



## **GENERAL SERVICES ADMINISTRATION**

**Federal Supply Service  
Authorized Federal Supply Schedule Price List**

### **MANAGEMENT, ORGANIZATIONAL AND BUSINESS IMPROVEMENT SERVICES (MOBIS)**

**Federal Supply Group 8744      NAICS 541611**

**Contract Number: GS-10F-0289R  
Contract Period: April 21, 2005 through April 20, 2010**

*For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at [fss.gsa.gov](http://fss.gsa.gov).*

# **Hewitt**

**HEWITT ASSOCIATES LLC  
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**[www.hewitt.com/federalconsulting](http://www.hewitt.com/federalconsulting)**

**Contract Administration Source: Ed Flynn  
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Business size: Large

*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 GSA Advantage! is [GSAAdvantage.gov](http://GSAAdvantage.gov).*

## CUSTOMER INFORMATION:

- 1a. Table of awarded special item number(s) with appropriate cross-reference to item descriptions and awarded price(s).

### SIN 874-1: CONSULTING SERVICES

Contractors shall provide expert advice, assistance, guidance or counseling in support of agencies' management, organizational and business improvement efforts. This may also include studies, analyses and reports documenting any proposed developmental, consultative or implementation efforts. Examples of consultation include but are not limited to:

- strategic, business and action planning
- systems alignment
- cycle time
- high performance work
- leadership systems
- performance measures and indicators
- process and productivity improvement
- organizational assessments
- program audits, and evaluations

### SIN 874-3: SURVEY SERVICES

Contractors shall provide expert consultation, assistance, and deliverables associated with all aspects of surveying within the context of MOBIS. Contractors shall assist with, and/or perform all phases of the survey process to include, but not limited to:

- planning survey design
- defining and refining the agenda
- determining proper survey data collection methodology
- sampling; survey development
- survey database administration
- administering surveys using various types of data collection methods
- pretest/pilot surveying
- assessing reliability and validity of data
- analyses of quantitative and qualitative survey data
- Production of reports to include, 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 non-response; and briefings of results to include discussion of recommendations and potential follow-up actions

### SIN 874-6: PRIVATIZATION SUPPORT SERVICES AND DOCUMENTATION (A-76)

Contractors shall provide expert advice, consultation, assistance, and documentation in support of studies conducted under OMB Circular A-76 or other privatization or commercial activities studies, projects, or efforts. These services may include, but are not limited to:

- strategic, tactical, and operational level planning support
- comparison of in-house bids to proposed Interservice Support Agreement (ISSA) prices;
- initial study planning
- assessments and or studies of potential privatization initiatives
- development of Quality Assurance Surveillance Plans (QASP);
- performance of management studies to determine the Government's Most Efficient Organization (MEO)
- administrative appeal process support
- development of in-house Government cost estimates
- development of Performance Work Statements (PWS)
- public-private partnership support

**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. **See Pricing Section**

**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. **See Pricing Section**

**2.** Maximum order:

\$1,000,000.00

**3.** Minimum order:

\$300.00

**4.** Geographic coverage (delivery area).

The 48 contiguous states, Alaska, Hawaii, Puerto Rico, Washington DC and U.S. Territories.

**5.** Point(s) of production (city, county, and State or foreign country).

Falls Church, Arlington County, Virginia  
Lincolnshire. Lake County, Illinois

**6.** Discount from list prices or statement of net price.

Government net prices (discounts already deducted)

**7.** Quantity discounts.

None offered

**8.** Prompt payment terms.

None Offered

**9a.** Notification that Government purchase cards are accepted at or below the micro-purchase threshold.

Yes

**9b.** Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold.

Hewitt Associates LLC will not accept purchase cards over \$2,500.00

**10.** Foreign items (list items by country of origin).

None

**11a.** Time of delivery. (Contractor insert number of days.)

As specified on the Task Order

**11.b** Expedited Delivery.

Contact Hewitt Associates LLC

- 11c.** Overnight and 2-day delivery:  
Contact Hewitt Associates LLC
- 11d.** Urgent Requirements:  
Contact Hewitt Associates LLC
- 12.** F.O.B. point(s).  
Destination
- 13a.** Ordering address(es).  
Ed Flynn,  
Hewitt Associates LLC  
2941 Fairview Park Drive  
Falls Church, VA 22042-4514
- 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)  
Hewitt Associates LLC  
P.O. Box 95135  
Chicago, IL 60694
- 15.** Warranty provision  
Hewitt Associate LLC's standard commercial warranty
- 16.** Export Packing Charges (if applicable)  
Not Applicable
- 17.** Terms and Conditions of Government purchase card acceptance (any thresholds above the micro-purchase level)  
Not Applicable.
- 18.** Terms and conditions of rental, maintenance and repair (if applicable)  
Not Applicable
- 19.** Terms and conditions of installation (if applicable)  
Not Applicable
- 20.** Terms and conditions of repair parts indicating date of parts lists and any discounts from list prices (if applicable)  
Not Applicable
- 20a** Terms and conditions for any other services (if applicable)  
Not Applicable

