GENERAL SERVICES ADMINISTRATION
Federal Supply Service
Authorized Federal Supply Schedule Price List

Legatum LLC
2017 Woodford Road
Vienna, VA 22182
(P) 571-685-8995 (F) 000-000-0000
https://legatum-llc.com
Contract Administrator: David P Hassett, dhassett@legatum-llc.com

Schedule Title: Multiple Award Schedule
Federal Supply Group: Information Technology

Contract Number: 47QTCA22D0064

Period Covered by Contract: 03/24/22 – 03/23/27

Business Size: Economically Disadvantaged Women-Owned Small Business (EDWOSB)

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.

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

Pricelist current through Modification #PO001, dated 03/24/2022.
CUSTOMER INFORMATION:

1. **Awarded Special Item Number(s):**

<table>
<thead>
<tr>
<th>SIN</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>54151HEAL</td>
<td>Health Information Technology Services</td>
</tr>
<tr>
<td>611420</td>
<td>Information Technology Training</td>
</tr>
<tr>
<td>OLM</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: See page 4.

1c. Descriptions of all corresponding commercial job titles with experience, functional responsibility and education are provided beginning on page 6.

2. **Maximum Order:** For SIN 54151HEAL - $500,000
    For SIN 611420 and OLM - $250,000

3. **Minimum Order:** $100

4. **Geographic Coverage:** Domestic

5. **Point of Production:** Same as Company Address

6. **Prices Shown Herein are Net** (discount deducted)

7. **Quantity Discount:** None

8. **Prompt Payment Terms:** Net 30. 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:** Legatum LLC shall deliver or perform services in accordance with the terms negotiated in an agency’s order.

10b. **Expedited Delivery:** Consult with Contractor

10c. **Overnight/2-Day Delivery:** Consult with Contractor

10d. **Urgent Requirements:** Consult with Contractor

11. **FOB Point:** Destination
12a. Ordering Address: Legatum Operations
   ATTN: David P Hassett
   2017 Woodford Road
   Vienna, VA 22182
   (P) 571-685-8990 (F) 000-000-0000
dhassett@legatum-llc.com

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

13. Payment Address: Accounts Receivable
   ATTN: AR Department
   2017 Woodford Road
   Vienna, VA 22182
   (P) 202-427-5219 (F) 703-242-1960
   mitch@legatum-llc.com

14. Warranty Provisions: Contractor’s Standard Warranty

15. Export Packing charges: Not applicable

16. Terms and conditions of rental, maintenance, and repair: Not applicable

17. Terms and conditions of installation: Not applicable

18a. Terms and conditions of repair parts: Not applicable

18b. Terms and conditions for any other services: Not applicable

19. List of service and distribution points: Not applicable

20. List of participating dealers: Not applicable

21. Preventive maintenance: Not applicable

22a. Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants: Not applicable


23. Unique Entity Identifier (UEI) Number: 117181348

24. Legatum LLC is registered in the System for Award Management (SAM) database.
<table>
<thead>
<tr>
<th>SIN</th>
<th>Labor Category</th>
<th>03/24/22 – 03/23/23</th>
<th>03/24/23 – 03/23/24</th>
<th>03/24/24 – 03/23/25</th>
<th>03/24/25 – 03/23/26</th>
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</table>
The Service Contract Labor Standards (SCLS) are applicable to this contract as it applies to the entire Consolidated MAS Schedule and all services provided. While no specific labor categories have been identified as being subject to SCLS due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29 CRF 541.300), this contract still maintains the provisions and protections for SCLS eligible labor categories. If and/or when the contractor adds SCLS labor categories/employees to the contract through the modification process, the contractor must inform the Contracting Officer and establish a SCLS matrix identifying the GSA labor category titles, the occupational code, SCLS labor category titles and the applicable WD number. Failure to do so may result in cancellation of the contract.

<table>
<thead>
<tr>
<th>Code</th>
<th>Training Description</th>
<th>I</th>
<th>II</th>
<th>III</th>
<th>IV</th>
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<td>$160.57</td>
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</tbody>
</table>
HIT Business Intelligence Analyst I

**Functional Responsibility:** Participates in Health IT business intelligence analysis activities. Gathers business intelligence from various sources such as company data, industry reports, public information, interviews, surveys, and requirement workshops. Assesses current market strategies by analyzing related Health IT products, markets, or trends. Reviews and analyzes data to formulate business insights, improve system/process efficiencies, and maximize business value. Manages and updates large amounts of data by leveraging effective database querying and data mining approaches. Reviews customer files to ensure the integrity of data collection and utilization. Compiles business intelligence information to support actionable Health IT recommendations through data visualizations and effective communication of findings. Supervision required.

