks and client presentations.
- Defining and guiding sub-tasks of a project’s business and technical needs.
- Analyzing client issues and project data, and developing appropriate deliverables using the firm’s tools.
- Performing analysis and diagnosing client issues.
- Building organizational design models.
- Directing junior staff on project requirements and tasks.
- Implementing operational systems, processes, and policies.
- Planning and defining the deliverable structure and content.
- Selecting the most relevant tools/techniques to meet specific client requirements.
- Implementing practical solutions and methodologies.
- Applying quality standards to work products.

**Minimum Education:** Bachelor’s Degree

### 14. FINANCIAL SERVICES SENIOR ASSOCIATE: (SIN 541611)

**Minimum General Experience:**

A BRG Financial Services Senior Associate has a minimum of two years financial services advisory and/or industry experience.

**Functional Responsibility:**

A BRG Financial Services Senior Associate executes specific elements of engagements under direct supervision. They are responsible for becoming familiar with engagements and business area procedures and issues. As experience and proficiency is gained, Financial Services Senior Associates are expected to undertake more difficult assignments and manage greater responsibility. The responsibilities under this category including the performance of specific tasks that are done under the supervision of a Financial Services Managing Consultant. All activities of a Financial Services Senior Associate are supervised.

Generally, the Financial Services Senior Associate will assist in performing the following discrete tasks under the supervision of a Financial Services Managing Consultant. Among the tasks that a Financial Services Senior Associate would perform for clients, are the following:

- A Financial Services Senior Associate serves as a staff/team member on management/financial consulting projects in an area of relevant management/financial consulting such as enterprise risk management, regulatory compliance, technology strategy, operations (including competitive sourcing support), program/portfolio management, financial strategy and operations including public/private partnerships, financial management, or a related field.
- Completing assigned engagement tasks and deliverables.
- Conducting research, collecting, and distilling data.
- Analyzing business requirements and defining applicable tools and methodologies.
- Supporting the implementation of business solutions, process improvement diagnoses, process modeling, and documentation and benchmarking activities.
- Contributes to presentations and client meetings.

**Minimum Education:** Bachelor’s Degree
15.  FINANCIAL SERVICES ASSOCIATE: (SIN 541611)

Minimum General Experience:

A BRG Financial Services Associate has a minimum of one year of general work experience.

Functional Responsibility:

Financial Services Associates execute specific elements of engagements under direct supervision. They are responsible for becoming familiar with engagement and business area procedures and issues. As experience and proficiency is gained, Financial Services Associates are expected to undertake more difficult assignments and manage greater responsibility. The responsibilities in this category include performing specific tasks under the supervision of a Financial Services Managing Consultant or Financial Services Consultant. All activities of a Financial Services Associate are supervised.

Generally, a Financial Services Associate will assist in performing the following discrete tasks under the supervision of a Financial Services Managing Consultant. Among the tasks that a Financial Services Associate would perform for clients, are the following:

- A Financial Services Associate serves as a staff/team member on management/financial consulting projects in an area of relevant management/financial consulting such as enterprise risk management, regulatory compliance, technology strategy, operations (including competitive sourcing support), program/portfolio management, financial strategy and operations including public/private partnerships, financial management, or a related field.
- Completing assigned engagement tasks for deliverable requirements.
- Conducting research, and collecting and distilling data.

Minimum Education:  Bachelor’s Degree

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<thead>
<tr>
<th>Education/Experience Equivalency Policy</th>
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<tbody>
<tr>
<td>A Bachelor’s Degree and two years of additional experience equals a Master’s Degree</td>
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<tr>
<td>A Master’s Degree may be substituted for two years of the required experience with a Bachelor’s Degree</td>
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<tr>
<td>A Doctorate Degree equals a Master’s Degree with four years of experience or a Bachelor’s Degree with six years of experience</td>
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