

**General Services Administration  
Federal Acquisition 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 are available through GSA Advantage!<sup>TM</sup>, a menu-driven database system. The Internet address for GSA Advantage!<sup>TM</sup> is: <http://www.gsaadvantage.gov>  
For more information on ordering from Federal Supply Schedules, click here: <http://www.gsa.gov/schedules-ordering>*

**Consolidated Schedule (00CORP)**

*Please be advised that the following individual Schedule contracts have been migrated to this Consolidated Schedule.  
As a result, no additional stand alone Task Orders can be awarded or BPAs established under these contracts:*

Single Schedule Name	Former Contract Number
FABS	GS-23F-0058T
MOBIS	GS-10F-0289P

**Consolidated Contract No.: GS-00F-090CA**  
**Contract Period: March 27, 2015 – March 26, 2020**

**ARC**

**Actuarial Research Corporation**  
**6928 Little River Turnpike, Suite E**  
**Annandale, VA 22003**  
**Telephone: (703) 941-7400**  
**Fax: (703) 941-3951**  
**<http://www.aresearch.com>**

**Business Size/Status: Small, Veteran-Owned**

**Pricelist current through modification Award dated March 27, 2015**

*Effective October 1, 2015, the Consolidated Schedule will become the Professional Services Schedule (PSS),  
with no changes to any terms and conditions found within this document*



Contract Holder

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## ABOUT ACTUARIAL RESEARCH CORPORATION

Over the course of 40 years, Actuarial Research Corporation (ARC) has established a national reputation for the high quality and reliability of its actuarial analysis and research studies, and for the development of new and innovative actuarial techniques. The results of its research activities provide advanced insights into the direction of the rapid evolution of health care financing methods. It is a unique organization encompassing actuarial and health research activities with staff members that are recognized experts in their fields.

ARC senior staff members have worked with a variety of federal entities, state agencies, as well as private clients on a variety of projects where they have provided expert actuarial analysis, policy evaluation and support services for health insurance issues. In addition to developing actuarial techniques and preparing cost estimates, ARC has provided technical assistance, implementation, monitoring, evaluation and operational support to many demonstration projects, with a special focus on the development and implementation of methods to determine program savings and performance-based financial incentives for the Medicare and Medicaid programs.

Our project experience and profile of health care financial studies include activities such as 1) analysis of the Medicare program, Medicaid program and other federal health insurance programs, 2) studies of national health policy issues, 3) studies related to state health financing reform, 4) analysis of TRICARE and other military health care programs, 5) analysis of mental health, alcohol, and drug abuse costs, 6) studies related to long-term care insurance, 7) evaluation of alternative approaches to the provision of Medicare and Medicaid services, and 8) prescription drug studies.

Actuarial Research Corporation has an extensive portfolio of government contract vehicles. They include Indefinite Delivery/Indefinite Quantity Task Order Contracts and a Multiple Award Schedule. ARC holds a GSA Consolidated Federal Supply Schedule that contains SINs awarded under C520-13: Complementary Financial Management Services, with expertise in actuarial and financial audit services and C874-1: Integrated Consulting Services, with expertise in research, management consulting and program evaluation/ advisory services. For more information, **please contact us at:**

**Actuarial Research Corporation**  
**Attn: Michele Windsor / GSA Orders**  
**6928 Little River Turnpike, Suite E, Annandale, VA 22003**  
**[mhw@aresearch.com](mailto:mhw@aresearch.com) / Phone: 703.941.7400 / Fax: 703.941.3951**

## GENERAL CONTRACT INFORMATION

1a. . Table of Awarded Special Item Numbers (SINs) - Please refer to page #[5](#) for detailed SIN descriptions

- **C520-13 / C520-13RC Complementary Financial Management Services**
- **C874-1 / C874-1RC Integrated Consulting Services**

*State & Local Purchasing Programs:*



- *Disaster Recovery Purchasing Program (RC) Section 833 of the National Defense Authorization Act allows state and local governments to purchase products and services to facilitate recovery from a major disaster. This includes advance and pre-positioning in preparation for a disaster.*
- *Federal Grants During Public Health Emergencies Section 319 of Public Health and Services Act.*

1b. Lowest Priced Model Number and Lowest Price: Please see page #[21](#) for our rates by SIN and labor category

1c. Labor Category Descriptions: FABS, page #[9](#) ; MOBIS page #[13](#)

2. Maximum Order: \$1,000,000  
*Note: Agencies may place, and Contractor may honor, orders exceeding this limit in accordance with FAR 8-404.*

3. Minimum Order: \$100

4. Geographic Coverage: Domestic: 50 States, DC and Puerto Rico

5. Point (s) of Production: Same as company address

6. Discount from List Price: Government net prices (discounts already deducted)

7. Quantity Discounts: Not Applicable

8. Prompt Payment Terms: Net 30 days

9a. Government Purchase Card *is* accepted at or below the micro – purchase threshold.

9b. Government Purchase Card *is not* accepted above the micro – purchase threshold.

10. Foreign Items: None

11a. Time of Delivery: To Be Negotiated with Ordering Agency

11b. Expedited Delivery: To Be Negotiated with Ordering Agency

11c. Overnight and 2-Day Delivery: To Be Negotiated with Ordering Agency

11d. Urgent Requirement: To Be Negotiated with Ordering Agency

12. F.O.B. Point(s): Destination

13a. Ordering Address: Actuarial Research Corporation  
Attn: Michele Windsor/GSA Orders  
6928 Little River Turnpike, Suite E  
Annandale, VA 22003

## GENERAL CONTRACT INFORMATION (CONTINUED)

- 13b. For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs), are found in Federal Acquisition Regulation (FAR) 8.405-3.
14. Payment Address: Actuarial Research Corporation  
Attn: Michele Windsor/Accounts Receivable  
6928 Little River Turnpike, Suite E  
Annandale, VA 22003
15. Warranty Provision: Not Applicable
16. Export Packing Charges: Not Applicable
17. Terms & Conditions of Government Purchase Card Acceptance: Contact Contract Administrator
18. Terms and conditions of rental, maintenance, and repair: Not Applicable
19. Terms and conditions of installation (if applicable): Not Applicable
20. Terms and conditions of repair parts indicating date of parts, price lists and any discounts from list prices: Not Applicable
- 20a. Terms and conditions for any other services (if applicable): Not Applicable
21. List of service and distribution points (if applicable): Not Applicable
22. List of participating dealers (if applicable): Not Applicable
23. Preventative maintenance (if applicable) Not Applicable
- 24a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants.): Not Applicable
- 24b. 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/](http://www.Section508.gov/) :
25. Data Universal Number System (DUNS) Number: 081052516
26. Actuarial Research Corporation *is* registered in System for Award Management (SAM).