**Minimum Education:** Bachelors
**Minimum Experience:** 4 years

HIT Business Intelligence Analyst II

**Functional Responsibility:** Leads Health IT business intelligence analysis activities. Gathers and analyzes business intelligence from various sources such as company data, industry reports, public information, interviews, surveys, and requirement workshops. Assesses current market strategies by analyzing related Health IT products, markets, or trends. Reviews and analyzes data to formulate business insights, improve system/process efficiencies, and maximize business value. Manages and updates large amounts of data by leveraging effective database querying and data mining approaches. Reviews customer files to ensure the integrity of data collection and utilization. Compiles business intelligence information to support actionable Health IT recommendations through data visualizations and effective communication of findings. Identifies opportunities to improve processes and strategies with technology solutions. No supervision required.

**Minimum Education:** Bachelors
**Minimum Experience:** 6 years

HIT Help Desk Specialist I

**Functional Responsibility:** Provides technical assistance and support for incoming queries and issues related to Health IT computer systems, software, and hardware. Serves as initial point of contact for program services. Supports chat, phone, email, web, and/or in-person support to users. Facilitates help
desk and support tickets in a timely manner. Redirects unresolved issues to the next level of support personnel. Maintains record of problems and their resolution. Supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 2 years

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**HIT Information Assurance Risk Manager I**  
**Functional Responsibility:** Conducts surveillance and routine audits to ensure risk management, information assurance policies and procedures are followed for Health IT systems. Coordinates with technology staff to detect and monitor intrusion activities and system vulnerabilities. Collaborates with IT and cyber-security programs to ensure appropriate procedures and processes are in place in the event of a disaster or data breach. Reduces risk vulnerabilities by leveraging new technology, approaches, and security patches to enhance security features. Supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years

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**HIT Project Control Analyst II**  
**Functional Responsibility:** Implements planning, review, control, startup execution, and closeout processes for moderately complex Health IT projects. Analyzes problems for root cause and identifies corrective actions. Supports cost and schedule development, controls, Work Breakdown Structures, and Basis of Estimates. Applies principles of finance and accounting to analyze financial statements for monthly/quarterly/annual financial Outlooks, Annual Operating Plans, Estimates at Completion, and contractual deliverables. Leads internal financial activities such as invoicing support, accruals, program financial revenue projections and variance analysis. Provides ad-hoc cost and performance analysis. Strong competencies with Microsoft Excel or other similar desktop tools that provide capabilities to collect and analyze information. Strong organization, analytical, presentation and interpersonal skills. No supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years

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**HIT Project Coordinator III**  
**Functional Responsibility:** Supports the project lead or project manager to ensure complex Health IT Projects are completed on time, within budget, and in accordance with the task order and contract requirements. Leverages project management tools to monitor task order activities such as actuals versus planned hours, burn rates by labor categories, budgets, and deliverables. Identifies project risks and potential mitigation approaches. Serves as a central point of contact for project status. As directed, coordinates project meetings/reviews, generates required reports, interfaces with finance, and maintains project documentation. Provides supervision to other Project Coordinators, as required.
Minimum Education: Bachelors
Minimum Experience: 6 years

**HIT Project Manager I**

**Functional Responsibility:** Plans, organizes, monitors, and controls the execution of Health IT projects to ensure they are completed on time, on budget, and within scope. Assists program management with schedule and budget reviews, participates in project technical reviews, and contributes to deliverables. Supports risk management activities to identify potential issues and supports corrective actions to ensure projects are completed in accordance with quality standards and contractual requirements. Supervision required.

Minimum Education: Bachelors
Minimum Experience: 2 years

**HIT Project Manager II**

**Functional Responsibility:** Plans, organizes, monitors, and controls the execution of moderately complex Health IT projects to ensure they are completed on time, on budget, and within scope. Supports program management with staffing, schedule development, and budget reviews. Participates in project technical reviews and contributes to deliverables. Supports risk management activities to identify potential issues and implements corrective actions to ensure projects are completed in accordance with quality standards and contractual requirements. No supervision required.

