



General Services Administration Federal Supply Service Authorized Federal Supply Schedule Price List

Human Resources and Equal Opportunity Services
FSC Group 738X

CONTRACT No. GS-02F-0214R

Through Modification PO-0006, PS-0007, effective 09/07/2015 – 09/06/2020

CONTRACTOR

The Segal Company – Washington, DC
1920 N Street NW, Suite 400
Washington, DC 20036
Web site: www.segalco.com
Telephone Number: (202) 833-6400
Facsimile: (202) 833-6490

CONTRACT ADMINISTRATOR

The Segal Company – Washington, DC
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MARKETING AND TECHNICAL POC

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Business Size: Large

Prices shown herein are NET (discount deducted).

Online 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: <http://www.gsaadvantage.gov>.



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General Contract Information

- 1.a** Table of Awarded Special Item Number 595-21
(Please refer to pages 12 and 13 for a more detailed description)
 - > Position Classification
 - > Personnel Actions
 - > Employee Relations
 - > Attitude Opinion Surveys
 - > Federal Employee Health Benefit
 - > Federal Employee Group Life Insurance Plan
 - > Federal Employee Retirement System
 - > Leave
- 1. b** Lowest-Priced Model Number and Lowest Price \$164.80, Web/Internet Specialist
- 1. c** Labor Category Descriptions Per refer to pages 16 and 17.
- 2.** Maximum Order SIN 595-21: \$1,000,000
- 3.** Minimum Order \$100.00
- 4.** Geographic Coverage Domestic
- 5.** Point(s) of Production The Segal Company – Washington, DC
1920 N Street NW, Suite 400
Washington, DC 20036
- 6.** Discount from List Price All prices herein are net
- 7.** Quantity/Volume Discounts 2% discount for individual long-term contracts (of one year) which guarantee contracts value at \$1M+.
- 8.** Prompt Payment Terms 0%, Net 30 days
- 9. a-b** Government Purchase Card is accepted below and above the micro-order threshold.
- 10.** Foreign Items None
- 11. a-d** Time of Delivery To be negotiated with ordering office
- 12.** F.O.B. Point(s) Destination
- 13. a** Ordering Address The Segal Company – Washington, DC
1920 N Street NW, Suite 400
Washington, DC 20036
Web site: www.segalco.com
Telephone Number: (202) 833-6400
Facsimile: (202) 833-6490
- 13. b** For supplies and services, the ordering procedures, information on blanket purchase agreements (BPA's), and sample BPA can be found at the GSA/FSS schedule homepage (fss.gsa.gov/schedules)
- 14.** Payment Address The Segal Company
Church Street Station
P.O. Box 4059
New York, NY 10261-4059



General Contract Information

15.	Warranty Provision	Standard Commercial Warranty
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. a	Terms and Conditions of Repair Parts Indicating Date of Parts Price Lists and any Discounts From List Prices	Not applicable
20. b	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
24. a	Special Attributes Such as Environmental Attributes (e.g., recycled content, energy efficiency and/or reduced pollutants)	Not applicable
24. b	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).	Not applicable
	The EIT standards can be found at: www.Section508.gov/ .	
25.	Data Universal Number System (DUNS) Number	018529479
26.	The Segal Company, is registered in the System for Award Management (sam.gov) database.	



Special Item Number (SIN) Descriptions

SIN 595 – 21

POSITION CLASSIFICATION

Segal's range of services include:

- Review position description for adequacy
- Implement classification standards
- Prepare evaluation statements
- Conduct audits
- Counsel employees who wish to submit classification appeals
- Provide advice on position management, organization structure supervisor/worker ratio and impact of mission/workload changes;
- Assist in the preparation of position descriptions.

Services may be provided with or without delegation of classification signature authority to line managers dependent upon agency policies and requirements.

EMPLOYEE RELATIONS

Segal's range of services include:

- Facilitate joint labor management committees
- Provide comprehensive support in disciplinary actions as they relate to complaints, grievances, and appeals
- Evaluate leave administration, recognition and awards, performance management and appraisal, insurance benefits, Thrift Savings Plan, and retirement programs
- Guide and assist with completing necessary processes and documentation
- Serve as an interface with legal staff, union representatives, Department of Labor (DOL), Office of Personnel Management (OPM), other appropriate outside agencies, and the appropriate internal agency activities as required.