## CONTRACT OVERVIEW

GSA awarded Actuarial Research Corporation a **GSA Consolidated (00CORP) Federal Supply Schedule, Contract No. GS-00F-090CA, on March 27, 2015**. GSA may exercise a total of up to three additional 5 year option periods. The contract allows for the placement of Firm Fixed Price or Time and Materials task orders using the labor categories and ceiling rates defined in the contract.

### CONTRACT ADMINISTRATOR

Michele Windsor  
Actuarial Research Corporation  
6928 Little River Turnpike, Suite E  
Annandale, VA 22003  
Telephone: (703) 941-7400 x10  
Fax Number: (703) 941-3951  
Email: [mhw@aresearch.com](mailto:mhw@aresearch.com)

### MARKETING AND TECHNICAL POINT OF CONTACT

Michele Windsor  
Actuarial Research Corporation  
6928 Little River Turnpike, Suite E  
Annandale, VA 22003  
Telephone: (703) 941-7400 x10  
Fax Number: (703) 941-3951  
Email: [mhw@aresearch.com](mailto:mhw@aresearch.com)

## CONTRACT USE

This contract is available for use by all federal government agencies, as a source for Financial and Business Solutions, for worldwide use. Executive agencies, other Federal agencies, mixed –ownership Government corporations, and the District of Columbia; government contractors authorized in writing by a Federal agency pursuant to 48 CFR 51.1; and other activities and organizations authorized by statute or regulation to use GSA as a source of supply may use this contract. Additionally, contractors are encouraged to accept orders received from activities within the Executive Branch of the Federal Government.

## CONTRACT SCOPE

The contractor shall provide all resources including personnel, management, supplies, services, materials, equipment, facilities and transportation necessary to provide a wide range of professional services as specified in each task order.

Services specified in a task order may be performed at the contractor's facilities or the ordering agencies' facilities. The government will determine the contractor's compensation by any of several different methods (to be specified at the task order level) e.g., a firm-fixed price for services with or without incentives, labor hours or time-and-material.

The Special Item Numbers (SINs) available under this contract provide services across the full life cycle of a project. When task orders are placed, they must identify the SIN or SINs under which the task is being executed. Actuarial Research Corporation has been awarded a contract by GSA to provide services under the following SINs:

- **SIN C520-13 / 520-13RC Complementary Financial Management Services**
- **SIN C874-1 / C874-1RC Integrated Consulting Services**

#### *State & Local Purchasing Programs:*

- DISAST**  
**RECOV**
- *Disaster Recovery Purchasing Program (RC) Section 833 of the National Defense Authorization Act allows state and local governments to purchase products and services to facilitate recovery from a major disaster. This includes advance and pre-positioning in preparation for a disaster.*
  - *Federal Grants During Public Health Emergencies Section 319 of Public Health and Services Act.*

A full description of each SIN and examples of the types of work covered by the SIN are provided below.

## **SPECIAL ITEM NUMBER (SIN) DESCRIPTIONS**

### **SIN C520-13 – COMPLEMENTARY FINANCIAL MANAGEMENT SERVICES**

Assess and improve financial management systems, financial reporting and analysis, strategic financial planning, financial policy formulation and development. Devise and implement performance measures, conduct special cost studies, perform actuarial services, perform economic and regulatory analysis, assist with financial quality assurance efforts, perform benchmarking. This may include but is not limited to the following:

- Assess and improve financial management systems
- Conduct A-127 system compliance reviews
- Assist with implementation of corrective actions
- Document systems
- Identify systems requirements
- Plan and develop systems
- Assist in meeting agency financial management system requirements
- Assess and improve financial reporting and analysis
- Develop new reporting formats and pro-forma financial reports
- Assist in improving and streamlining reporting and analysis processes
- Perform cost-benefit or other special financial analyses
- Assist with the requirements of the Government Performance & Results Act
- Assist with devising and implementing performance measures and related processes and systems
- Assist with strategic and operational financial planning
- Resolve audit recommendations
- Assist in managerial cost accounting
- Assist in financial policy formulation and development
- Perform economic and regulatory analyses
  - develop methods for analyzing costs, benefits and impacts of regulations and policies
  - collect data and prepare Information Collection Requests for approval by OMB
  - conduct exposure and risk analyses
  - develop, modify or apply risk characterization models to analyze and evaluate polices, programs and regulations
- Perform actuarial services and/or actuarial data analysis services
  - collection, analysis, editing, calibration and data entry of Employee Benefit Plan information
  - conduct updates of a full actuarial valuation pension plan database, program major upgrades or significant new modeling capabilities
  - perform quantitative analysis of covered pension plans to identify plans that are potentially noncompliant or under-funded
- Assist with quality assurance efforts

### **SIN C874-1 – INTEGRATED CONSULTING SERVICES**

Contractors shall provide expert advice and assistance in support of an agency's mission-oriented business functions. Services covered by this SIN include:

- Management or strategy consulting, including research, evaluations, studies, analyses, scenarios/simulations, reports, business policy and regulation development assistance, strategy formulation, and expert witness services
- Facilitation and related decision support services
- Survey services, using a variety of methodologies, including survey planning, design, and development; survey administration; data validation and analysis; reporting, and stakeholder briefings
- Advisory and assistance services in accordance with FAR 37.203

NOTE: Consulting services where the preponderance of work is specifically covered under other GSA Schedules are not permitted under this SIN; please refer to the Scope of Work in Part I of the MOBIS solicitation for further information.

