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!™, a menu-driven database system. The INTERNET address for GSA Advantage?™ is: gsaadvantage.gov.

Category: Multiple Award Schedule
Number: Professional Services
Contract Number: GS-02F-0188N
Modification Number: A812

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

Contract Period: August 26, 2018 - August 25, 2023
Contractor: David L. Houseman & Associates, LLC
King Street Station, PMB-119
1800 Diagonal Road, Suite 600
Alexandria, VA 22314-2840

Telephone No: (703) 690-4105
Fax: 877-728-7117

Contract Administration: Same as above
Business Size: Small Business/Other than Minority
CUSTOMER INFORMATION FOR ORDERING ACTIVITIES

1. Table of Awarded Special Item Numbers:

   SINs awarded: 611430

2. All SINS Maximum Order Limitation: $1,000,000.00

3. MINIMUM ORDER LIMITATION: $100.00

4. GEOGRAPHIC COVERAGE: 48 Contiguous States, Alaska, Hawaií, and Puerto Rico (DELIVERY AREA)

5. Points of Production: United States

6. Discount from list prices or statement of net prices: A 40.25% discount from the list price applies to all agency specials. The GSA Schedule prices include minor modifications to course materials to include sample agency specific documents and forms. A GSA discount of 50.25% applies to orders that acquire more than 14 classes or more than $100,000 on a single order. A GSA discount of 55.25% applies to orders that acquire more than 29 classes or more than $250,000 on a single order.

   Industrial Funding Fee (IFF): The IFF of 0.75% is included in the above pricing without affecting the discounts offered to our GSA contract clients.

7. Quantity Discounts: See above “Discount from list prices or statement of net prices.”

8. Prompt Payment Terms: NET 30 Days

9a. Notification that Government purchase cards are accepted up to the micro-purchase threshold: Houseman & Associates accepts the purchase card for micro-purchases.

9b. Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold: Houseman & Associates accepts the purchase card above the micro-purchase threshold.

10. Foreign Items: N/A

11a. Time of Delivery: Scheduling of courses is based upon mutual consent of Houseman & Associates and the ordering agency.

11b. Expedited Delivery: N/A

11c. Overnight and 2-day Delivery: N/A
11d. **Urgent Delivery:** N/A

12. **F.O.B. Point(s):** Destination (Prices exclude reimbursable expenses for instructor travel or off-site conference space)

13. **Ordering Address(es):** David L. Houseman & Associates, LLC, 1800 Diagonal Road, PMB-119, King Street Station, Suite 600, Alexandria, VA 22314

14. **Payment Address(es):** David L. Houseman & Associates, LLC, 1800 Diagonal Road, PMB-119, King Street Station, Suite 600, Alexandria, VA 22314

15. **Warranty Provision:** N/A

16. **Export Packaging Charges, if applicable:** N/A

17. **Terms and Conditions of Government purchase card acceptance:** Houseman & Associates accepts the purchase card for all course registrations and payments.

18. **Terms and Conditions of rental maintenance, and repair:** N/A

19. **Terms and conditions of installation:** N/A

20. **Terms and conditions of repair parts indicating date of parts lists and any discounts from list price:** N/A

20a. **Terms and conditions for any other services (if applicable):** N/A

21. **List of Service and Distribution:** N/A

22. **List of Participating Dealers:** N/A

23. **Preventive Maintenance:** N/A

24. **Year 2000 (Y2K) compliant:** N/A

25. **Environment Attributes:** N/A

26. **Data Universal Number System (DUNS) Number:** 177291986

27. **Notification regarding registration in System for Award Management (SAM) database:** David L. Houseman & Associates, LLC is registered in SAM.
GSA Federal Supply Schedule Course Listing  
(GS-02F-0188N)

Note: A “List” price is the price offered to our most favored commercial customer.

A “GSA” price includes all applicable GSA customer discounts + GSA’s Industrial Funding Fee

**TR-01 FCR 201: COR Level 2:** This 5-day course looks to improve agency acquisitions and contractor performance by enhancing COR knowledge and practical application of contracting principles. It covers the acquisition process, legal requirements, and COR duties; developing a procurement request package including a work statement, cost estimate, and source selection criteria; competition requirements, communications with prospective offerors, and confidentiality requirements; proposal evaluation and source selection; quality/schedule assurance; payment reviews; contract modifications and contractual remedies; and procurement ethics. This course fulfills the business and technical competency requirements of FAC-COR.

This 5-day course is offered on an agency special basis only.

*Tuition*: List $16,500; GSA Price $9,933.