ATTITUDE OPINION SURVEYS

Segal's consultants develop custom surveys designed to collect data on a workforces' satisfaction and understanding of their total rewards package. Segal's employee opinion surveys collect data on employee attitudes regarding all aspects of the Employee Value Proposition. Segal's range of services include:

- Plan and customize survey design
- Determine appropriate survey data collection methodology
- Establish sampling frames
- Administer survey distribution and data collection methods
- Pretest/pilot survey instrument
- Conduct Focus Groups
- Analyze quantitative and qualitative survey data
- Produce reports, including but not limited to description and summary of results with associated graphs, charts and tables; description of data collection and survey administration methods; discussion of sample characteristics and the representative nature of data; analysis of nonresponse; and briefings of results to include discussion of recommendations and potential follow-up actions

Additionally, demographic information such as age and family status is collected so that we can pinpoint the diverse needs and expectations based on an employee's stage in life, occupation, position in an organization or other considerations.



Special Item Number (SIN) Descriptions

FEDERAL EMPLOYEES HEALTH BENEFIT PLAN

Segal's range of services include:

- Vendor Management
 - Competitive bidding
 - Contract negotiation
 - Vendor performance audits
- Plan Management Strategies
 - Plan design
 - Plan cost modeling/actuarial services
 - Funding strategies
 - Reserve adequacy
 - Contribution strategies
 - Coverage rules and protocols
- Individual Health Care Management
 - Wellness and prevention programs
 - Disease management programs
 - Catastrophic claimant programs
- Examples of more specific analyses or projects include:
 - Prescription drug plan design and audits
 - Medical claims history analyses
 - Retiree health plan cost containment strategies
 - Claims processing audit services
 - Health regulatory compliance assistance
 - Contribution strategies
 - Consumer-driven health plans

FEDERAL EMPLOYEE GROUP LIFE INSURANCE

Segal's range of services include:

- Design Basic and Supplemental Life Insurance programs

FEDERAL EMPLOYEE RETIREMENT SYSTEM

Segal's range of services include:

- Assist with actuarial funding requirements and related governmental certifications
- Design defined benefit, defined contribution, and deferred compensation plans
- Audit retirement plan valuation
- Model and value post-retirement medical plans
- Prepare calculations and disclosures under accounting regulations
- Conduct asset/liability modeling and related projections
- Provide investment consulting services through Segal Advisers, Inc., SEC-registered investment-consulting affiliate of The Segal Company
- Advise on each of the above-mentioned areas

LEAVE

Segal's range of services include:

- Design Paid Time Off and absence management programs
- Evaluate the value of leave programs as a part of Total Compensation
 - Inform employees about new benefits design, how it works and how it fits into a broader financial planning strategy



Labor Category Descriptions

Education can be substituted with experience at 2 years of additional experience for 1 year of education.

- Experience can be substituted with education at 1 year of advanced education for 1 year of experience.