SERVICES NOT INCLUDED

Note: The acquisition of professional services covered by other GSA Schedules is permitted as long as the services are incidental to the overall service requirement and are directly linked to the successful performance of the task. This determination shall be made by the responsible ordering agency Contracting Officer; it is the responsibility of both the contractor and the ordering agency Contracting Officer to ensure that services required or performed are within the scope of the MOBIS Schedule and the awarded contract.

Services that are not authorized for purchase under a MOBIS task order are services where the primary purpose or the preponderance of work performed is specifically covered by another GSA Schedule, such as: financial services covered by GSA Schedule 520; engineering services covered by GSA Schedule 871; IT services covered by GSA Schedule 70; advertising and marketing services covered by GSA Schedule 541; human resources services covered by GSA Schedule 738X; logistics services covered by GSA Schedule 874V; security services covered by GSA Schedule 84; transportation services covered by GSA Schedule 48; travel services covered by GSA Schedule 599; environmental services covered by GSA Schedule 899; and language services covered by GSA Schedule 738II.

Note: Personal Services Contracts as defined in FAR 37.101 and FAR 37.104 are strictly prohibited. Agencies are prohibited from utilizing service contracts to augment government staff. A contractor is equally prohibited from knowingly offering to supplement government staff by engaging in a personal services contract/task order.

Note: Architect-Engineering (A/E) Services as that term is defined in FAR 36.601-4 are excluded from the Schedules Program.

Note: Inherently Governmental services as identified in FAR 7.503 or by the ordering agency are prohibited under MOBIS



**INSTRUCTIONS FOR PLACING ORDERS FOR SERVICES BASED ON  
GSA SCHEDULE HOURLY RATES ([FAR 8.405-2](#))**

GSA provides a streamlined, efficient process for ordering the services you need. GSA has already determined that Actuarial Research Services (ARC) meets the technical requirements and that our prices offered are fair and reasonable. Agencies may use written orders; facsimile orders, credit card orders, blanket purchase agreement orders or individual purchase orders under this contract.

If it is determined that your agency needs an outside source to provide Consolidated services, follow these simple steps:

<b>Orders under the Micro-Purchase Threshold (\$3,000)</b>
<ul style="list-style-type: none"> <li>Select the contractor best suited for your needs and place the order.</li> </ul>
<b>Orders in-between the Micro-Purchase Threshold (\$3,000) and the Simplified Acquisition Threshold (\$150,000)</b>
<ul style="list-style-type: none"> <li>Prepare a SOW or Performance Work Statement (PWS) in accordance with FAR 8.405-2(b).</li> <li>Prepare and send the RFQ (including SOW and evaluation criteria) to at least <b>three</b> GSA Schedule contractors.</li> <li>Evaluate, then make a "Best Value" determination.</li> </ul> <p><b>Note:</b> The ordering activity should request GSA Schedule contractors to submit firm-fixed prices to perform the services identified in the SOW.</p>
<b>Orders over the Simplified Acquisition Threshold (\$150,000)</b>
<ul style="list-style-type: none"> <li>Prepare the RFQ (including the SOW and evaluation criteria) and post on eBuy to afford all Schedule contractors the opportunity to respond, or provide the RFQ to as many Schedule contractors as practicable, consistent with market research, to reasonably ensure that quotes are received from at least <b>three</b> contractors.</li> <li>Seek price reductions.</li> <li>Evaluate all responses and place the order, or establish the BPA with the GSA Schedule contractor that represents the best value (refer to FAR 8.405-2(d)).</li> </ul> <p><b>Note:</b> The ordering activity should request GSA Schedule contractors to submit firm-fixed prices to perform the services identified in the SOW.</p>

<b>Developing a Statement of Work (SOW) or Performance Work Statement (PWS)</b>	<b>Preparing a Request for Quote (RFQ)</b>
<p>In the SOW, include the following information:</p> <ul style="list-style-type: none"> <li>Work to be performed,</li> <li>Location of work,</li> <li>Period of performance;</li> <li>Deliverable schedule, and</li> <li>Special standards and any special requirements, where applicable</li> </ul>	<ul style="list-style-type: none"> <li>Include the SOW and evaluation criteria;</li> <li>Request fixed price, ceiling price, or, if not possible, labor hour or time and materials order;</li> <li>If preferred, request a performance plan from contractors and information on past experience; and include information on the basis for selection.</li> <li>May be posted on GSA’s electronic RFQ system, e-Buy</li> </ul>

For more information related to ordering services:

- Go to <http://www.gsa.gov/schedules-ordering> and click “Ordering Information”.
- Also see summary guidelines in the [Multiple Award Schedule \(MAS\) Desk Reference Guide, Ordering Procedures](#).

## BLANKET PURCHASE AGREEMENT

Ordering activities may establish BPAs under any schedule contract to fill repetitive needs for supplies or services. BPAs may be established with one or more schedule contractors. The number of BPAs to be established is within the discretion of the ordering activity establishing the BPAs and should be based on a strategy that is expected to maximize the effectiveness of the BPA(s). In determining how many BPAs to establish, consider:

- The scope and complexity of the requirement(s);
- The need to periodically compare multiple technical approaches or prices;
- The administrative costs of BPAs; and
- The technical qualifications of the schedule contractor(s).

Establishment of a single BPA, or multiple BPAs, shall be made using the same procedures outlined in 8.405-1 or 8.405-2. BPAs shall address the frequency of ordering, invoicing, discounts, requirements (*e.g.* estimated quantities, work to be performed), delivery locations, and time.

When establishing multiple BPAs, the ordering activity shall specify the procedures for placing orders under the BPAs.

Establishment of a multi-agency BPA against a Federal Supply Schedule contract is permitted if the multi-agency BPA identifies the participating agencies and their estimated requirements at the time the BPA is established.

Ordering from BPAs:

Single BPA. If the ordering activity establishes one BPA, authorized users may place the order directly under the established BPA when the need for the supply or service arises.