*Special Discounts:*  
- $8,271/class (>14 classes or >$100,000 on a single order)  
- $7,439/class (>29 classes or > $250,000 on a single order)

**TR-02 COR Refresher/Update Training:** This 1-day course is designed for agencies, which require 8 CLPs of refresher/update training every two years. It covers recent statutory and regulatory changes that affect COR responsibilities. It also provides an overview of their contract management, planning for quality and schedule assurance; review/approval of technical submittals; and payment reviews.

This 1-day course is offered on an agency special basis.

*Tuition*: List $8,250; GSA Price $4,966.

*Special Discounts:*  
- $4,135/class (>14 classes or >$100,000 on a single order)  
- $3,720/class (>29 classes or > $250,000 on a single order)

**TR-03 Task Order Contracting for CORs:** This 1-day course looks to improving task placement against indefinite delivery indefinite quantity (IDIQ) contracts through training CORs and other program personnel (e.g., task managers) responsible for generating work requirements, processing task requests, and assisting in task order placement.

This course is offered on an agency special basis only. The course handbook and presentations are adapted to the procedures and forms of the client agency’s contracts.
This 1-day course is offered on an agency special basis.

*Tuition:* List $8,250; GSA Price $4,966.

*Special Discounts:*  
$4,135/class (>14 classes or >$100,000 on a single order)  
$3,720/class (>29 classes or > $250,000 on a single order)

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**TR-04 Simplified Acquisition for CORs:** This 2-day course focuses on COR input to processing support service purchase orders. It provides CORs with information and tools necessary to prepare purchase requests for support services; identify the appropriate source of supply; and assess technical/price quotations, support negotiations, and recommend source selection, and management performance.

It is designed to ensure that CORs understand the unique rules and procedures applicable to making legal and otherwise proper purchases. It covers common responsibilities of CORs assigned to such requirements, applicable purchase clauses, service requests, and inspection under principles of expressed/implied warranty, and payment.

This course is offered on an agency special basis only. The course handbook and presentations are adapted to the procedures and forms of the client agency’s purchases.

*Tuition:* List $11,000; GSA Price $6,621.

*Special Discounts:*  
$5,513/class (>14 classes or >$100,000 on a single order)  
$4,959/class (>29 classes or > $250,000 on a single order)

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**TR-05 COR Management of IT Service Contracts:** This 1-day course looks to improving contractor performance by enhancing COR knowledge and practical application of IT contract management principles, policies and procedures from contract award through contract completion. It includes coverage of the enterprise performance life cycle (EPLC), stage gate and the common baseline reviews, and security requirements.

This course is offered on an agency special basis only. The course handbook and presentations are adapted to the procedures and forms of the client agency’s contracts.

This 1-day course is offered on an agency special basis.

*Tuition:* List $8,250; GSA Price $4,966.

*Special Discounts:*  
$4,135/class (>14 classes or >$100,000 on a single order)  
$3,720/class (>29 classes or > $250,000 on a single order)
**TR-06 FCR-403: Advanced COR Refresher:** This course is designed to update participants on recent acquisition changes that are germane to COR interests as well as providing guidance in executing their responsibilities in the following areas in performance-based acquisition, cost estimating and analysis, negotiation support, and contract management.

This course is offered on an agency special basis only. The course handbook and presentations are adapted to the procedures and forms of the client agency’s contracts.

This 5-day course is offered on an agency special basis.

*Tuition:* List $16,500; GSA Price $9,933.

*Special Discounts:*  
$8,271/class (>14 classes or >$100,000 on a single order)  
$7,439/class (>29 classes or > $250,000 on a single order)

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**TR-07 Performance-based Work Statements:** This 2-day course focuses on preparing a PWS for professional support services contracts. It presents a standard approach and format for developing a PBS including the Scope, Specific Tasks, Deliverables, Dates, Acceptance Criteria, and Monetary and Non-Monetary Performance Incentives. It links the PWS to the Quality Assurance Surveillance Plan and Contractor Performance Evaluations.

This 2-day course is offered on an agency special basis only. The course handbook and presentations are adapted to the procedures and forms of the client agency’s contracts.

*Tuition:* List $11,000; GSA Price $6,621.

*Special Discounts:*  
$5,513/class (>14 classes or >$100,000 on a single order)  
$4,959/class (>29 classes or > $250,000 on a single order)

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**TR-08 Leadership Skills for CORs:** This 1-day course is an introduction to essential leadership skills for CORs. It emphasizes the key FAC-COR competencies of flexibility, influencing/negotiating, interpersonal skills, and teamwork. Participants will assess their personal leadership style, learn and integrate leadership behaviors into COR performance, and foster a high performance project team. They will be able to encourage productive team communication, provide constructive feedback, use influence skills to get results without direct authority, and effectively manage conflict.

