



# **GENERAL SERVICES ADMINISTRATION**

## **Federal Acquisition Service**

### *Authorized Federal Supply Schedule Price List*

Online access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through **GSA Advantage!**<sup>™</sup>, a menu-driven database system. The INTERNET address for **GSA Advantage!**<sup>™</sup> is <http://GSAAdvantage.gov>.

## **Schedule for – Mission Oriented Business Integrated Services (MOBIS)**

**Federal Supply Group: 874 Class: R499**

**Contract Number: GS-10F-0001X**

**For more information on ordering from Federal Supply Schedules**

**Click on the FSS Schedules button at <http://www.gsa.gov/schedules-ordering>**

**Contract Period: October 01, 2010 through September 30, 2015**

**Contractor:** Alvarez & Marsal Public Sector Services, LLC  
600 Madison Ave, 6<sup>th</sup> Floor  
New York, NY 10022-6025

**Business Size:** Large Business

**Telephone:** 202.729.2100

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**Fax:** 202.729.2101

**Website:** [www.alvarezandmarsal.com](http://www.alvarezandmarsal.com)

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**Contract Administration:** Kate Roques



## Customer Information

- 1a. **Table of Awarded Special Item Number(s) with appropriate cross-reference to page numbers:**  
874-1 and 874-1RC
- 1b. **Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract. This price is the Government price based on a unit of one, exclusive of any quantity/dollar volume, prompt payment, or any other concession affecting price. Those contracts that have unit prices based on the geographic location of the customer, should show the range of the lowest price, and cite the areas to which the prices apply.**
- 1c. **If the Contractor is proposing hourly rates, a description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform services shall be provided. If hourly rates are not applicable, indicate "Not Applicable" for this item.**
2. **Maximum Order:** \$1,000,000.00
3. **Minimum Order:** \$100.00
4. **Geographic Coverage (delivery Area):** Domestic Only
5. **Point(s) of Production (city, county, and state or foreign country):** Same as company address
6. **Discount from list prices or statement of net price:** Government net prices (discounts already deducted). See Attachment.
7. **Quantity Discounts:** None Offered
8. **Prompt Payment Terms:** Net 30 days
- 9a. **Notification that Government purchase cards are accepted up to the micro-purchase threshold:** Yes
- 9b. **Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold:** Will accept over \$3,000
10. **Foreign Items (list items by country of origin):** None
- 11a. **Time of Delivery (Contractor insert number of days):** Specified on the Task Order
- 11b. **Expedited Delivery. The Contractor will insert the sentence "Items available for expedited delivery are noted in this price list" under this heading. The Contractor may use a symbol of its choosing to highlight items in its price list that have expedited delivery:** Contact Contractor
- 11c. **Overnight and 2-day Delivery. The Contractor will indicate whether overnight and 2-day deliveries are available. Also, the Contractor will indicate that the schedule customer may contact the Contractor for rates for overnight and 2-day delivery:** Contact Contractor
- 11d. **Urgent Requirements. The Contractor will note in its price list the "Urgent Requirements" clause of its**



**contract and advise agencies that they can also contact the Contractor's representative to affect a faster delivery:** Contact Contractor

12. **F.O.B. Point(s):** Destination
- 13a. **Ordering Address:** Same as Contractor
- 13b. **Ordering Procedures:** For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA's), and a sample BPA can be found at the GSA / FSS Schedule homepage ([fss.gsa.gov/schedules](http://fss.gsa.gov/schedules)).
14. **Payment Address(es):** Same as company address
15. **Warranty Provision:** Contractor's standard commercial warranty
16. **Export Packing Charges (if applicable):** N/A
17. **Terms and conditions of Government purchase card acceptance (any thresholds above the micro-purchase level):** Contact Contractor
18. **Terms and conditions of rental, maintenance and repair (if applicable):** N/A
19. **Terms and conditions of installment (if applicable):** N/A
20. **Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable):** N/A
- 20a. **Terms and conditions for any other services (if applicable):** N/A
21. **List of service and distribution points (if applicable):** N/A
22. **List of participating dealers (if applicable):** N/A
23. **Preventive maintenance (if applicable):** N/A
- 24a. **Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants:** N/A
- 24b. **If applicable, indicate that 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 Numbering System (DUNS) number:** 14-9343563
26. **Notification regarding registration in Central Contractor Registration (CCR) database:** Registered.