Multiple BPAs. If the ordering activity establishes multiple BPAs, before placing an order exceeding the micro-purchase threshold, the ordering activity shall:

- Forward the requirement, or statement of work and the evaluation criteria, to an appropriate number of BPA holders, as established in the BPA ordering procedures; and
- Evaluate the responses received, make a best value determination (see 8.404(d)), and place the order with the BPA holder that represents the best value.

BPAs for hourly rate services. If the BPA is for hourly rate services, the ordering activity shall develop a statement of work for requirements covered by the BPA. All orders under the BPA shall specify a price for the performance of the tasks identified in the statement of work.

Duration of BPAs. BPAs generally should not exceed five years in length, but may do so to meet program requirements. Contractors may be awarded BPAs that extend beyond the current term of their GSA Schedule contract, so long as there are option periods in their GSA Schedule contract that, if exercised, will cover the BPA's period of performance.

Review of BPAs:

The ordering activity that established the BPA shall review it at least once a year to determine whether:

- The schedule contract, upon which the BPA was established, is still in effect;
- The BPA still represents the best value (see 8.404(d)); and
- Estimated quantities/amounts have been exceeded and additional price reductions can be obtained.

The ordering activity shall document the results of its review.

## LABOR CATEGORY DESCRIPTIONS – AWARDED UNDER SIN C520-13/13RC

### Finance Modelers

#### **Experience Substitutions:**

High School Diploma + 4 years additional experience	Equals	Bachelors Degree
Bachelors Degree + 2 years additional experience	Equals	Masters Degree
Masters Degree + 3 years additional experience	Equals	Ph.D

#### **Education Substitutions:**

A Ph.D may be substituted for 3 years of required experience with a Masters Degree or 4 years with a Bachelors Degree
A Masters Degree may be substituted for 2 years of required experience with a Bachelors degree.
A Bachelors Degree may be substituted for 4 years of required experience with a High School Diploma.

### Actuarial Categories

#### **Experience Substitutions:**

ASA with 4 years of additional applied actuarial experience	Equals	FSA
Advanced degree (Ph.D., MA, MBA, MPH or MS) and 8 years of applied actuarial experience	Equals	FSA
BS or BA in quantitative field, with 2 years of additional applied actuarial experience	Equal	ASA

#### **Education Substitutions:**

An FSA may be substituted for 4 years applied actuarial experience with an ASA
An FSA may be substituted for 8 years of applied actuarial experience with an advanced degree (Ph.D., MA, MBA, MPH or MS)
An FSA may be substituted for 2 years of applied actuarial experience and BS or BA

### Researchers

#### **Experience Substitutions:**

High School Diploma + 4 years additional experience	Equals	Bachelors Degree
Bachelors Degree + 2 years additional experience	Equals	Masters Degree
Masters Degree + 3 years additional experience	Equals	Ph.D

#### **Education Substitutions:**

A Ph.D may be substituted for 3 years of required experience with a Masters Degree or 4 years with a Bachelors Degree
A Masters Degree may be substituted for 2 years of required experience with a Bachelors degree.
A Bachelors Degree may be substituted for 4 years of required experience with a High School Diploma.

<b>Expert Financial Modeler</b>
<b>Minimum Experience:</b> 20 years experience.
<b>Functional Responsibilities:</b> Finance or micro simulation modeler and team leader with extensive interaction with clients. Recognized as an expert in financial modeling. Publishes in technical journals or makes presentations to technical organizations.
<b>Minimum Educational Requirements:</b> Masters or equivalent

<b>Financial Modeler II</b>
<b>Minimum Experience:</b> 8 years experience.
<b>Functional Responsibilities:</b> Finance or micro simulation modeler with significant client contact and interaction, and substantial financial modeling contributions to projects.
<b>Minimum Educational Requirements:</b> Masters or equivalent

<b>Financial Modeler III</b>
<b>Minimum Experience:</b> 6 years experience.
<b>Functional Responsibilities:</b> Finance or micro simulation modeler with client contact and interaction, and financial modeling contributions to projects.
<b>Minimum Educational Requirements:</b> Masters or equivalent

<b>Financial Modeler V</b>
<b>Minimum Experience:</b> 2 years experience.
<b>Functional Responsibilities:</b> Finance or micro simulation modeler with limited client interactions, and financial modeling contributions to projects.
<b>Minimum Educational Requirements:</b> Masters or equivalent

<b>National Expert Actuary</b>
<b>Minimum Experience:</b> 18 years experience.
<b>Functional Responsibilities:</b> Actuary with extensive specialized experience and recognized as an expert in actuarial matters. Provides articles for technical organizations, serves on actuarial committees, or authors technical books. Team leader with extensive interaction with clients.
<b>Minimum Educational Requirements:</b> FSA or equivalent.

<b>Expert Actuary I</b>
<b>Minimum Experience:</b> 18 years experience.
<b>Functional Responsibilities:</b> Actuary with extensive specialized experience and recognized as an expert in actuarial matters. Serves on actuarial committees or makes presentations to actuarial organizations. Team leader with extensive interaction with clients.
<b>Minimum Educational Requirements:</b> FSA or equivalent.

<b>Expert Actuary III</b>
<b>Minimum Experience:</b> 14 years experience.
<b>Functional Responsibilities:</b> Actuary with extensive specialized experience and recognized as an expert in actuarial matters. Serves on actuarial committees or makes presentations to actuarial organizations. Team leader with extensive interaction with clients.
<b>Minimum Educational Requirements:</b> FSA or equivalent.

<b>Senior Actuary I</b>
<b>Minimum Experience:</b> 10 years experience.
<b>Functional Responsibilities:</b> Actuary and team leader with substantial client contacts. Provides actuarial contributions to projects or professional literature. Participation in national professional actuarial meetings.
<b>Minimum Educational Requirements:</b> FSA or equivalent.

