



General Services Administration Federal Supply Service

Authorized Federal Supply Schedule PRICELIST Mission Oriented Business Integrated Services (MOBIS)

SIN 874-1 Integrated Consulting Services

Contract Number: GS-10F-0051S

Contract Period: 11/22/2010 – 11/21/2015

Business Size: Veteran-Owned Small Business

FSC Group: 874

Modification: PS-0002, 6/28/2010; PS-0003, 11/22/2010

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

TreMonti Consulting, LLC

2944 Hunter Mill Road, Suite 204

Oakton, VA 22124

(703) 352-1825 tel (703) 852-4350 fax

www.tremonticonsulting.com

POC: Gregory Sullivan, Partner

Gregsullivan@tremonticonsulting.com

TreMonti
CONSULTING



Table of Contents

Customer Information.....	2
TreMonti Consulting, LLC Overview.....	5
MOBIS Services	8
SIN 874-1, SIN 874-1RC Integrated Consulting Services	
Prices and Labor Categories.....	10
MOBIS Labor Rates & Labor Category Descriptions	

Customer Information

1a. Special Item Numbers:

SIN 874-1, SIN 874-1 RC Integrated Consulting Services

1b. Lowest priced model and lowest unit prices: Prices shown in pricelist are net.

1c. Labor Category Descriptions: See page 11.

2. Maximum Order: \$ 1 million. Orders exceeding the maximum order threshold may be placed in accordance with clause I-FSS-125, "Requirements Exceeding the Maximum Order (SEP 1999)."

3. Minimum Order: \$100

4. Geographic Coverage: Domestic only.

5. Points of Production: Fairfax, VA

6. Statement on Net Price: Prices shown in pricelist are net (discounts already deducted).

7. Quantity Discounts: None offered.

8. Prompt Payment Terms: Net 30, 0% discount

9a. Acceptance of Government purchase cards below micro-purchase threshold: TreMonti Consulting, LLC accepts Government Purchase Cards below the micro-purchase threshold.

9b. Acceptance of Government purchase cards above micro-purchase threshold: TreMonti Consulting, LLC is willing to accept Government Purchase Cards above the micro-purchase threshold.

10. Foreign Items: None

11a. Time of Delivery: To be negotiated per each delivery order between contracting agency and contractor.

11b. Expedited Delivery: To be negotiated per each delivery order between contracting agency and contractor.

- 11c. Overnight and Two-day Delivery:** N/A
- 11d. Urgent Requirements:** Contact TreMonti Consulting, LLC for urgent requirements.
- 12. F.O.B Points:** Destination
- 13a. Ordering Address:**
- TreMonti Consulting, LLC
2944 Hunter Mill Road, Suite 204
Oakton, VA 22124
Attn: Greg Sullivan, Managing Partner
Phone: (703) 352.1825
Fax: (703) 852.4350
gregsullivan@tremonticonsulting.com
- 13b. Ordering procedures:** For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA's) are found in Federal Acquisition Regulation (FAR) 8.405-3.
- 14. Payment Address:**
- TreMonti Consulting, LLC
2944 Hunter Mill Road, Suite 204
Oakton, VA 22124
Attn: Greg Sullivan, Managing Partner
Phone: (703) 352.1825
Fax: (703) 852.4350
gregsullivan@tremonticonsulting.com
- 15. Warranty Provision:** N/A
- 16. Export Packing Charges:** N/A
- 17. Terms and conditions of Government commercial credit card acceptance:** N/A
- 18. Terms and conditions of Government 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 price lists and any discount from list prices:** N/A

- 20a. Terms and conditions for any other services (if applicable).** N/A
- 21. List of service and distribution points:** N/A
- 22. List of participating dealers:** N/A
- 23. Preventive Maintenance:** N/A
- 24a. Environmental Attributes:** N/A
- 24b. Section 508 Compliance:** No.
- 25. Data Universal Number (DUNS):** 18-942-1493
- 26. Notification regarding registration in SAM database:** TreMonti Consulting, LLC is registered in the SAM database.

Corporate Overview

TreMonti Consulting, LLC

TreMonti Consulting, LLC (TreMonti) has extensive experience in providing advice and assistance to universities, governments and companies, regarding **intellectual asset management issues**. We have fully dedicated professionals with broad experience and in-depth knowledge in all sectors and disciplines relating to intellectual asset management. We utilize state-of-the-art tools and methods in the management and commercialization of a wide spectrum of intellectual property.



