



KAUFFMAN & ASSOCIATES, INC.

General Services Administration

00CORP Consolidated Schedule

Contractor: Kauffman and Associates, Inc.
S. 165 Howard Street Suite 200
Spokane, WA 99201-4444
Telephone: (509) 747-4994
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Website: www.kauffmaninc.com

DUNS Number: 88-446-7259

Contract Number: GS-00F-0012S

Contract Period: August 07 2006 through August 06, 2011

1. Issued by: General Services Administration
Management Services Center
Acquisition Division
400 15th Street Sw
Auburn, WA 98001
2. This acquisition is: Unrestricted.
3. Method for solicitation: RFP
4. Deliver to: To be shown on each order issued under any contract
resulting from this solicitation
5. Administered by: As specified in the award.
6. Payment will be made by: To be shown on each order issued under any
contract resulting from this solicitation
7. Solicitation incorporates by reference FAR 52.212-1, FAR 52.212-3, and
52.212-5

8. Awarded Special Item Numbers (SINs):
 - **C R499: sub-SINs 874-1 and 874-2**
 - **C R422: sub-SIN 541-4F (small business set-aside)**
 - **C R708: sub-SIN 541-4F (small business set-aside)**
 - **C R701: sub-SIN 541-4F (small business set-aside)**
9. In accordance with Clause 552.238-75 Price Reductions, the category of customers on which this award is predicated is Kauffman & Associates, Inc.'s Most Favored Customer class of all commercial, web design, graphic and photography clients' as specified on their Commercial Sales Practices Format. GSA receives a minimum 32% discount from their Commercial Rates.
10. Kauffman & Associates, Inc. is offering commercial services but do not have a commercial published price list from which they establish their government rates. Non-commercial price breakdown information was submitted as supporting documentation.
11. The Economic Price Adjustment Clause I-FSS-969 is applicable after the first 12 months of the contract period, and shall be adjusted in accordance with the negotiated and approved fixed escalation of 3.8% per year.
12. Pricing is awarded for the base period only and includes 3, five year options.
13. Kauffman & Associates, Inc.'s commercial practice is to bill customers based upon the base rate for each individual assigned to the task, which may be less than the maximum rate used to establish GSA rates. KAI will continue to follow this practice under the GSA Schedules program.
14. Kauffman & Associates, Inc. has an acceptable accounting and billing systems to accurately track labor Hour task orders, and will accept FFP and LH task orders.
15. Kauffman & Associates, Inc. is a small business and therefore no small business subcontracting plan is required.
16. Prompt Payment Discount Terms: Net 30 days
17. Minimum Order: \$100.00
18. Maximum Order: \$1,000,000
19. Scope of Contract — Worldwide: Domestic and Overseas Delivery

20. FOB: Destination

21. Kauffman & Associates, Inc. will accept Payment by Government Purchase Card In accordance with Clause 552.232-77 (Mar 2002) Alternatel-Mar2000).

22. Pursuant to Clause 552.238-74, the Contractor must report the quarterly dollar value of sales under the contract by calendar quarter on electronic GSA Form 72A, Contractor's Report of Sales, to the FSS Vendor Support Center (VSC) Website at Internet, <http://NSC.gsa.gov>. If no sales occur, the contractor must show zero on the report.

23. Pursuant to Clause 552.243-72, Modifications, additional instructions on modification submissions can be found at http://www.acquisition.gov/gsam/current/html/Part552_Sub2B.html#wp1885083

24. This award covers indefinite quantities of products and/or services. No performance or delivery is required until order(s) are received. This contract shall only be used for the services listed (see Scope of Work). Inappropriate use of the contract for other than Consolidated Schedule may subject the contractor/customer agency to penalties provided by statute or regulation.