<b>Senior Actuary II</b>
<b>Minimum Experience:</b> 8 years experience.
<b>Functional Responsibilities:</b> Actuary and team leader with substantial client contacts. Provides actuarial contributions to projects or professional literature. Participation in national professional actuarial meetings.
<b>Minimum Educational Requirements:</b> FSA or equivalent.

<b>Senior Actuary III</b>
<b>Minimum Experience:</b> 6 years experience.
<b>Functional Responsibilities:</b> Actuary and team leader with substantial client interaction. Provides actuarial contributions to projects and participation in actuarial seminars/meetings.
<b>Minimum Educational Requirements:</b> FSA or equivalent.

<b>Senior Actuary IV</b>
<b>Minimum Experience:</b> 4 years experience.
<b>Functional Responsibilities:</b> Actuary and team leader with substantial client interaction. Provides actuarial contributions to projects and participation in actuarial seminars/meetings.
<b>Minimum Educational Requirements:</b> FSA or equivalent.

<b>Associate Actuary II</b>
<b>Minimum Experience:</b> 6 years experience
<b>Functional Responsibilities:</b> Significant client contact and interaction, substantial actuarial contributions to client presentations and listed author of client reports. Participation in professional actuarial meetings.
<b>Minimum Educational Requirements:</b> ASA or equivalent.

<b>Associate Actuary III</b>
<b>Minimum Experience:</b> 4 years experience
<b>Functional Responsibilities:</b> Significant client contact and interaction, substantial actuarial contributions to client presentations and listed author of client reports. Participation in professional actuarial meetings.
<b>Minimum Educational Requirements:</b> ASA or equivalent.

<b>Associate Actuary IV</b>
<b>Minimum Experience:</b> 2 years experience
<b>Functional Responsibilities:</b> Significant client contact and interaction, substantial actuarial contributions to client presentations and listed author of client reports. Participation in professional actuarial meetings.
<b>Minimum Educational Requirements:</b> ASA or equivalent.

<b>Assistant Actuary II</b>
<b>Minimum Experience:</b> 6 years experience
<b>Functional Responsibilities:</b> Familiarity with actuarial concepts but has not taken actuarial exams. Provides assistance to actuaries.
<b>Minimum Educational Requirements:</b> BA or BS in quantitative field

<b>Assistant Actuary IV</b>
<b>Minimum Experience:</b> 2 years experience
<b>Functional Responsibilities:</b> Familiarity with actuarial concepts but has not taken actuarial exams. Provides assistance to actuaries.
<b>Minimum Educational Requirements:</b> BA or BS in quantitative field

<b>Assistant Actuary V</b>
<b>Minimum Experience:</b> 0 years experience
<b>Functional Responsibilities:</b> Familiarity with actuarial concepts but has not taken actuarial exams. Provides assistance to actuaries.
<b>Minimum Educational Requirements:</b> BA or BS in quantitative field

<b>Expert Researcher I</b>
<b>Minimum Experience:</b> 14 years experience.
<b>Functional Responsibilities:</b> Health services researcher and team leader with extensive interaction with clients. Provides health policy advice on a national and state level, and is recognized as a health services research expert. Publishes in technical literature or participates in health service forums.
<b>Minimum Educational Requirements:</b> Masters or equivalent.

<b>Expert Researcher II</b>
<b>Minimum Experience:</b> 12 years experience.
<b>Functional Responsibilities:</b> Health services researcher and team leader with extensive interaction with clients. Provides health policy advice on a national and state level, and is recognized as a health services research expert. Publishes in technical literature or participates in health service forums.
<b>Minimum Educational Requirements:</b> Masters or equivalent.

<b>Researcher III</b>
<b>Minimum Experience:</b> 4 years experience.
<b>Functional Responsibilities:</b> Health services researcher with limited client interactions, but provides significant health services research contributions to projects.
<b>Minimum Educational Requirements:</b> BA or BS degree

<b>Junior Researcher I</b>
<b>Minimum Experience:</b> 0 years experience.
<b>Functional Responsibilities:</b> Provides assistance to health service researchers and has limited familiarity with health services research concepts. Demonstrated ability to work independently.
<b>Minimum Educational Requirements:</b> BA or BS degree

<b>Junior Researcher III</b>
<b>Minimum Experience:</b> 2 years experience.
<b>Functional Responsibilities:</b> Provides assistance to health service researchers and has limited familiarity with health services research concepts
<b>Minimum Educational Requirements:</b> AA degree

<b>Junior Researcher IV</b>
<b>Minimum Experience:</b> 0 years experience.
<b>Functional Responsibilities:</b> Provides assistance to health service researchers and has limited familiarity with health services research concepts
<b>Minimum Educational Requirements:</b> AA degree

<b>Project Coordinator</b>
<b>Minimum Experience:</b> 4 years experience.
<b>Functional Responsibilities:</b> Directs activities related to contract administration. Researches and recommends solutions to contractual issues.
<b>Minimum Educational Requirements:</b> BA or BS degree

## LABOR CATEGORY DESCRIPTIONS – AWARDED UNDER SIN C874-1/RC

### Educational Requirement Substitutions

Applied, relevant experience can be substituted for educational requirements as follows:

#### Actuarial Tract

**F.S.A equivalents (i.e., the following can be substituted for F.S.A.):**

- (1) A.S.A, 5 years of additional applied actuarial experience for each missing actuarial examination and either (i) recognition as an actuary by a governmental or professional actuarial body or (ii) relevant publications or invited presentations equivalent to Fellowship requirements.
- (2) Advanced degree (PhD, MA, MBA or MPH) in a quantitative field, 20 years of applied actuarial experience, publications comparable to Fellowship scholarly requirements and recognition as an actuary by a government entity, Court or national actuarial body.

**A.S.A. equivalents:**

- (1) Bachelors degree in quantitative field, 3 years of additional applied actuarial experience for each missing actuarial examination and either (i) recognition as an actuary by a governmental or professional actuarial body or (ii) relevant publications, reports under federal contracts, invited presentations or other actuarial accomplishments that demonstrate actuarial capacity comparable to Associate requirements.
- (2) Degree in a quantitative field, 15 years of applied actuarial experience and either publications or presentations or other recognition as an actuary by a government entity, Court or national actuarial body.