GSA LABOR CATEGORY	GSA MINIMUM/ GENERAL EXPERIENCE	GSA FUNCTIONAL RESPONSIBILITY	GSA MINIMUM EDUCATION
Partner/Principal	Plans, organizes and controls the overall activities of the contract (i.e. project management, technical work, quality assurance, scheduling, and costs associated with various task orders issued under contract). Demonstrated ability to provide guidance and direction for multiple projects and in designing, implementing and managing employee benefits type of contracts. Capability to manage multitask projects. Provide primary interface with Contracting Officer's Technical Representative regarding strategic issues. Directs and ensures that all contractor-performed activities operate in conformance with terms and conditions of the contract and individual task orders. Coordinates all parties to task, reviews work products for completeness and adherence to requirements performed under the contract.	<p>A total of ten years experience is required for this position. Six years must be specialized experience. The remainder may be specialized or general experience.</p> <p>General Experience – At least five years of general experience to include financial, administrative, and project responsibility. The Partner/Principal must possess verbal and written skills sufficient to function in a high-level executive environment.</p> <p>Specialized Experience – At least five years of the above experience shall relate to management and oversight of employee benefits and compensation analysis and human resources operations in support of business organization, including administering contracts, supervising personnel and interacting with agency contracting, technical and functional personnel at all organizational levels.</p>	A Bachelor's Degree in Business Management, Economics, Statistics, Human Resources, Mathematics or other related study is desirable. A graduate degree in any of the latter will be considered equivalent to two years of specialized and three years of general experience.
Senior Manager	Developing and maintaining plans outlining steps and timetables for developing projects. Demonstrated ability to provide guidance and direction for multiple projects and in designing, implementing and managing employee benefits type of contracts. Capability to manage multitask projects. Directs and ensures that all contractor-performed activities operate in conformance with terms and conditions of the contract and individual task orders. Coordinates all parties to task, reviews work products for completeness and adherence to requirements performed under the contract.	<p>A total of eight years experience is required for this position. Four years must be specialized experience. The remainder may be specialized or general experience.</p> <p>General Experience – At least four years of general experience to include financial, administrative, and project responsibility. Senior Manager must possess verbal and written skills sufficient to function in a high-level executive environment.</p> <p>Specialized Experience – At least four years of the above experience shall relate to management and oversight of employee benefits and compensation analysis and human resources operations in support of business organization, including administering contracts, supervising personnel and interacting with agency contracting, technical and functional personnel at all organizational levels.</p>	A Bachelor's Degree in Business Management, Economics, Actuarial Science, Human Resources, Mathematics or other related study is desirable. A graduate degree in any of the latter will be considered equivalent to two years of specialized and three years of general experience.

Labor Category Descriptions

GSA LABOR CATEGORY	GSA MINIMUM/ GENERAL EXPERIENCE	GSA FUNCTIONAL RESPONSIBILITY	GSA MINIMUM EDUCATION
Senior Consultant	As a Senior Consultant, provides technical expertise and supervision to Consultant. Provides detailed knowledge of managing employee benefits type of contracts. Works closely with AO coordinator to ensure that all consulting support for this project is provided timely and with appropriate coordination. Responsible for work, supervises tasks, review work products for completeness. Interfaces with Contracting Officer's Technical Representative on a day-to-day basis.	A total of six years experience is required for this position. Three years must be specialized experience. The remainder may be specialized or general experience. General Experience – At least four years of general experience to include financial, administrative, and project responsibility. Senior Consultant must possess verbal and written skills sufficient to function in a high-level executive environment. Specialized Experience – At least two years of the above experience shall relate to management and oversight of employee benefits and compensation analysis and human resources operations in support of business organization, including supervising personnel and interacting with agency contracting, technical and functional personnel at all organizational levels.	A Bachelor's Degree in Business Management, Economics, Human Resources, Actuarial Science, Mathematics or related study is desirable.
Consultant	Demonstrated experience participating in projects similar to those identified in Section C. Specific expertise in one or more of the key areas. Serves as liaison between the Contracting Officer and/or the Contracting Officer's Technical Representative on a day-to-day basis. Supports the completion of project specific tasks within estimated time frames and budget constraints.	A total of four years experience is required for this position. Two years must be specialized experience. The remainder may be specialized or general experience. General Experience – At least two years of general experience to include financial, administrative, and project responsibility. Consultant must possess verbal and written skills sufficient to function in a high-level executive environment. Specialized Experience – At least two years of the above experience shall relate to management and oversight of employee benefits and compensation analysis and human resources operations in support of business organization, including supervising personnel and interaction with agency contracting, technical and functional personnel at all organizational levels.	A Bachelor's Degree in Business, Actuarial Science, Human Resources, Mathematics or related study is required.
Web Internet Specialist	Creates and maintains web server applications in support of the benefits plan's web-related activities. Maintains integrity of World Wide Web data and program tree. Works with production personnel in preparation of HTML pages for sites.	A total of five years is required for this position. Two years must be specialized experience. The remainder may be general or specialized experience. General Experience – At least five years of general experience in the computer field. Specialized Experience – At least two years performing the types of duties discussed above.	Bachelor's degree in Computer Science, Information System, Business, Engineering, or a related field is desired.



Rates for Services

From September 7, 2015 until September 6, 2020, the Segal Company's rates for services are as follows:

GSA LABOR CATEGORY	GOVERNMENT RATE/HR RATE/HR
Partner/Principal	\$375.00
Senior Manager	\$300.00
Senior Consultant	\$250.00
Consultant	\$175.00
Web/Internet Specialist	\$125.00

Public Sector Consulting

The Segal Company serves as employee benefits, actuarial, compensation and human resources consultants to the full range of public sector clients: state and local governments, statewide retirement systems and health plans and federal government agencies.