This 1-day course is offered on an agency special basis only. The course workbook includes a self-assessment tool, presentations, and exercises.

*Tuition:* List $8,250; GSA Price $4,966.

*Special Discounts:*  
$4,135/class (>14 classes or >$100,000 on a single order)  
$3,720/class (>29 classes or >$250,000 on a single order)
TR-09 **Preparing an Independent Government Estimate**: This 1-day course explains the why, what, when, and how of price and cost estimating for new acquisitions (including task orders). It covers principles of price versus cost estimates; how to identify price and cost drivers; and how to use analogous, parametric, three-point, and detailed estimating techniques. It is "hands-on" training, using examples to show how estimates should be generated and how they should be analyzed.

This 1-day course is offered on an agency special basis only.

*Tuition*: List $8,250; GSA Price $4,966.

*Special Discounts*: $4,135/class (>14 classes or >$100,000 on a single order)
$3,720/class (>29 classes or >$250,000 on a single order)

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TR-10 **Market Research**: This 1-day course focuses on implementing the FAR requirement to conduct market research for all acquisitions exceeding the simplified acquisition threshold or whenever the situation calls for it such as “new requirements” or “limited source justifications.” It focuses on identifying market research needs; performing market research; analyzing market research results; and preparing a market research report. It guides participants through each market research step and option including accessing and using high value websites and exploring effective strategies and tactics to address acquisition needs. Participants are provided with templates for conducting a market research meeting, issuing a market research announcement, and preparing a market research report.

This 1-day course is offered on an agency special basis.

*Tuition*: List $8,250; GSA Price $4,966.

*Special Discounts*: $4,135/class (>14 classes or >$100,000 on a single order)
$3,720/class (>29 classes or >$250,000 on a single order)

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TR-11 **Advanced COR**: Initial COR certification training focuses on acquisition, rules, and procedures. This 5-day course focuses on how to effectively select sources and manage contracts. Its covers how to choose and customize select procedures for different requirements; how to assess offeror proposals and render a selection decision; how to prepare for quality/schedule assurance, guide contractor performance, and ensure proper payments; and how to foster a proper business partnership with a contractor.

This 5-day course is offered on an agency special basis only.

*Tuition*: List $16,500; GSA Price $9,933.

*Special Discounts*: $8,271/class (>14 classes or >$100,000 on a single order)
$7,439/class (>29 classes or > $250,000 on a single order)
**TR-12 Changes/Modifications for CORs:** Most contract documents are not perfectly written as issued. Often there is a need to change the language to "clean up" omissions or other errors in the statement of work or add new requirements which were not envisioned prior to contract award. Modifications may be issued to other technical requirements (e.g., a performance schedule), to add funding, or for purely administrative requirements (e.g., designation of the COR).

This 1-day course covers how to properly process a modification; when/how to process special modifications such as change orders, acceleration or stop work orders, and convenience terminations; how to recognize/avoid constructive changes; and how to assess requests for equitable adjustment.

This 1-day course is offered on an agency special basis.

*Tuition:* List $8,250; GSA Price $4,966.

*Special Discounts:* $4,135/class (>14 classes or >$100,000 on a single order)  
$3,720/class (>29 classes or > $250,000 on a single order).

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**TR-13 Contractor Performance Evaluation:** Contracting Officers Representatives (CORs) are responsible for assessing and documenting contractor technical performance. These assessments may be used to (i) detect performance problems and initiate corrective action; (ii) allocate monetary and non-monetary performance incentives; (iii) prepare interim and final performance assessment reports; and (iv) make subsequent source selections.

This 1-day course provides tools and related information necessary to establish a performance measurement baseline (PMB), assess performance against the PMB, determine “how well” the contractor performs, and take appropriate action from initiating corrective action through future source selections.

This 1-day course is offered on an agency special basis.

*Tuition:* List $8,250; GSA Price $4,966.

*Special Discounts:* $4,135/class (>14 classes or >$100,000 on a single order)  
$3,720/class (>29 classes or > $250,000 on a single order).