**Assistant Actuary equivalents:** An MA in a quantitative field counts as a year and actuarial examinations *MFE* and *MLC* each count as two years of applied actuarial experience.

**Junior Actuary equivalents:** Actuarial examinations *P* and *FM* and an MA in a quantitative field count as a year of applied actuarial experience. Actuarial examinations *MFE* and *MLC* each count as two years of applied actuarial experience.

Notes:

\*F.S.A.: Fellow of Society of Actuaries

\*A.S.A.: Associate of Society of Actuaries

#### Health Services Research Track

**PhD equivalent:** Masters Degree in quantitative field, 5 years additional applied experience and publications in the health services research literature equivalent to a PhD thesis may be substituted for PhD.

**Masters degree equivalent:** Bachelors degree in quantitative field, 3 years additional applied experience and publications in the health services research literature or presentations to professional bodies equivalent to a Masters thesis may be substituted for a Masters Degree.

MPH or MA in Economics or Statistics may be substituted for two years of applied health services research experience.

Labor Category Title	Minimum Experience	Minimum Educational Requirements	Functional Responsibilities
<b>Nationally Recognized Expert Actuary</b>	25 years experience	Bachelors degree and FSA certification or equivalent	<p>Provides actuarial and technical expertise with extensive client interaction. Acts as team leader, project manager or principal investigator. To establish status as a Nationally Recognized Expert Actuary, one of the following additional functional responsibilities must be met:</p> <ol style="list-style-type: none"> <li>1) being invited to provide testimony to the Congress,</li> <li>2) appointment to a U.S. technical commission or Advisory Board,</li> <li>3) authoring a book devoted to national issues,</li> <li>4) serving as an officer or committee chair of a national actuarial organization</li> <li>5) being the primary author of a monograph, Legislative Brief or Practice Note of a national actuarial organization.</li> <li>6) performing an activity that clearly establishes Nationally Recognized Expert actuarial expertise.</li> </ol>
<b>Recognized Expert Actuary</b>	21 years experience	Bachelors degree and FSA certification or equivalent	<p>Provides actuarial and technical expertise with extensive client interaction. Acts as team leader, project manager or principal investigator. To establish status as a Recognized Expert Actuary, one of the following functional responsibilities must be met:</p> <ol style="list-style-type: none"> <li>1) providing testimony before a legislative body, government board, government commission, or advisory counsel, etc.</li> <li>2) serving on a committee of a national actuarial organization;</li> <li>3) making an invited presentation before a national actuarial organization</li> <li>4) performing an activity that clearly establishes Recognized Expert actuarial expertise</li> </ol>



Labor Category Title	Minimum Experience	Minimum Educational Requirements	Functional Responsibilities
<b>Senior Expert Actuary</b>	20 years experience	Bachelors degree and FSA certification or equivalent	<p>Provides actuarial and technical expertise, with substantial client interaction. Acts as team leader, project manager or principal investigator. To establish status as a Senior Expert Actuary, one of the following functional responsibilities must be met:</p> <ol style="list-style-type: none"> <li>1) providing testimony before a Federal Court or Administrative Appeals proceeding;</li> <li>2) serving as an officer or chairman of an actuarial organization</li> <li>3) authoring a book or article on an actuarial subject in a professional journal, etc..</li> <li>4) performing an activity that clearly establishes Senior Expert actuarial expertise</li> </ol>
<b>Associate Expert Actuary</b>	15 years experience	Bachelors degree and ASA certification or equivalent	<p>Provides actuarial and technical expertise, with substantial client interaction. Acts as team leader, project manager or principal investigator. To establish status as an Associate Expert Actuary, one of the following additional functional responsibilities must be met:</p> <ol style="list-style-type: none"> <li>1) being appointed to a Federal Contract Evaluation team or a Technical Advisory Panel</li> <li>2) being named as a key technical employee in a federal contract,</li> <li>3) contributing to professional actuarial literature</li> <li>4) contributing to the technical discussion of an actuarial organization.</li> <li>5) performing an activity that clearly establishes Associate Expert actuarial expertise</li> </ol>

Labor Category Title	Minimum Experience	Minimum Educational Requirements	Functional Responsibilities
<b>Expert Actuary</b>	11 years experience	Bachelors degree and ASA certification or equivalent	<p>Provides actuarial and technical expertise, with substantial client interaction. Provides major actuarial contributions to technical reports and is a listed author of client reports. To establish status as an Expert Actuary, one of the following functional responsibilities must be met:</p> <ol style="list-style-type: none"> <li>1) being appointed to a Federal Contract Evaluation team or a Technical Advisory Panel</li> <li>2) being named as a key technical employee in a federal contract</li> <li>3) contributing to the professional actuarial literature</li> <li>4) contributing to the technical discussion at an actuarial organization meeting.</li> <li>5) performing an activity that clearly establishes Expert actuarial expertise</li> </ol>
<b>Senior Actuary 3</b>	10 years experience	Bachelors degree and FSA certification or equivalent	Provides actuarial and technical services, with substantial client interaction. Provides major actuarial contributions to technical reports and is listed author of client reports. Participates in national professional actuarial meetings including contributions to technical discussions.
<b>Associate Actuary 5</b>	20 years experience	Bachelors degree and ASA certification or equivalent	Provides actuarial and technical services, with significant client contact and interaction. Provides substantial actuarial contributions to client presentations and is listed author of client reports. Participates in professional actuarial meetings.
<b>Associate Actuary 4</b>	15 years experience	Bachelors degree and ASA certification or equivalent	Provides actuarial and technical services with significant client contact and interaction. Provides substantial actuarial contributions to client presentations and is listed author of client reports. Participates in professional actuarial meetings.
<b>Assistant Actuary 2</b>	6 years experience or equivalent and passed at least 3 SOA Exams	Bachelors degree in quantitative field and 3 SOA exams or equivalent	Provides actuarial and technical assistance under the direction of an Actuary, with limited client interaction. Provides significant contributions to client presentations and reports. Participant in professional actuarial or technical society meetings.
<b>Assistant Actuary 1</b>	3 years experience or equivalent and passed at least 3 SOA Exams	Bachelors degree in quantitative field and 3 SOA examinations or equivalent	Provides actuarial and technical assistance under the direction of an Actuary, with limited client interaction. Provides significant contributions to client presentations and reports. Participant in professional actuarial or technical society meetings.