Services

Our consulting services for public sector clients include the planning, design, qualification, implementation, operation, and communication of:

- Employee communications services, including personalized communication/benefit statements,
- Defined benefit and defined contribution plans,
- Life, survivor income and disability programs,
- Health benefits programs,
- Long-term care programs,
- Flexible benefit and LifeCycle benefit plans,
- Compensation plans,
- Apprenticeship and training plans,
- Vacation, earned time and flextime programs,
- Work/life initiatives,
- Domestic partner benefits,
- Human resources policies, programs and related services and
- Administration and technology consulting.

The Segal Company's actuarial services include the design of defined benefit and defined contribution plans, the preparation and review of actuarial valuations, the valuation of retiree health plan liabilities and obligations, long-term disability plans and other health programs. The company's actuarial reports pinpoint significant findings, present available options, explore alternatives, measure assumptions, and highlight changes and trends. Our professional actuarial staff includes Fellows and Associates of the Society of Actuaries, Members of the American Academy of Actuaries, Fellows, and Members of the Conference of Consulting Actuaries, Enrolled Actuaries and Fellows of the Canadian Institute of Actuaries.

Investment Services

Investment performance services are provided by [Segal RogersCasey](#), the investment-consulting affiliate of The Segal Company.



Introduction

Leadership in the Public Sector

In partnership with our public sector clients, we have developed cutting-edge benefit approaches that provide secure retirements and quality health care for public employees. Offering nearly universal coverage and comprehensive benefits requires sponsors of public sector plans to continually search for cost efficiencies and innovations.

- The Segal Company is a leading architect in the design and implementation of retirement plans and health care alternatives that provide employees with expanded choice and employers with more financial and quality control. Strategic benefits planning is the key tool we use to assess the current environment, develop future directions, identify long-term goals and implement change for our clients.
- Just as health care benefits in the private sector were revolutionized in the 1980s through managed care and flexible benefit programs, retirement benefits are now being reevaluated. Working with our public sector clients, The Segal Company has developed pension plan alternatives that combine characteristics of both defined benefit and defined contribution plans. These "hybrid" plans are innovations that reward both career employees and attract high-quality individuals to public service.
- The Segal Company is leading the way in assisting public benefits professionals with the selection of technology that will enhance customer service, promote administrative efficiency and streamline data collection. Our clients, having tapped into our expertise, are using technology as a tool to prepare for servicing a growing retiree population, develop electronic enrollment programs, install interactive-voice response systems and improve internal communication.
- The Segal Company's leadership role in national public sector organizations is widely recognized, as is our role in the review and development of public employee benefit programs. Our professionals are frequent speakers, authors and advisors to organizations such as the National Association of State Retirement Administrators, National Council on Teacher Retirement, Government Finance Officers Association, National Association of Government Deferred Compensation Administrators and the National Association of Public Pension Plan Attorneys.
- Seeing a need for a state and local government health benefits organization, The Segal Company was instrumental in the founding of the State and Local Government Benefits Association (SALGBA). Today, nearly 15 years after our initial sponsorship and organization of its first two conferences, SALGBA is a thriving organization devoted to the special issues and challenges confronting public sector health benefit plans.
- Serving as a source of information and resources is a contribution of The Segal Company to the public sector. Annually, we survey each of the 50 states and report on how state employees and retirees receive health care benefits. Recently we wrote two guides for the public sector retirement community, *An Elected Official's Guide to Public Retirement Plans* and *Pension Simplification 1996: An Implementation Guide for Public Sector Employers*, both published by the Government Finance Officers Association. We will continue these and other efforts that support the public sector and provide leadership by identifying trends that shape public employee benefit plans.



The Segal Company Compensation Offerings

The Segal Company's Public Sector Compensation and Bargaining Practice (PSCBP) provides an array of customized consulting services dedicated to our public sector and collectively bargained clients. They include:

Employee Opinion Surveys

Using customized surveys, we evaluate total compensation preferences and priorities as well as identify key workforce demographics and highlight the importance of total compensation elements. Results from these surveys are used to design tailor-made reward systems.