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**TR-14 Negotiation Strategies for CORs:** CORs play a critical role in negotiating sound contract agreements. They identify technical and cost proposal weaknesses and potential tradeoffs. They assist the contracting officer in setting negotiation objectives including target, minimum, and maximum cost positions and must-have, give, and bargaining points. They assist the CO in preparing a negotiation strategy and tactics for achieving negotiating objectives. And they assist the CO during negotiation; determine when/how to alter tactics; and assess results.
This 1-day course focuses on how to prepare for and conduct negotiations. It uses an integrated negotiation exercise to reinforce course principles.

This 1-day course is offered on an agency special basis.

Tuition: List $8,250; GSA Price $4,966.

Special Discounts: $4,135/class (>14 classes or >$100,000 on a single order)
                 $3,720/class (>29 classes or > $250,000 on a single order)

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**TR-15 Basic Contracting for CORs (COR Level 1):** This 1-day course presents an overview of the contracting process, key contracting policies, and the role of the COR. It is designed for technical personnel who are seeking COR Level I certification and will be assigned to noncomplex, low-risk contracts and/or whose only involvement in the contracting process is to assist their organization in assessing the technical merit and price reasonableness of competitive proposals.

This 1-day course is offered on an agency special basis.

Tuition: List $8,250; GSA Price $4,966.

Special Discounts: $4,135/class (>14 classes or >$100,000 on a single order)
                 $3,720/class (>29 classes or > $250,000 on a single order)

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**SA-01 Purchase Card Training:** This 1-day course presents cardholder and approving official responsibilities. It includes practical guidance on how to use purchase cards; purchase and usage limits; documentation, reconciliation, retention, and card security. It addresses purchases from required and open market sources.

This 1-day course is offered on an agency special basis only. The course handbook and presentations are adapted to the procedures and forms of the client agency and participating bank.

Tuition: List $8,250; GSA Price $4,966.

Special Discounts: $4,135/class (>14 classes or >$100,000 on a single order)
                 $3,720/class (>29 classes or > $250,000 on a single order)

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**SA-02 Purchase Card Refresher:** This 1-day course (i) refreshes attendees on the purchase card process; (ii) provides more in-depth coverage of required and open market micro-purchasing; (iii) identifies common problems needing attention; and (iv) addresses several legal matters that affect cardholder purchases. It references the latest techniques for buying commercial goods using required supply programs and accessing source and item information on the internet.
This 1-day course is offered on an agency special basis only. The course handbook and
presentations are adapted to the procedures and forms of the client agency and participating
bank.

*Tuition:* List $8,250; GSA Price $4,966.

*Special Discounts:* $4,135/class (>14 classes or >$100,000 on a single order)
$3,720/class (>29 classes or >$250,000 on a single order)

**SA-03 Simplified Acquisition:** This 5-day course introduces purchasing personnel to the simplified
acquisition environment. It provides them with information and tools necessary to review incoming
purchase requests; identify the appropriate source of supply; evaluate product and pricing
information; issue written/oral orders; and provide purchase follow-up. It references the latest
purchasing techniques applicable to buying commercial items, using GSA Advantage, the GSA E-
Library, and E-buy; and accessing source/item information on the Internet.

This 5-day course as well as a modified 3-day version is offered on an agency special basis only.

*Tuition:* List $16,500; GSA Price $9,933.

*Special Discounts:* $8,271/class (>14 classes or >$100,000 on a single order)
$7,439/class (>29 classes or >$250,000 on a single order)

**SA-04 Simplified Acquisition Refresher:** This 2-day course presumes that attendees are familiar
with standard simplified acquisition (SA) procedures covered by FAR 13. It updates attendees on
purchasing rules and procedures contained in the FAR and agency policies and guidelines. It
focuses upon common purchasing problems and techniques for making more informed and effective
purchases of items and services. It also presents methods for streamlining purchasing workload and
procedures in line with internet access and evolving purchasing policy and practice. Finally, it
covers the legal framework for SAs including applicable portions of federal regulation, Uniform
Commercial Code, and case law decisions.

This course is offered on an agency special basis only. The course handbook and presentations
are adapted to the procedures and forms of the client agency’s purchases.

*Tuition:* List $11,000; GSA Price $6,621.

*Special Discounts:* $5,513/class (>14 classes or >$100,000 on a single order)
$4,959/class (>29 classes or > $250,000 on a single order)
SA-05 **Advanced Simplified Acquisition**: This 3-day course addresses the professional aspects of purchasing. It presents the legal structure of purchasing including regulatory requirements, Uniform Commercial Code principles, and case law decisions. It focuses upon new requirements and techniques for acquiring commercial items; special policies and guidelines for procuring support services; provision and clause selection/development; and purchase order administration.