Labor Category Title	Minimum Experience	Minimum Educational Requirements	Functional Responsibilities
<b>Junior Actuary 2</b>	4 years experience or equivalent and has attempted at least 1 SOA Exam	Bachelors degree in quantitative field	Provides actuarial and technical assistance under the supervision of an Actuary. Provides contributions to actuarial client presentations and reports.
<b>Nationally Recognized Expert Health Services Research Professional</b>	25 years experience	PhD or equivalent	<p>Provides technical expertise with extensive interaction with clients. Acts as team leader, project manager or principal investigator. To establish status as a Nationally Recognized Expert Health Services Research Professional, one of the following functional responsibilities must be met:</p> <ol style="list-style-type: none"> <li>1) providing invited testimony to the Congress</li> <li>2) being appointed to a U.S. technical commissions or Advisory Board</li> <li>3) authoring a book devoted to national issues or other publication that establish the author has a national reputation in the field</li> <li>4) service as an officer, committee chair of a national technical organization</li> <li>5) being a primary author of a publication or article to a national technical organization.</li> <li>6) performing an activity that clearly establishes Nationally Recognized health services research expertise</li> </ol>

Labor Category Title	Minimum Experience	Minimum Educational Requirements	Functional Responsibilities
<b>Recognized Expert Health Services Research Professional</b>	21 years experience	PhD or equivalent	<p>Provides technical expertise with extensive interaction with clients. Acts as a team leader, project manager or principal investigator. To establish status as a Recognized Expert Health Services Research Professional, one of the following functional responsibilities must be met:</p> <ol style="list-style-type: none"> <li>1) authoring a publication in a national technical journal</li> <li>2) providing testimony before a legislative body, official government board, commission, advisory council, etc.,</li> <li>3) serving on a committee for a national technical organizations</li> <li>4) making an invited presentation to a national technical organization,</li> <li>5) performing an activity that clearly establishes Recognized health services research expertise</li> </ol>
<b>Senior Expert Health Services Research Professional</b>	20 years experience	PhD or equivalent	<p>Provides technical expertise with substantial client contact. Acts as a team leader, project manager or principal investigator. To establish status as a Senior Expert Health Services Research Professional, one of the following functional responsibilities must be met:</p> <ol style="list-style-type: none"> <li>1) providing expert testimony before a Federal Court or Administrative Appeals proceeding</li> <li>2) serving as an officer or chairman of a professional technical organization</li> <li>3) authoring a relevant book or article in a professional journal</li> <li>4) Performing an activity that clearly establishes Senior health services research expertise</li> </ol>

Labor Category Title	Minimum Experience	Minimum Educational Requirements	Functional Responsibilities
<b>Expert Health Services Research Professional</b>	11 years experience	Masters degree or equivalent	<p>Provides technical expertise with substantial client interaction. Provides major relevant contributions to technical reports and is listed author of client reports.</p> <p>To establish status as an Expert Health Services Research Professional, one of the following functional responsibilities must be met:</p> <ol style="list-style-type: none"> <li>1) being appointed to a Federal Contract Evaluation team or Technical Advisory Panel</li> <li>2) being named a key technical employee in a federal contract</li> <li>3) contributing to professional literature</li> <li>4) performing an activity that clearly establishes health services research expertise</li> </ol>
<b>Senior Health Services Research Professional 2</b>	10 years experience	Masters degree or equivalent	<p>Provides technical services with substantial client interaction. Provides major relevant contributions to technical reports and is listed author of client reports. Participates in professional technical society meetings by contributing to technical discussions.</p>
<b>Associate Health Services Research Professional 2</b>	5 years experience	Masters degree or equivalent	<p>Provides technical services with significant client contact and interaction. Provides relevant contributions to client presentations and is listed author of client reports. Participates in professional technical society meetings.</p>
<b>Assistant Health Services Research Professional 2</b>	6 years experience	Bachelors degree	<p>Provides technical services under the direction of Health Services Research Professional or Actuary, with limited client interaction. Provides contributions to relevant presentations to clients and client report. Participates in professional technical society meetings.</p>
<b>Assistant Health Services Research Professional 1</b>	4 years experience	Bachelors degree	<p>Provides technical services under the direction of a Health Services Research Professional or Actuary, with limited client interaction. Provides contributions to relevant presentations to clients and client reports. Participates in professional technical society meetings.</p>
<b>Junior Health Services Research Professional 2</b>	3 years experience	Bachelors degree	<p>Provides technical assistance under the supervision of a Health Services Research Professional or Actuary, with very limited client interaction. Makes contributions to presentations to clients and client reports, Participates in professional technical society meetings.</p>

Labor Category Title	Minimum Experience	Minimum Educational Requirements	Functional Responsibilities
<b>Senior Financial Assistant</b>	3 years experience	Bachelors degree	Bookkeeping, accounting and other financial support services, bank account & investment account maintenance, high level report production plus some administrative duties.
<b>Contract Administrator</b>	4 years experience	Bachelors degree	Directs all activities related to contract administration, to include reporting, budgeting and cost control. Researches and recommends solutions to contractual issues.