Customized Total Compensation Surveys

Total compensation surveys target comparable employers, identifying representative benchmark positions and capturing information on pay ranges, maximum hiring pay rates, pay progression policies, performance-based reward systems, paid time off, health and welfare related coverage and retirement benefits.

Reward System Design and Implementation

Effective total reward systems should be designed to support compensation philosophies. We frequently work with clients to transform longevity-based pay programs to performance-based systems. Additionally, we facilitate and communicate reward system changes in a joint labor-management environment.

Cost Modeling

Most reward system redesigns result in a fiscal impact to the employer. Our modeling approach not only identifies the immediate effect of implementation but also provides a multi-year perspective to identify steady-state costs.

Classification Studies, Job Descriptions and Job Evaluation Analyses

Classification studies include development and analysis of job questionnaires and desk audits as the basis for updating the job structure, as well as job descriptions that are current and fully compliant with FLSA, ADA and other rules and legislation.

Collective Bargaining Consulting Services

Segal is widely recognized by both management and labor as an objective and credible source of expertise in all facets of collective bargaining at the negotiating table through technical support. We develop proposals and bargaining options for all economic issues, including detailed cost models and assist in mediation and arbitration.

Fund Office Compensation Studies

The PSCBP maintains a database of compensation and benefits information from about 125 multiemployer fund offices across the U.S., providing a customized analysis of fund office compensation and benefits market competitiveness to help develop sensible salary structures.

Human Resource-Related Training

Changes require training; large-scale changes demand effective and well-planned training. Our job is not complete until all those who manage new programs can do so effectively.

The PSCBP has the expertise to thoroughly analyze the data we collect and deliver to our clients recommendations that meet their needs and support their plans and initiatives.



The Segal Company Compensation Offerings

In a challenging economic environment shaped by volatile securities markets, 76 million baby boomers nearing retirement age, longer life spans and shifting workforce characteristics, employers and other plan sponsors require sophisticated analytical tools.

The Segal Company's retirement practice provides our public sector clients with the highest level of expertise to cope with these emerging dramatic developments through the strategic design, funding and monitoring of pension and related deferred compensation plans.

Segal's retirement practice is known for the depth of its knowledge. Many of our consultants are recognized as national experts, testifying before congress, leading professional associations and committees and speaking at national and regional conferences and forums. They are also regular contributors to professional magazines and journals.

The range of services offered include:

- Actuarial funding requirements and related governmental certifications
- Defined benefit, defined contribution, and deferred compensation plan design
- Retirement plan valuation audits
- Post-retirement medical plan valuations and related plan design/cost modeling
- Calculations and disclosures under accounting regulations
- Asset/liability modeling and related projections
- Defined contribution plan recordkeeping vendor searches and monitoring
- Comprehensive consulting advice on each of the above mentioned areas



The Segal Company Health Benefit Offerings

Demand for high quality, value and efficiency in health care delivery has never been greater.

In the current environment for public sector organizations:

- Health consumers want increased access to care, improved service and relevant and understandable information from plans and providers.
- Plan sponsors strive to maintain attractive health benefit packages to differentiate themselves in a complex marketplace while managing their bottom lines.
- Managed care organizations face the challenge of delivering quality health care, managing cost and preserving paper access to providers.

The Segal Company is uniquely qualified to help employers find the right solutions, having pioneered many innovations in health benefit design, purchasing, cost management and communications. Our focus has always been on carefully crafted strategies that make business, philosophical and practical sense to decision makers. Our consulting team includes experienced actuaries, insurance experts and claims auditors, managed care experts and client managers who are committed to helping public sector employers address their unique health benefits challenges.

We offer a wide range of highly customized, professional services that include:

Vendor Management

- Competitive bidding
- Contract negotiation
- Vendor performance audits

Plan Management Strategies

- Plan design
- Plan cost modeling/actuarial services
- Funding strategies
- Reserve adequacy
- Contribution strategies
- Coverage rules and protocols

Examples of more specific analyses or projects we might undertake include:

- Prescription drug plan design and audits
- Medical claims history analyses
- Retiree health plan cost
- Claims processing audit services
- Health regulatory compliance assistance
- Contribution strategies
- Consumer-driven health plans

Individual Health Care Management

- Wellness and prevention programs
- Disease management programs
- Catastrophic claimant programs