This 3-day course is offered on an agency special basis only. The course handbook and presentations are adapted to the procedures and forms of the client agency’s purchases.

*Tuition*: List $13,000; GSA Price $7,825.

*Special Discounts*: $6,515/class (>14 classes or >$100,000 on a single order)  
$5,861/class (>29 classes or >$250,000 on a single order)

SA-06 **Work Statements for Simplified Acquisitions**: This 1-day course focuses on the most important document in government purchasing, the statement of work (SOW). Participants are given a SOW template comprised of six sections plus step-by-step guidelines on preparing each section. Examples and exercises demonstrate application. Instructor feedback reinforces essential principles and guides participant learning.

This 1-day course is offered on an agency special basis only. The course handbook and presentations are adapted to sample purchase of the client agency.

*Tuition*: List $8,250; GSA Price $4,966.

*Special Discounts*: $4,135/class (>14 classes or >$100,000 on a single order)  
$3,720/class (>29 classes or >$250,000 on a single order)

PM-01 **Contract Management for Executives**: This 1/2-day course looks to build a sensible understanding and relationship between senior level agency personnel and contract managers (contracting officers, CORs, CORs, and other contract management personnel) to promote meeting agency needs through effective contract management.

This course is offered on an agency special basis only.

*Tuition*: List $6,250; GSA Price $3,762.

*Special Discounts*: $3,132/class (>14 classes or >$100,000 on a single order)  
$2,818/class (>29 classes or >$250,000 on a single order)
**PM-02 Funds Management:** This 2-day course provides a framework for Project Managers, Contracting Officers, CORs, and Task Managers to effectively grasp basic funds management policies, principles, and practices. It sets forth successful strategies and tactics as well as how to apply them in order to achieve program goals.

This course is offered on an agency special basis only.

*Tuition:* List $11,000; GSA Price $6,621.

*Special Discounts:*
- $5,513/class (>14 classes or >$100,000 on a single order)
- $4,959/class (>29 classes or > $250,000 on a single order)

**FAL-01 Federal Appropriations Law:** This 2-day course provides participants a framework for identifying and resolving appropriations law issues that arise in their own line of work. It focuses on the availability of appropriations as to purpose, amount, and time. It also explains (i) basic constitutional and legislative controls and processes affecting federal funds; (ii) fiscal law terminology; (iii) fundamental rules of statutory construction; (iv) the concept of “obligation” in appropriations law; and (v) application of appropriations law to interagency transactions.

This course is offered on an agency special basis only.

*Tuition:* List $11,000; GSA Price $6,621.

*Special Discounts:*
- $5,513/class (>14 classes or >$100,000 on a single order)
- $4,959/class (>29 classes or > $250,000 on a single order)

**FAL-02 Federal Appropriations Law Refresher:** This 1-day refresher course is intended for participants who have successfully completed a Federal Appropriations Law (FAL) overview course. It provides a refresher and update of the most important legal principles covered in the FAL course and illustrates those principles through lecture, group discussion, and exercises utilizing recent Comptroller General Opinions. In addition, it explores the legal principles relating to Current Resolutions and Interagency Agreements.

This course is offered on an agency special basis only.

*Tuition:* List $8,250; GSA Price $4,966.

*Special Discounts:*
- $4,135/class (>14 classes or >$100,000 on a single order)
- $3,720/class (>29 classes or >$250,000 on a single order)
CR-01 Course Related Support Services: Course related support services include development of course materials, review of agency purchasing policies and practices, purchasing audits, assessment of FAC-COR implementation and related agency COR policies and practices, and development and/or review of performance-based contracting practices and documents.

Hourly Rate: List $335; GSA Rate $267 (includes GSA Industrial Funding Fee)

Special Discount: $213 (>39 hours are purchased under a single order).

DTR-01 Contracting Officer’s Representative (COR-222 Equivalent): This 4-day course is specifically designed for Contracting Officer's Representatives (CORs) who are responsible for assuring that contractors perform in accordance with the terms and conditions of the contract. It will provide CORs the breadth of knowledge required to perform their role, including knowledge related to COR roles and responsibilities, as well as fundamentals of contracting regulations, types, phases, and other elements; awareness of ethical and legal factors that impact COR responsibilities; and information necessary to effectively evaluate situations, apply knowledge gained, and make correct decisions to carry out COR responsibilities.

This 4-day course is offered on an agency special basis only.

Tuition: List $14,750; GSA Price $8,813.

Special Discounts: $7,338/class (>14 classes or >$100,000 on a single order)
$6,600/class (>29 classes or > $250,000 on a single order)