## Corporate Overview

***Our mission is to be a premier partner to government clients solving challenging issues with a relentless focus on execution and delivering real results to the taxpayer.***

### ***Leading in Challenging Times – Highlights of Approaches to Turnaround Critical Programs***

- Providing leadership to critical budget issues and programs addressing internal and external challenges as well as financial and operational issues
- Rapidly build a robust historic and current state fact base including:
  - Near-term improvement opportunities
  - Financial analysis aligning statutory requirements, costs and revenues against performance measures
  - Identifying revenue enhancing opportunities including collaboration, Public/Private partnerships, asset re-use, etc
- Formulate a comprehensive program of turnaround initiatives including:
  - Assessment of costs
  - Assessment of scope and size of programs
  - Resource management plans
  - Detailed plans designed to optimize efficiency and effectiveness for critical services
  - Timing, resources and anticipated impact of the selected implementation plan
- Overlay identified turnaround initiatives into strategic plans
- Collaborate closely with stakeholders to best address non-core operations and execute the strategic and operational plan(s)

Founded in 1983, Alvarez & Marsal (“A&M”) has set the standard for working with organizations to solve complex problems, boost performance and maximize value. With more than 1,700 professionals across North America, Europe, the Middle East, Asia and Latin America, A&M delivers a distinct blend of leadership, problem solving and value creation. Drawing on its strong operational heritage and hands-on approach, A&M works closely with organizations and their stakeholders as advisors or as interim managers to help navigate complex business issues. A&M has been honored for its work by the Turnaround Management Association (TMA), receiving the prestigious Turnaround of the Year Award for our work. A&M has also received significant national attention in the Public Sector and has been written about in numerous publications, including: *The Wall Street Journal*, *The News Hour on PBS*, *The Chronicle of Philanthropy* and *Education Week*.

A&M’s unique experience has included: standing up and reopening schools post-Hurricane Katrina; serving in an advisory role in the management of federal grants for a U.S. Territory; implementing initiatives that saved millions of dollars in operating costs while increasing performance outcomes for multiple educational programs and managing the largest organizational wind downs in U.S. history. Our past performance demonstrates the ability to succeed in complex, time-sensitive, highly-regulated environments, and an unparalleled ability to



achieve fiscal and operational change. Our approach draws upon professionals with restructuring expertise combined with deep compliance experience of former senior regulators and operational leaders in finance management, healthcare, real estate, human capital management, disputes and investigations. We serve as strategic advisers and as tactical hands-on implementers of change.

### Firm Experience

A&M launched its Public Sector practice in 2003. The Public Sector practice provides specialized services to Federal, State and Municipal organizations. Alvarez & Marsal Public Sector Services has developed and refined a progressive, pragmatic and forward-looking approach to address the unique issues facing public-sector organizations. Our approach draws on more than 25 years of experience in improving the operational and financial performance of privately held and public companies, and more recently, public-sector organizations. Through each and every challenge, our goal is to enable a mode of service delivery in which value exceeds cost, funds are to be used judiciously, and quality of life is maintained and even enhanced. A&M has a broad range of experience of conducting complex analyses for commercial and government clients. This experience includes:

- Managing large restructuring and turnaround programs including current efforts at Lehman Brothers and Wachovia, and prior efforts on behalf of HealthSouth and Arthur Andersen.
- Providing interim management and support to clients in crisis including Public Schools and numerous commercial clients.
- Serving as a Third Party Fiduciary Agent and interim financial management to overcome serious recurring deficiencies in the administration of a US Territory's Federal programs.
- Identified and supported implementation of nearly \$290 million in recurring cost savings and reallocation back to the classroom over a two-year period for one of the largest Public School Systems in the country. This engagement involved A&M serving in multiple interim management roles.

*The urgency associated with **budget crises, receiverships and performance failures** increases our ability to achieve results. Unlike typical management consulting, strategy and financial advisory approaches, our restructuring approach **analyzes and implements solutions holistically.***



- Providing real estate and transaction advisory services for Enhanced Use Lease (EUL) programs that allows outleases of underutilized assets to developers for equal to or greater than fair market value of the leaseholder.
- Providing real estate and transaction advisory services for the disposition of low income housing at a state level.
- Performing feasibility and economic impact studies on major new tourism, commercial, real estate, and retail developments, including projecting direct and induced revenues and expenditures, employment, payroll and other fiscal impacts.
- Performing feasibility and economic impact studies, testified before state legislature and Federal regulatory agencies regarding changing bond law, calculated debt coverage from various sources including sales taxes, property taxes, parking fees, and payments-in-lieu-of taxes.
- Designing strategies and implementing approaches to provide technical assistance and guiding recipients on compliance related to receipt and management of Federal Recovery Act funds.