LABOR CATEGORY DESCRIPTIONS AND PRICE LISTS

Labor Categories for MOBIS, C R499

Labor Category	Definition, Minimum Training, Degrees, and Experience
President/Officer/Project Director	KAI President, Jo Ann Kauffman, MPH, has over 25 years of management experience, working primarily in Native American affairs. She is instrumental in developing the vision and plan for the delivery of services or products for projects. She provides strategic planning, organizational development, and facilitation services nationally.
Officer/Financial & Operations Director	Responsible for contract financials and works closely with project manager to assure the delivery of high quality products and services within budget and on schedule. BA or BS required plus 10+ years experience with accounting or contract management.
Project Manager I	Charged with formulating the project vision and direction and managing a project team of subcontractors, project consultants, in-house subject matter experts, and research assistants. 12+ years of management experience required. Graduate degree required.
Project Manager II	Charged with managing a project team of subcontractors, project consultants, in-house subject matter experts, research assistants. Also responsible for project financials and maintaining communication with government program officials to ensure priorities are met. Communicates with client regularly. BA or BS required, 8+ years of management experience.
Project Manager III	Supports program manager and manages small projects. Facilitates project team coordination, while providing work toward the production of deliverables. Communicates with client as needed. BA or BS required, 5+ years of management experience.
Project Specialist I	Coordinates and conducts research and analysis to support project. Accumulates data from various sources including electronic databases and other electronic sources, interviews, site-visits, and other methods. BA or BS required, 2-3+ years of experience.
Project Specialist II	Supports PM I-III and PS I in conducting research and analysis to support project. Assists with preparing project documents, data management, event coordination, interviews, and site visits. BA or BS preferred, 1-2 years of experience.
Project Specialist III	Supports PM I-III and PS I-II in conducting research and analysis to support project. Assists with preparing project documents, data management, event coordination, interviews, and site visits. BA or BS preferred, 0-1 years of experience.

Director of Research	Provides research methodology direction as well as oversight to KAI research projects. Provides concentrated research for organizational assessments, evaluations, and other studies and supports strategic planning. PhD required.
Subject Matter Expert	Brings subject matter expertise to a project. Subject matter expert has substantive experience and an understanding of the policy implications of a particular issue. Terminal degree required plus 10+ years experience with the particular subject matter.
Support Staff	Provides project support in the areas of travel logistics, event coordination, data entry, and administrative support tasks.

PRICE LIST - 00CORP THE CONSOLIDATED SCHEDULE		
<u>C R499 - Other Professional Services Management, Organization and Business Improvement Services (MOBIS)</u>		
Sub-SINs: 874-1 - Consulting Services, 874-2 Facilitation Services		
Labor Category	8/7/06 through 8/6/07	8/7/07 through 8/6/08
President/Officer/Project Director	\$165.02	\$171.29
Officer/Financial & Operations Director	\$55.01	\$57.10
Project Manager I	\$89.92	\$93.34
Project Manager II	\$83.98	\$87.17
Project Manager III	\$61.09	\$63.41
Project Specialist I	\$50.60	\$52.52
Project Specialist II	\$47.59	\$49.40
Project Specialist III	\$39.59	\$41.09
Director of Research	\$81.97	\$85.08
Subject Matter Expert	\$165.02	\$171.29
Support Staff	\$33.01	\$34.26

Labor Categories for AIMS, C R422, C R708, and C R701 (Sub-SIN 541-4F)

Labor Category	Definition, Minimum Training, Degrees, and Experience
President/Officer/Project Director	KAI President, Jo Ann Kauffman, MPH, has over 25 years of management experience, working primarily in Native American affairs. She is instrumental in developing the vision and plan for the delivery of services or products for projects. She provides strategic planning, organizational development, and facilitation services nationally.
Officer/Financial & Operations Director	Responsible for contract financials and works closely with project manager to assure the delivery of high quality products and services within budget and on schedule. BA or BS required plus 10+ years experience with accounting or contract management.
Project Manager I	Charged with formulating the project vision and direction and managing a project team of subcontractors, project consultants, in-house subject matter experts, and research assistants. 12+ years of management experience required. Graduate degree required.
Project Manager II	Charged with managing a project team of subcontractors, project consultants, in-house subject matter experts, research assistants. Also responsible for project financials and maintaining communication with government program officials to ensure priorities are met. Communicates with client regularly. BA or BS required, 8+ years of management experience.
Project Manager III	Supports program manager and manages small projects. Facilitates project team coordination, while providing work toward the production of deliverables. Communicates with client as needed. BA or BS required, 5+ years of management experience.
Project Specialist I	Coordinates and conducts research and analysis to support project. Accumulates data from various sources including electronic databases and other electronic sources, interviews, site-visits, and other methods. BA or BS required, 2-3+ years of experience.
Project Specialist II	Supports PM I-III and PS I in conducting research and analysis to support project. Assists with preparing project documents, data management, event coordination, interviews, and site visits. BA or BS preferred, 1-2 years of experience.