Minimum Education: Bachelors
Minimum Experience: 5 years

**HIT Project Manager III**

**Functional Responsibility:** Leads, plans, organizes, monitors, and controls the execution of complex Health IT projects to ensure they are completed on time, on budget, and within scope. Responsible for project staffing, schedule development, budget activities, and deliverables. Oversees the assignment of project tasks. Coordinates project communication with the team including technical staff, human resources, finance, contracts, procurement, technical writers, and training coordinators. Oversees stakeholder engagement. Leads project technical reviews and contributes to deliverables as required. Coordinates customer system demonstrations. Leads risk management reviews to identify potential issues and implements corrective actions, as required, to ensure projects are completed in accordance with quality standards and contractual requirements. Provides supervision to other Project Managers, as required.

Minimum Education: Bachelors
Minimum Experience: 8 years

**HIT Risk Management Analyst III**

**Functional Responsibility:** Identifies, measures, evaluates, and monitors project/program risks and reoccurring issues for complex Health IT projects and services. Collaborates with internal and external
stakeholders to facilitate risk and issue identification, prioritization, potential impact, root cause analysis, and mitigation approaches/strategies. Develops and reviews corrective action plans. Generates reports to track status and resolution. Leads continuous improvement initiatives and risk management training across the organization. Conducts gap analyses between current and targeted states of risk management in the organization. Provides supervision to other Risk Management Analysts, as required.

Minimum Education: Bachelors  
Minimum Experience: 8 years

**HIT Scheduler I**  
**Functional Responsibility:** Supports the development and maintenance of Health IT Project Schedules and project work breakdown structures (WBS). Leverages software tools, (e.g., MS Project) to document project milestones, tasks, the duration of tasks, resources required to complete tasks, and critical paths. Supports the definition and analysis of relationship dependencies between tasks. Follows established quality assurance and configuration management control processes. Requires supervision.

Minimum Education: Bachelors  
Minimum Experience: 2 years

**HIT Scheduler II**  
**Functional Responsibility:** Develops, updates, and maintains moderately complex Health IT Project Schedules. Defines project work breakdown structures (WBS). Leverages software tools, (e.g., MS Project) to document project milestones, tasks, the duration of tasks, resources required to complete tasks, and critical paths. Defines / analyzes relationship dependencies between tasks. Responsible for status monitoring, project reporting, and risk analyses. Follows established quality assurance and configuration management control processes. No Supervision Required.

Minimum Education: Bachelors  
Minimum Experience: 4 years

**HIT Software Developer I**  
**Functional Responsibility:** Designs, develops, tests, and implements Health IT computer software to meet customer requirements to support a variety of functional and technical environments. Develops solutions to fulfill customer interface requirements involving health information exchanges, dashboards, reports, and information queries. Reviews existing programs and implements enhancements to improve response times and streamlines data entry requirements. Requires supervision.

Minimum Education: Bachelors  
Minimum Experience: 2 years

**HIT Software Developer II**  
**Functional Responsibility:** Designs, develops, tests, and implements moderately complex Health IT computer software to meet customer requirements to support a variety of functional and technical
environments. Develops solutions to fulfil customer interface requirements involving health information exchanges, dashboards, reports and information queries. Reviews existing programs and implements enhancements to improve response times and streamlines data entry requirements. No supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years

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**HIT Subject Matter Expert III**  
**Functional Responsibility:** Plan, design, and implement complex Health IT enterprise architecture strategies and approaches to align functional, technical, user interface/response time, throughput, and budget requirements. Oversee enterprise and interface architecture support such as analysis, design, smoke testing, quality assurance testing, integration validation, break/fix analysis, and go-live support. Based on customer requirements, leads working sessions to define acceptance criteria and ensure appropriate technical standards and procedures are met. Leverages new technologies and approaches to enhance system performance and reduce operating costs. Provides supervision to other System Architects, as required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 10 years

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**HIT System Architect I**  
**Functional Responsibility:** Assists with system engineering and infrastructure activities for Health IT systems and web applications. These activities may consist of system planning, information security planning, cloud computing architecture, performance management, capacity planning, risk assessments, system assessments, gap analysis, benchmarking, and information engineering. Assists development teams with acceptance testing, troubleshooting, load testing, and performance tuning. Supports project lead with managing and prioritizing sprint backlogs. Optimizes installed systems and infrastructure to meet customer requirements. Analyzes and develops technical documentation as required. Supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 2 years

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**HIT System Engineer II**  
**Functional Responsibility:** Researches, develops, writes, edits, and proofreads content for moderately complex Health IT technical and functional documentation. Supports the development of deliverables by following and ensuring compliance with government agency protocols, procedures, and templates. Interviews and coordinates with subject matter experts (SMEs), as required, to obtain input and feedback on documentation. Ensures deliverables and schedules meet customer requirements with careful adherence to configuration management and quality controls. Supports documentation peer
reviews. As required, provides modification and editing support during the customer feedback process. No Supervision Required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years