We have rendered advice on best practices in **technology transfer management and implementation**. We advise clients regarding software tools, organization structure, methodologies, IP management processes, spin-offs, joint ventures, licensing structure and practice, sale of intellectual property, and other issues relating to the management of technology transfer. We have assisted numerous clients in the management and implementation of their technology transfer processes.

Commercialization Assessments

Assessing and triaging disclosed technologies are fundamental challenges faced by every technology transfer office. It is a necessary step in making a decision whether or not to secure and continue IP protection. Since its inception TreMonti has provided its clients with thousands of commercial assessments. Every one of our assessments is unique to the technology being reviewed and to the client we are serving.

Critical elements

TreMonti's clients are typically looking for **three critical elements** from our assessment of their technology or invention:

- Does the technology or invention merit further investment at this stage of development?
- What is the commercial opportunity?
- Exactly who are the potential commercial partners that this technology should be marketed to and what is the value proposition?

These questions are best answered from people who have the industry and scientific expertise to understand our clients' technologies and industry requirements. TreMonti always hires the best people from industry, and this is truly what distinguishes us from our competition.

Small Office Services

TreMonti's Small Office Services program was created to meet the needs of institutions that are looking to initiate, manage, and grow their technology commercialization programs. Our full range of services focus on building the technology commercialization infrastructure at your institution, while at the same time looking for opportunities to increase the awareness of your researchers about intellectual property, technology transfer, and corporate sponsored research.

Our program is customized to meet the specific needs and goals of each of our clients. Each program is based on a fixed annual fee, enabling our clients to strategically plan the growth of their commercialization program while still staying well within their budgetary requirements.

Services in this program may include:

- Providing an overview of your intellectual property policy
- Assistance in setting up an appropriate suite of documents to facilitate sponsored research and licensing
- Review of existing disclosed technologies
- In reach to researchers and faculty providing education about the role of technology transfer in research
- Development of websites and other marketing tools
- Preparation of marketing materials
- Marketing of technologies
- Licensing assistance
- Invention disclosure portal

Comparable Transaction Assessment

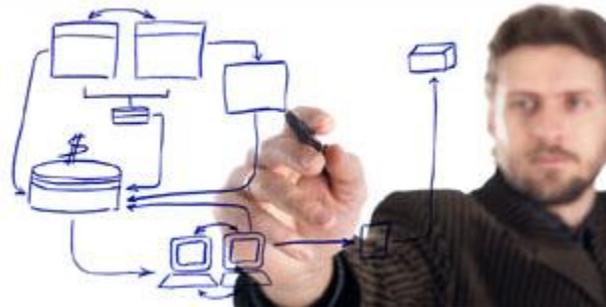
Valuation of technology is a skill. It is influenced by a wide range of factors including, current markets, trends, willing-to-pay, and comparable transactions within the industry.

TreMonti performs a comprehensive industry search to identify equivalent technology that has been sold or licensed. These “comps” or comparable transactions help to determine the value of a particular technology or patent. Our transaction assessment services are customized to meet your needs, goals, and budget, while providing the high degree of personal service for which TreMonti is known.

Technology Marketing

Marketing efforts are essential in finding and developing the commercial relationships needed to develop intellectual property and bring it to market. Moreover, a well constructed marketing program can also help in driving corporate recognition of your institution and its research capabilities, as well as sponsored research.

TreMonti’s marketing support provides a full suite of services designed to match your marketing efforts and goals, whether active or passive. We focus on identifying prospective commercialization partners, assisting in engaging the true buyer of the technology, and providing them with the right information needed for them to make an informed decision. A true buyer of a technology is the person within an organization that has the internal authority to acquire and develop it, such as a Chief Scientific Officer, a Chief Technical Officer, or a VP of Business Development.



Our marketing services are customized to meet your needs, goals, and budget, while providing the high degree of personal service for which TreMonti is known.

TreMonti services include:

- Website development
- Smartphone/tablet application (app) development
- Managing social media (LinkedIn, Facebook, Twitter, etc.)
- Drafting of non-confidential marketing materials for your technologies
- Creation of marketing materials that highlight your institution’s research capabilities
- Identification of potential commercial partners
- Active marketing of your technologies and capabilities to commercial partners
- Presentations at open houses and industry events