### **Our Services**

A&M Public Sector Services professionals assist clients in the following:

- Financial and Performance Restructuring and Turnaround
- Financial Management, Transactions and Receivership Services
- Asset Management and Forfeiture Services
- Real Estate Strategy, Transactions and Program Management
- Economic Development
- Forensic Accounting and Investigations
- Compliance Strategy, Implementation and Audits
- Dispute Analysis
- Healthcare Financial and Operational Improvement
- Claims Management
- Technology Strategy
- Crisis Management
- Organizational Design and Improvement
- Program and Project Management



### **A&M's Dedicated Industry / Sector Groups**

A&M's Public Sector Services professionals leverage the expertise of A&M's network in the following business units:

- Financial Industry Regulatory Advisory Services
- Healthcare Industry Group
- Real Estate Advisory Services
- Technology Asset Management Services
- Dispute Analysis and Forensic Services
- Business Consulting Services

### **DIFFERENTIATORS: OUR PEOPLE & OUR APPROACH**

#### **Practical, Rational, and Fact-Checked Data-Driven Advice**

Transformational change should be achieved not through “advice and consultation” but rather through committed, thorough, practical leadership. Alvarez & Marsal (A&M) takes an investigative approach to validating all relevant facts prior to diving into the project. An advisor should have extensive experience in managing change and provide only practical, rational, and data-driven recommendations that the client has the ability to implement.

#### **Track Record of Delivery for Critical State Functions**

A&M has been involved in critical transformations in school districts and State Departments of Education to close budget gaps while simultaneously increasing compliance with State and Federal requirements, driving increased performance outcomes in areas like Special Education, increasing revenue opportunities through gaining foundation and competitive grants support, and improving fiscal management and oversight.

#### **Ability to Manage Complexity with Flexibility**

A&M advisors have the necessary experience in effectively managing the most demanding environments and situations. Our A&M advisors have mastered the ability to listen and engage with public sector leadership teams, no matter how difficult the situation. They represent a turnaround firm that has a reputation for revitalizing major organizations, with the political astuteness that reflects this experience.

#### **A Mission-Based, Big Picture Mentality**

Starting from a “blank sheet of paper,” advisors work closely with key stakeholders to identify required outcomes and agency interdependencies upon which outcomes may rely. A&M validates and tests the



outcomes to discover: (a) If they are the same outcomes desired by the organization’s constituents; and (b) Do those outcomes reinforce and integrate into the organizations overall vision and mission? A&M maintains a focus on financial and programmatic operations while maintaining a deep appreciation for the long-term objectives of the organization necessary for sustainable transformation. We always focus on the ultimate goal – how is the program recipient impacted?

### **Seniority of Our People**

The A&M team is comprised of seasoned operators who have been in your shoes. Our teams include leadership with an average of 20+ years of experience, and many have held private and public sector management positions. Because of this depth of experience we are able to field a smaller team of professionals to work with your staff. At the same time we are a full-service firm, with a breadth of offerings and of resources; these attributes allow us to fully staff this project with the right resources, without impacting your personnel’s time. Our team understands the high level of exposure in this type of engagement, as well as the function and scale of the services required to support them.

### **Operational & Financial Heritage**

Our firm has a heritage of delivering results, not documentation. We assume more responsibility for execution and final results than a traditional consulting advisor. Whether the firm is acting as a hands-on partner or serving in an interim management capacity, we are able to accelerate the pace of change and increase the magnitude of the benefits.

### **Pricing Flexibility**

Our culture and cost structure allow us to be flexible in our approach and enable us to recruit and dedicate high performing, experienced consultants on a full-time basis to our client engagements. We are experienced in various pricing methods. As a result, we are prepared to craft creative pricing scenarios, such as share in savings and transactional type structures which provide a win-win value proposition to both the client and A&M.

### **Accountability for Results**

A&M advisors are expected to not only recommend implementable solutions but also deliver results. All A&M advisors will be accountable for the outcomes. All advisors serving interim leadership roles in public sector agencies are able to undertake massive scale change around very tight time frames and extremely limited funding availability. A&M is willing and able to assume high levels of accountability for the client’s mission. After a transformation initiative is complete, A&M facilitates a smooth transition to a permanent agency team. As one of our clients put it “You don’t diagnose my problems and tell me what I need to do to fix them. You OWN my problems and the solutions.”



## Pricing Information

### Alvarez & Marsal Public Sector Services LLC MOBIS Labor Categories and Hourly Rates (w/ IFF)

SIN	MOBIS Labor Category	Base Period Hourly Rates (w/ IFFs)				
		Year 1	Year 2	Year 3	Year 4	Year 5
874-1	Managing Director	\$400.00	\$412.00	\$424.36	\$437.09	\$450.20
874-1	Director	\$335.00	\$345.05	\$355.40	\$366.06	\$377.04
874-1	Senior Functional Expert / Senior Director	\$360.00	\$370.80	\$381.92	\$393.38	\$405.18
874-1	Functional Expert / Consultant II	\$300.00	\$309.00	\$318.27	\$327.82	\$337.65
874-1	Manager I	\$289.10	\$297.77	\$306.70	\$315.90	\$325.38
874-1	Senior Associate	\$275.00	\$283.25	\$291.75	\$300.50	\$309.52
874-1	Associate	\$204.23	\$210.36	\$216.67	\$223.17	\$229.87
874-1	Analyst	\$183.92	\$189.44	\$195.12	\$200.97	\$207.00