**HIT Technical Writer I**  
**Functional Responsibility:** Provides technical/functional expertise for Health IT systems in the areas of health information exchanges, electronic health records, informatics, systems architecture, risk management, and software development methodologies. Specific focus areas include requirements definition, system design, software development, hardware configuration, operational environment optimization, system security, medical expertise, implementation and integration approaches, interface streamlining, throughput analyses, business processes, and change management. Leads focused systems analyses, conducts integration analyses, recommends system improvements, and process streamlining. Applies specialized knowledge to resolve technical problems and process gaps. Minimal supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 2 years

**HIT Technical Writer II**  
**Functional Responsibility:** Provides technical/functional expertise for moderately complex Health IT systems in the areas of health information exchanges, electronic health records, informatics, systems architecture, risk management, and software development methodologies. Specific focus areas include strategy development, requirements definition, system design, software development, hardware configuration, operational environment optimization, system security, medical expertise, implementation and integration approaches, interface streamlining, throughput analyses, business processes, training, and change management. Leads focused systems analyses, design reviews, conducts integration analyses, recommends system improvements, and process streamlining. Applies specialized knowledge to resolve technical problems and process gaps. No supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years
**Experience & Degree Substitution Equivalencies**

Experience exceeding the minimum shown may be substituted for education. Likewise, education exceeding the minimum shown may be substituted for experience.

<table>
<thead>
<tr>
<th>Equivalent Degree</th>
<th>Experience</th>
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</thead>
<tbody>
<tr>
<td>Associate’s</td>
<td>High School/GED + 2 years relevant experience</td>
</tr>
<tr>
<td>Bachelor’s</td>
<td>Associate’s degree + 2 years relevant experience or High School/GED + 4 years relevant experience</td>
</tr>
<tr>
<td>Master’s</td>
<td>Bachelor’s + 2 years relevant experience or Associate’s degree + 4 years relevant experience or High School/GED + 6 years of relevant experience</td>
</tr>
<tr>
<td>Doctorate</td>
<td>Master’s + 2 years relevant experience or Bachelor’s + 4 years or Associate’s + 6 years relevant experience or High School/GED + 8 years relevant experience</td>
</tr>
</tbody>
</table>
Labor Category Descriptions
SIN 611420

**Trainer I**

**Functional Responsibility:** Organize, prepare, and conduct training classes (in person and on-line) for students. Develop, update, and review training materials including lesson plans, presentations, demonstrations, and quick reference guides. Maintain records for training activities, trainee progress, and overall program effectiveness. Operate training facilities and equipment. Support peer reviews. Requires supervision.

**Minimum Education:** Bachelors

**Minimum Experience:** 2 years

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**Trainer II**

**Functional Responsibility:** Organize, prepare, and conduct moderately complex training classes (in person and on-line) for students. Develop, update, and review training curriculum and materials including lesson plans, presentations, demonstrations, and quick reference guides. Maintain records for training activities, trainee progress, and overall program effectiveness. Operate training facilities and equipment. As required, conduct additional classes to meet special needs or unique requirements. Support peer reviews. Support end user focus meetings to gather input/feedback regarding the training process and to identify training gaps. Supports training timeline based on strategic goals. No supervision required.

**Minimum Education:** Bachelors

**Minimum Experience:** 4 years

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**Training Adoption Coach I**

**Functional Responsibility:** Provides end-user one-on-one coaching at customer locations to proactively assist with the implementation and adoption of new solutions and workflow tasks. Facilitates bi-directional feedback between the project team and end-users to improve open communication, reduce resistance to change, increase adoption acceptance, and provide quick-turn issue resolution. Leverages training policies, procedures, and organizational goals to determine appropriate actions and customized support to meet unique customer needs. Adoption coaches may have experience in information technology, the healthcare industry, training, or leadership/team coaching. Requires supervision.