MOBIS Services

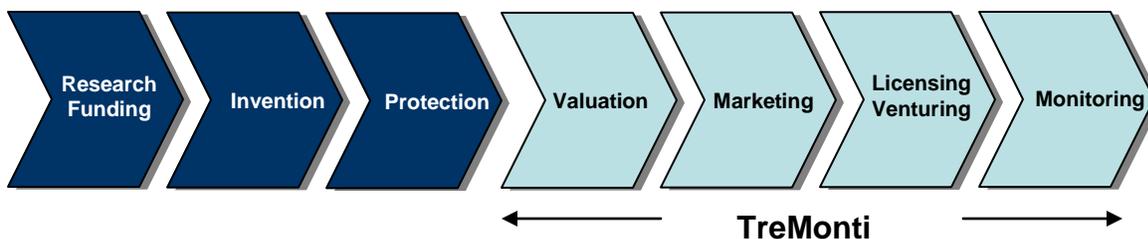
SIN 874-1, SIN 874-1RC: Integrated Consulting Services

TreMonti has a team of business and technology professionals, including an extensive network of industry and scientific experts, to service the unique needs of federal Technology Transfer Offices (TTO's). TreMonti's consultants have hands-on experience in managing intellectual property portfolios and a long track record of technology commercialization. We emphasize quantitative tools and performance measurements. Our methods are implemented by professionals with extensive global expertise in strategic planning and value creation, business process redesign, systems selection and implementation, change management, and valuation, among others.

In addition, TreMonti extensively employs a network of affiliated technical resources in all major technical and scientific fields. Our corporate practitioners and our many affiliates, have worldwide experience with hundreds of engagements pertaining to all aspects of technology commercialization and intellectual asset management. Whatever your needs, TreMonti's professionals share a common goal with you — to find solutions that make sense.

We employ a proven methodology for assessing the commercial viability of the technologies and identify potential prospective commercialization partners. The typical stages employed by TreMonti in the Technology Transfer process are illustrated in Figure 1 and directly address the requirements TTO's need to consider.

Technology Transfer Stages



Service	Purpose	Key Tasks
Technology Marketing	Develop high-level contracts in industry that are good targets as potential licensees.	<ul style="list-style-type: none"> • Identify potential partner/licensees • Contact potential licensees • Evaluate interest in the technology • Introduce companies with interest and resources
Regulatory Reporting	Help ensure compliance with federal invention reporting and other regulatory requirements.	<ul style="list-style-type: none"> • Review inventions developed with federal research funding • Determine the regulatory requirements that may apply • Conduct compliance review • Design and implement compliance systems to help ensure future compliance
Assessment and Valuation	Determine valuation and dynamics of technology and markets.	<ul style="list-style-type: none"> • Use academic and industry professionals to evaluate technologies and markets • Provide ranking of technologies in IP portfolio
Best Practices Assessment	Using best practices will improve licensing programs by focusing on generating the maximum economic benefit for the institution.	<ul style="list-style-type: none"> • Benchmark TTO with similar TTOs • Improve productivity to reduce cost per license • Design processes to make marketing efforts more successful • Provide greater assurance of the completeness, accuracy, timeliness, and predictability of licensing streams
License Strategy	Better knowledge of license options can result in better license agreements.	<ul style="list-style-type: none"> • Qualify individual companies • Determine licensing strategy considering the desires of all parties • Develop business plan • Facilitate negotiations/partnership formation
Information Systems	Reduce clerical errors and agreement ambiguity; improve process controls to increase revenues and TTO accountability.	<ul style="list-style-type: none"> • Design and install information systems to manage patent prosecution, license agreements, MTAs, CDAs, and royalty revenue accounting • Create Web-based technology transfer intranets to provide current information to management and researchers
License Monitoring	Audit licensees to help ensure reliability.	<ul style="list-style-type: none"> • Performs onsite audit of license records • Increase understanding of reliability of reporting systems in place at licensee

Figure 1. Technology Transfer Stages

Prices & Labor Categories

Labor Rates

MOBIS professional labor rates and labor category descriptions for the following SIN is shown below:

SIN 874-1, SIN 874-1 RC Integrated Consulting Services

Category	Price
Partner	\$199.10
Project Manager II	\$169.23
Project Manager I	\$149.32
Consultant III	\$129.41
Consultant II	\$99.55
Consultant I	\$79.63
Project Analyst I	\$49.77

Notes:

1. Prices offered to government represent a 5% discount off the commercial pricelist.
2. TreMonti Consulting, LLC acknowledges that the Service Contract Act (SCA) is applicable to this contract as it applies to the entire MOBIS 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 CRF 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.