**HOURLY RATES FOR SERVICES BY SIN AND LABOR CATEGORY**



	SIN(s)	GSA Labor Category	Base Period				
			Year 1	Year 2	Year 3	Year 4	Year 5
			3/27/15 - 3/26/16	3/27/16 - 3/26/17	3/27/17 - 3/26/18	3/27/18 - 3/26/19	3/27/19 - 3/26/20
1	520 13	Expert Financial Modeler	\$387.59	\$396.12	\$404.83	\$413.74	\$422.84
2	520 13	Financial Modeler II	\$224.71	\$229.65	\$234.71	\$239.87	\$245.15
3	520 13	Financial Modeler III	\$216.65	\$221.42	\$226.29	\$231.27	\$236.35
4	520 13	Financial Modeler V	\$178.47	\$182.40	\$186.41	\$190.51	\$194.70
5	520 13	National Expert Actuary	\$426.59	\$435.97	\$445.57	\$455.37	\$465.39
6	520 13	Expert Actuary I	\$384.03	\$392.48	\$401.11	\$409.94	\$418.96
7	520 13	Expert Actuary III	\$335.60	\$342.98	\$350.53	\$358.24	\$366.12
8	520 13	Senior Actuary I	\$301.05	\$307.67	\$314.44	\$321.36	\$328.43
9	520 13	Senior Actuary II	\$285.66	\$291.94	\$298.37	\$304.93	\$311.64
10	520 13	Senior Actuary III	\$274.23	\$280.26	\$286.43	\$292.73	\$299.17
11	520 13	Senior Actuary IV	\$263.01	\$268.80	\$274.71	\$280.75	\$286.93
12	520 13	Associate Actuary II	\$143.07	\$146.22	\$149.43	\$152.72	\$156.08
13	520 13	Associate Actuary III	\$134.07	\$137.02	\$140.03	\$143.11	\$146.26
14	520 13	Associate Actuary IV	\$124.66	\$127.40	\$130.21	\$133.07	\$136.00
15	520 13	Assistant Actuary II	\$115.79	\$118.34	\$120.94	\$123.60	\$126.32
16	520 13	Assistant Actuary IV	\$108.28	\$110.66	\$113.10	\$115.58	\$118.13
17	520 13	Assistant Actuary V	\$103.90	\$106.19	\$108.52	\$110.91	\$113.35
18	520 13	Expert Researcher I	\$338.13	\$345.57	\$353.17	\$360.94	\$368.88
19	520 13	Expert Researcher II	\$326.70	\$333.89	\$341.23	\$348.74	\$356.41
20	520 13	Researcher III	\$136.31	\$139.31	\$142.37	\$145.51	\$148.71
21	520 13	Junior Researcher I	\$100.37	\$102.58	\$104.83	\$107.14	\$109.50
22	520 13	Junior Researcher III	\$85.78	\$87.67	\$89.60	\$91.57	\$93.58
23	520 13	Junior Researcher IV	\$79.31	\$81.05	\$82.84	\$84.66	\$86.52
24	520 13	Project Coordinator	\$153.96	\$157.35	\$160.81	\$164.35	\$167.96
25	874-1	Nationally Recognized Expert Actuary	\$354.91	\$362.72	\$370.70	\$378.85	\$387.19
26	874-1	Recognized Expert Actuary	\$319.41	\$326.44	\$333.62	\$340.96	\$348.46
27	874-1	Senior Expert Actuary	\$311.39	\$318.24	\$325.24	\$332.40	\$339.71
28	874-1	Associate Expert Actuary	\$304.11	\$310.80	\$317.64	\$324.63	\$331.77
29	874-1	Expert Actuary	\$264.01	\$269.82	\$275.75	\$281.82	\$288.02
30	874-1	Senior Actuary 3	\$245.35	\$250.75	\$256.26	\$261.90	\$267.66
31	874-1	Associate Actuary 5	\$136.17	\$139.17	\$142.23	\$145.36	\$148.55

	SIN(s)	GSA Labor Category	Base Period				
			Year 1	Year 2	Year 3	Year 4	Year 5
			3/27/15 - 3/26/16	3/27/16 - 3/26/17	3/27/17 - 3/26/18	3/27/18 - 3/26/19	3/27/19 - 3/26/20
32	874-1	Associate Actuary 4	\$124.26	\$126.99	\$129.79	\$132.64	\$135.56
33	874-1	Assistant Actuary 2	\$132.23	\$135.14	\$138.11	\$141.15	\$144.26
34	874-1	Assistant Actuary 1	\$115.68	\$118.22	\$120.83	\$123.48	\$126.20
35	874-1	Junior Actuary 2	\$92.30	\$94.33	\$96.41	\$98.53	\$100.69
36	874-1	Nationally Recognized Expert Health Services Research Professional	\$354.91	\$362.72	\$370.70	\$378.85	\$387.19
37	874-1	Recognized Expert Health Services Research Professional	\$319.41	\$326.44	\$333.62	\$340.96	\$348.46
38	874-1	Senior Expert Health Services Research Professional	\$307.75	\$314.52	\$321.44	\$328.51	\$335.74
39	874-1	Expert Health Services Research Professional	\$264.01	\$269.82	\$275.75	\$281.82	\$288.02
40	874-1	Senior Health Services Research Professional 2	\$245.35	\$250.75	\$256.26	\$261.90	\$267.66
41	874-1	Associate Health Services Research Professional 2	\$164.94	\$168.57	\$172.28	\$176.07	\$179.94
42	874-1	Assistant Health Services Research Professional 2	\$127.58	\$130.39	\$133.26	\$136.19	\$139.18
43	874-1	Assistant Health Services Research Professional 1	\$127.19	\$129.99	\$132.85	\$135.77	\$138.76
44	874-1	Junior Health Services Research Professional 2	\$92.30	\$94.33	\$96.41	\$98.53	\$100.69
45	874-1	Senior Financial Assistant	\$64.86	\$66.29	\$67.75	\$69.24	\$70.76
46	874-1	Contract Administrator	\$142.28	\$145.41	\$148.61	\$151.88	\$155.22

The Service Contract Act (SCA) is applicable to this contract as it applies to the entire Consolidated Schedule and all services provided. While no specific labor categories have been identified as being subject to SCA due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29 CFR 541.300), this contract still maintains the provisions and protections for SCA eligible labor categories. If and/or when the contractor adds SCA labor categories / employees to the contract through the modification process, the contractor must inform the Contracting Officer and establish a SCA matrix identifying the GSA labor category titles, the occupational code, SCA labor category titles and the applicable WD number. Failure to do so may result in cancellation of the contract.