**Minimum Education:** Bachelors

**Minimum Experience:** 2 years

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**Training Adoption Coach II**

**Functional Responsibility:** Provides end-user one-on-one coaching at customer locations to proactively support the implementation and acceptance of moderately complex solutions and workflow tasks. Facilitates bi-directional feedback between the project team and end-users to improve open communication, reduce resistance to change, increase adoption acceptance, and provide quick-turn
issue resolution. Effectively handles end-user issues and concerns; able to diffuse difficult conversations. Leverages training policies, procedures, and organizational goals to determine appropriate actions and customized support to meet unique customer needs. Adoption coaches may have experience in information technology, the healthcare industry, training, or leadership/team coaching. No supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 6 years

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**Training Call Center Support I**

**Functional Responsibility:** Answers customer calls related to training for programs, systems, policies, services, and processes following established call center protocols. Handles customer questions and de-escalates dissatisfied customers while adhering to established standards, guidelines, and “scripts” for various topics. Engages in active listening to disseminate correct information and accurately document each call. Escalates customer calls as required for additional support. As appropriate, utilizes call center software, databases, and tools. Strives to meet or exceed call center metrics while providing excellent and consistent customer service. Supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 2 years

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**Training Content Developer I**

**Functional Responsibility:** Designs, creates, and updates course materials for training programs and performance support products. Prepares and tests instructor-led training, training materials, computer-based training (CBT), and/or blended learning solutions to support training requirements, such as the release of new/modified systems, leadership approaches, models, and processes. Supports the identification of instructional, learning, and/or performance objectives. Updates and maintains existing training materials such as lesson plans/curriculum, Standard Operating Procedures (SOPs), learning objectives, user and instructor guides, handouts, practical exercises, and other training materials. Analyzes training evaluations. Supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 2 years

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**Training Content Developer II**

**Functional Responsibility:** Designs, creates, and updates course materials for moderately complex training programs and performance support products. Creates and tests instructor-led training, training materials, computer-based training (CBT), and/or blended learning solutions to support training requirements, such as the release of new/modified systems, leadership approaches, models, and processes. Defines instructional, learning, and/or performance objectives. Updates and maintains existing training materials such as lesson plans/curriculum, Standard Operating Procedures (SOPs),
learning objectives, user and instructor guides, handouts, practical exercises, and other training materials. Analyzes training evaluations. No supervision is required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years

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**Training Documentation Architect II**  
**Functional Responsibility:** Provides writing, editing, and analysis support for creating and modifying moderately complex training project documents, including presentation materials, participant guides, handouts, job aids, data call responses, and governance memoranda. Analyzes documentation requirements to create content outlines and structure. Facilitates working sessions with management, functional and technical subject matter experts (SMEs) to gather input and formulate strategies for document content. Leads efforts to ensure clarity, consistency, and accuracy across project documentation while ensuring documents meet customer quality and technical standards. No supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years

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**Training Specialist I**  
**Functional Responsibility:** Conduct training classes (in person and on-line) for participants, including management, technical and functional staff. Maintain records for training activities, trainee progress, and overall program effectiveness. Equip end-users with application and functional/technical workflow knowledge. Facilitate peer reviews. No supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 2 years

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**Training Specialist II**  
**Functional Responsibility:** Conduct training classes (in person and on-line) for participants, including management, technical and functional staff. Maintain records for training activities, trainee progress, and overall program effectiveness. Equip end-users with application and functional/technical workflow knowledge. Facilitate peer reviews. No supervision required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years

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**Training Strategist II**  
**Functional Responsibility:** Develops and improves the curriculum strategy and learning program execution for moderately complex training programs. Determines the content to be delivered, themes for the training material, delivery method for training, course duration, and timing for training.
consumption. Defines program initiatives, session objectives, and module-level requirements. Coordinates changes to the curriculum using methodologies, such as Kirkpatrick’s Levels of Evaluation, to determine the effectiveness of training. Oversees the updates to materials by identifying, documenting, and authorizing necessary changes to the training program. Maintains the training events schedules. Supports and fulfills staffing expectations where needed. Manages training risks, issues, and mitigations. Supports challenges and action items for the training workgroups. No supervision is required.

**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years

**Experience & Degree Substitution Equivalencies**  
Experience exceeding the minimum shown may be substituted for education. Likewise, education exceeding the minimum shown may be substituted for experience.

<table>
<thead>
<tr>
<th>Equivalent Degree</th>
<th>Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate’s</td>
<td>High School/GED + 2 years relevant experience</td>
</tr>
<tr>
<td>Bachelor’s</td>
<td>Associate’s degree + 2 years relevant experience or High School/GED + 4 years relevant experience</td>
</tr>
<tr>
<td>Master’s</td>
<td>Bachelor’s + 2 years relevant experience or Associate’s degree + 4 years relevant experience or High School/GED + 6 years of relevant experience</td>
</tr>
<tr>
<td>Doctorate</td>
<td>Master’s + 2 years relevant experience or Bachelor’s + 4 years or Associate’s + 6 years relevant experience or High School/GED + 8 years relevant experience</td>
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