Project Specialist III	Supports PM I-III and PS I-II in conducting research and analysis to support project. Assists with preparing project documents, data management, event coordination, interviews, and site visits. BA or BS preferred, 0-1 years of experience.
Director of Research	Provides research methodology direction as well as oversight to KAI research projects. Provides concentrated research for organizational assessments, evaluations, and other studies and supports strategic planning. PhD required.
Web Design/IT/Director of Art & Graphics	Provides art and graphic support for studies, briefing books, reports, and presentations. Provides IT and graphic support for a range of media, including web pages, print, and video and programming in many languages including ASP, Coldfusion, PHP and C++. Designs logos, print and web layouts.
IT Support Staff I	Brings Information Technology expertise to provide clients with technological-based solutions to fit the client's management and organizational needs. Works closely with the project manager and the client to deliver the products, services, and ideas tailored to fit the client's need. Provides programming in many languages including ASP, Coldfusion, PHP, and C++. Designs databases. BA or BS required in related field.
IT Support Staff II	Assists in providing Information Technology expertise to clients. Works closely with the IT and Graphic Manager and project managers to deliver the products, services, and ideas tailored to fit the client's need. Provides programming in many languages including ASP, Coldfusion, MySQL, PHP, and C++. Assists in database design and/or conversion. BA or BS required in related field.
Subject Matter Expert	Brings subject matter expertise to a project. Subject matter expert has substantive experience and an understanding of the policy implications of a particular issue. Terminal degree required plus 10+ years experience with the particular subject matter.
Support Staff	Provides project support in the areas of travel logistics, event coordination, data entry, and administrative support tasks.

PRICE LIST - 00CORP THE CONSOLIDATED SCHEDULE

541 - ADVERTISING & INTEGRATED MARKETING SOLUTIONS (AIMS)

541 4 - SPECIALIZED MARKETING SERVICES

Sub-SIN: 541-4F Commercial Art and Graphic Design Services (Small Business Set-Aside)

C R422 Market Research and Public Opinion Services

C R701 Advertising Services

C R708 Public Relations Services

Labor Category	8/7/06 through 8/6/07	8/7/07 through 8/6/08
President/Officer/Project Director	\$165.02	\$171.29
Officer/Financial & Operations Director	\$55.01	\$57.10
Project Manager I	\$89.92	\$93.34
Project Manager II	\$83.98	\$87.17
Project Manager III	\$61.09	\$63.41
Project Specialist I	\$50.60	\$52.52
Project Specialist II	\$47.59	\$49.40
Project Specialist III	\$39.59	\$41.09
Director of Research	\$81.97	\$85.08
Web Design/IT/Director of Art & Graphics	\$44.00	\$45.67
IT Support Staff I	\$50.77	\$52.70
IT Support Staff II	\$44.00	\$45.67
Subject Matter Expert	\$165.02	\$171.29
Support Staff	\$33.01	\$34.26



KALFFMAN & ASSOCIATES, INC.

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Kauffman and Associates, Inc. (KAI) has a 16-year track record of providing high-quality, management and research consulting services for clients including agencies of the federal government, American Indian tribes, non-profit organizations, counties, and businesses.