Labor Category Descriptions

PARTNER

Functional Responsibility:

Responsible for all assurance and specialized services provided on an engagement and for ensuring that such services comply with the Firm's Client Service Standards, applicable professional standards, and the Firm's overall objective of professional excellence. Determines the nature, timing, and extent of procedures and ensures compliance with Firm policies and professional standards.

Substantial experience in managing the business issues associated with client requirements. Manages contractual relationship with agencies and departments through organizational and business improvement services. Authority to dedicate corporate resources to a client project. Participates in project staff and client meetings to resolve issues through senior personnel with own subject matter expertise gained through industry leadership and other projects. Capable of negotiating and making binding decisions for the company.

Typical Position Qualifications:

Bachelor's degree – advanced degree preferred but not required – with a minimum of 15 years experience in management, business consulting and/or licensing, commercialization, sourcing and surveillance of intellectual property.

PROJECT MANAGER II

Provides leadership and authority to the development of large program initiatives. Responsible for the management and supervision of the engagement team, on-site quality control, review and approval of working papers and findings, adherence to applicable standards, report review, and assisting the partner in the development of the overall engagement approach. Facilitates understanding across wide range of disciplines and program stakeholders. Gains agreement at top executive levels for direction and/or re-direction of costly resources.

Manages the day-to-day operations of the project. Defines project approach, methods and staffing. Prepares project estimates and work plans using company experience on prior projects and the proprietary company methods and tools for planning and estimating projects. Prepares and presents project status reports to company and client management. Resolves project staffing and planning issues. Conducts preliminary quality assurance over project deliverables and project activities.

Typical Position Qualifications:

Bachelor's degree – advanced degree preferred but not required – typically with a minimum of 10 years experience in management, business consulting and/or intellectual property management.

PROJECT MANAGER I

Responsible for generally the same as Project Manager II except for less complex engagements or assigned tasks. Manages the contractual relationship with clients and oversees several projects at the programmatic level. Meets and confers with client regarding the status of specific program and management activities and problems, issues or conflicts regarding resolution. Conducts quality assurance over key project deliverables. Resolves issues with staff, tools and methods. Conducts and or participates in project staff meetings and client meetings to resolve issues through application of company resources or experiences gained on other projects.

Typical Position Qualifications:

Bachelor's degree – advanced degree preferred but not required – typically with a minimum of 8 years experience in management, business consulting and/or intellectual property management.

CONSULTANT III

Participates in the planning of the project engagement and is responsible for the completion of all aspects of the project that are delegated by the partner or project managers. Extensive specialized knowledge of business issues related to commercialization and licensing of intellectual property and technology transfer management or specialized experience in business best practices and/or the management of complex business change. Applies knowledge of industry best practices, business process transformation, or commercialization methods.

Provides subject matter knowledge to junior project team members and client contacts. Prepares, individually or with others, functional deliverables. Transfers functional knowledge to client team members and/or other appropriate client contacts. Works with the project manager to allocate staffing and resolve business issues.

Typical Position Qualifications:

Bachelor's degree – advanced business or technology-related degree or certification credentials preferred but not required – typically with a minimum of 6 years experience in management, business and/or consulting environment.

CONSULTANT II

Experience in analysis of business or functional issues. Experience analyzing proposed system or process modifications and identifying and designing alternate functional or business solutions. Provides business process perspectives. Conducts or participates in requirements analysis sessions. Advises on business and management improvement issues. Prepares, individually or with others, functional deliverables. Transfers functional knowledge to client team members and/or other appropriate client contacts. Performs under the supervision and review of a more experienced professional.

Typical Position Qualifications:

Bachelor's degree – advanced degree preferred but not required – typically with a minimum of 5 years experience in business and/or consulting environment.

CONSULTANT I

Responsible for business and technical execution of small to medium-size complex projects. Interacts with customer on technical issues. Experience in current business or functional issues and performs successfully in a team environment. Supports senior business and management process teams across a variety of issues. Performs surveys, conducts research, prepares deliverables related to business and functional support tasks. Prepares, individually or with others, functional deliverables. Transfers functional knowledge to client team members and/or other appropriate client contacts.

Typical Position Qualifications:

Bachelor's degree – advanced degree preferred but not required – typically with a minimum of 3 years experience in business and/or consulting environment.

PROJECT ANALYST I

Under general supervision, assists in formulating and defining business processes to include systems analysis and objectives through research and fact-finding combined with a basic understanding of business transformation processes and industry requirements. Includes analysis of business and user needs; organizational resources; products and services; operational and management processes. May also produce and document requirements and or findings.

Typical Position Qualifications:

Bachelor's degree - and 3 years of relevant experience.