## MOBIS Labor Category Descriptions

Labor Category	Responsibilities	Minimum Education	Minimum Experience	Substitution Methodology
Managing Director	<p>Has overall responsibility for the work performed. Has experience in leading and providing technical direction for consulting projects. Serves as the primary point of contact for critical matters related to the project. Provides leadership for client interactions and overall activities of the consulting project to ensure that all work performed is in compliance with professional standards, the goals of the client, and the guidelines of Alvarez &amp; Marsal, directs the activities of the functional management team of the strategic business unit in ensuring that policies and controls are in place for all functions. May manage multiple projects simultaneously.</p>	<p>Bachelor’s Degree from a four-year accredited college / university</p>	<p>12 years</p>	<p>An advanced degree may be substituted for a year of professional experience.</p> <p>Project Management Professional certification may be substituted for a year of professional experience.</p>
Director	<p>Leads and directs project personnel, manages team schedule, budget, cost and risk associated with project delivery. Applies business management experience in consulting to define technical approaches, standards, execution approach and quality control across a variety of requirements including, but limited to, operational design, cost analysis, performance outcomes, process design and program management. Identifies and engages support of technical expertise as required based upon project requirements, size and complexity. Establishes project standards and ensures execution is undertaken under those standards.</p>	<p>Bachelor’s Degree from a four-year accredited college / university</p>	<p>10 years</p>	<p>An advanced degree may be substituted for a year of professional experience.</p> <p>Project Management Professional certification may be substituted for a year of professional experience.</p>



Labor Category	Responsibilities	Minimum Education	Minimum Experience	Substitution Methodology
Senior Functional Expert / Senior Director	Provides specialized performance management and improvement experience in conducting industry or technically specific analysis including, but limited to, education, real estate, healthcare, litigation support and dispute analysis, operational risk management, performance modeling and serves as a subject matter expert to the project team and project leadership. Advises our methodology, technical, industry and data standards, and coordinates analysis with other work streams as required.	Bachelor’s Degree from a four-year accredited college / university	10 years	An advanced degree may be substituted for a year of professional experience.  Project Management Professional certification may be substituted for a year of professional experience.
Functional Expert / Consultant II	Provides specialized experience in conducting industry or technically specific analysis including, but limited to, education, real estate, healthcare, litigation support and dispute analysis, operational risk management, technology management, performance modeling and serves as a subject matter expert to the project team and project leadership. Supports performance of work streams through conducting specific analysis and reporting based upon technical, industry and data standards, and coordinates analysis with other work streams as required.	Bachelor’s Degree from a four-year accredited college / university	6 years	An advanced degree may be substituted for a year of professional experience.  Project Management Professional certification may be substituted for a year of professional experience.
Manager I	Responsible for team activities under guidance from project leadership and may have responsibility for multiple workstreams or a single workstream as appropriate given the project’s technical approach, size and complexity. Interacts with clients, designs and executes project technical approaches and is responsible for project management consistent with standards set forth by project leadership including presentation of results and status information to project leadership and clients.	Bachelor’s Degree from a four-year accredited college / university	6 years	An advanced degree may be substituted for one year of experience.  Project Management Professional certification may be substituted for a year of professional experience.



Labor Category	Responsibilities	Minimum Education	Minimum Experience	Substitution Methodology
Senior Associate	Responsible for the leadership of a project workstream or technical area of a project including technical approach, execution and reporting in alignment with the overall project’s technical approach. Identifies operational, procurement or real estate solutions, recommendations and executes workplans as appropriate, supervises team members, involves senior team members as appropriate based upon subject matter expertise and experience appropriate to the technical approach and project complexity. Adheres to project management and other requirements set forth by project leadership.	Bachelor’s Degree from a four-year accredited college / university	5 years	An advanced degree may be substituted for a year of professional experience.  Project Management Professional certification may be substituted for a year of professional experience.
Associate	Responsibilities may include process analysis support, data analysis, participation in interviews, and analysis and associated documentation of results aligned with the project’s technical approach. An Associate may have responsibility to supervise analyst and staff resources based on project requirements and complexity.	Bachelor’s Degree from a four-year accredited college / university	3 years	An advanced degree may be substituted for one year of experience.  Project Management Professional certification may be substituted for a year of professional experience.
Analyst	Assists with setting up and maintaining the project management infrastructure including status reporting, project planning, risk and issue management, contractual management, man power reporting and other areas as necessary. Assists in data collection and data management, reporting to support project performance under the direction of leadership.	Bachelor’s degree from a four-year accredited college/university	1 year	An advanced degree may be substituted for one year of experience.  Project Management Professional certification may be substituted for a year of professional experience.