Jo Ann Kauffman, president and owner of KAI and an enrolled member of the Nez Perce Tribe, has worked in the field of Indian affairs for over 25 years. Her work has ranged from assisting tribal communities and urban Indian health centers to providing national health advocacy and representation. In 1990, she formed KAI providing policy analysis, planning, research, and organizational development support to Indian tribes, intertribal consortia, nonprofit clinics, and numerous agencies of the federal government.

KAI maintains classifications that simplify the procurement process and help agencies meet their small business utilization goals. In addition to being a woman-owned and American Indian-owned business enterprise, KAI is currently certified as:

- GSA (MOBIS and AIMS schedules)
- 8(a)
- HUBZone
- Buy Indian Act
- Small Disadvantaged Business

KAI's management and research consultation services include event coordination, research and evaluation, management support, multimedia product design and development, and website development and database design and management.

Event Coordination

KAI provides high quality event coordination for local, regional, national, and international meetings, roundtables, and conferences ranging in size from 20 to 2,000 people. KAI manages logistics and coordinates all phases of the event planning process, producing high quality products regardless of event size, complexity, location, or subject matter. KAI coordinates site location, hotel negotiations, advance communications, announcements, registration, on-site coordination, agenda coordination, speaker and VIP coordination, recording, reporting, and all related follow-up activities. KAI also provides training, facilitation, and conference planning for federal, state, and tribal entities.

Research and Evaluation

KAI produces user-friendly, culturally appropriate, and scientifically sound reviews and reports. KAI's keen understanding of policy research and planning, especially as it pertains to health disparities and minority communities, has resulted in the production of reports and reviews focusing on topics such as health disparities, determinants, and systems for minority populations. KAI has extensive experience collecting archival, primary, and secondary research and has resulted in numerous literature reviews, reports, and briefing papers. KAI's capacity to write extensive literature reviews is complemented by the staff's honed skills in conducting interviews and leading focus groups to gather information pertinent to



the project. KAI has organized and led meetings and interviews for stakeholders including government officials, subject experts, and the general public.

Management Support

KAI's management support specialties consist of technical assistance and training, facilitation and mediation, organizational consultation, strategic planning, and grant support services. With skilled facilitators, mediators, trainers, and strategists, KAI assists clients with a range of services from providing training for Medicare benefits counselors to facilitating dialogue between tribes and county governments. KAI's experienced and culturally competent staff is continually participating in professional development in areas contributing to the staff's capacity in organizational consultation such as community readiness, group facilitation, and communication trainings.

Multimedia Product Design and Development

KAI has extensive experience in creating and producing high quality graphics for published materials and a range of multimedia products for print, video, and the Internet. In addition, KAI's in-house design and development team has the creative skills, innovation, and experience along with the latest software to create and publish high quality reports and publications. Examples of KAI's design and desktop publishing capabilities have been demonstrated in briefing books, posters, postcards, advertisements, and conference programs and agendas produced for a variety of federal agencies. KAI's graphic design experience in publication development has led to excellent working relationships with printers and lithographers.

Website Development and Database Design and Management

KAI develops websites, web pages, and databases for government agencies, organizations, and small businesses and has developed over 100 websites, web pages, and databases over the last 5 years. In addition to website design and development, KAI staff has expertise in database coding, programming languages, graphics, and software engineering and implementation, network and site administration, and providing customers with technical support.

KAI's primary fields of expertise include:

- Health
- Education
- Business, Community and Economic Development
- Aging and Elders
- Environment
- Cultural Resources

KAI is built upon a culture that values commitment to and passion for our work. With the understanding that our work can improve the health, wellness, and potential of those we serve, KAI is dedicated to producing superior products and services that meet the timelines and requirements of our clients. The KAI team is small enough for effective teambuilding and diverse enough to provide focused leadership on a variety of topics. KAI retains staff who bring experience and training in public health, Medicare/Medicaid, federal Indian law, mental health, alcohol/substance abuse, leadership, international affairs, public administration, organizational development, education, communications, sociology, management solutions, Information Technology, and website development and design.