21. List of service and distribution points (if applicable)  
Not Applicable
22. List of participating dealers (if applicable)  
Not Applicable
23. Preventive maintenance (if applicable)  
Not Applicable
- 24a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants (if applicable)  
Not Applicable
- 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. contractors web site or other location. The EIT standards can be found at: [www.Section508.gov/](http://www.Section508.gov/)  
Not Applicable
25. Data Universal Numbering Systems (DUNS) number:  
06-799-9979
26. Notification regarding registration in Central contractors Registration (CCR) database:  
Hewitt Associates LLC is registered in the CCR.

### Labor category Descriptions

Labor Category	Experience	Education	Summary Job Description
HM Assistant	4 years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Provide technical assistance to project teams in:</p> <ul style="list-style-type: none"> <li>• FAS 106/112 claim cost development</li> <li>• IBNR reserve development</li> <li>• Participate in financial calculations</li> <li>• Assist in health care budget rate setting for self-insured plans, including gathering claims data</li> <li>• Assist in developing employee contribution rates</li> <li>• Analyze insure plan renewals for appropriateness and carrier bid financial analysis</li> <li>• Conduct health and welfare budget tracking</li> <li>• Act as technical methodology expert for HHVI/review rates</li> <li>• Financial modeling of plan design alternatives</li> <li>• Supply information to complete 5500 filings</li> <li>• Work with clients to develop relevant cost measures</li> <li>• Develop models to evaluate cost-saving scenarios</li> </ul>

Labor Category	Experience	Education	Summary Job Description
HM Actuary	6 years	BA/BS plus Fully Qualified Actuary (FSA)	<p><b>Key Responsibilities / Activities include:</b></p> <p>Independently interface with clients on complex projects to:</p> <ul style="list-style-type: none"> <li>• Lead financial calculations</li> <li>• Independently conduct or participate in strategy development and costing scenarios for clients</li> <li>• Identify/develop relevant cost measures and budgetary goals for clients</li> <li>• Evolve benchmarking strategy for clients</li> <li>• Assist in HMO negotiation calls and meetings and lead as needed</li> <li>• Review health care budget rate setting for self-insured plans</li> <li>• Review employee contribution rate development</li> <li>• Experienced incumbents (FSA) will mentor more junior team members and review their work, and</li> <li>• Oversee or conduct analysis of insured plan renewals for appropriateness and carrier bid financial analysis</li> </ul>
HM Analyst	3 years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Under leadership of more senior team members, execute the following:</p> <ul style="list-style-type: none"> <li>• Assist in creating RFPs for clients</li> <li>• Gather, manipulate, and summarize data—either for renewals or pricing</li> <li>• Gather data and enter into summary spreadsheets</li> <li>• Analyze and trend statistical data</li> <li>• Provide recommendations and develop action plan for administrative improvements</li> <li>• Assist with carrier negotiations</li> <li>• Perform vendor management, including carrier follow-up</li> <li>• Conduct service area analysis and reporting, and provider disruptions analysis</li> <li>• Assist in gathering data for pricing projects</li> <li>• Perform data analysis and basic financial analysis</li> </ul>
HM Consultant	6 years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>On a task level basis, leads or executes as follows on technical projects:</p> <ul style="list-style-type: none"> <li>• Perform financial oversight of projects or sub-projects</li> <li>• Coordinate information and interaction with client and administrator</li> <li>• Evaluate accuracy of medical, dental, prescription drug, and mental health/substance abuse claim handling</li> <li>• Lead or assist in strategy and design consulting for benefit strategy, plan design, pricing strategy, bid/selection projects, and health plan management</li> <li>• Conduct client and vendor follow-up and issue resolution</li> <li>• Lead operational assessment meetings at health plan service facilities</li> <li>• Evaluate quality of administrator plan management services</li> <li>• Handle contract and performance guarantee negotiation and implementation</li> <li>• Conduct vendor selection and analysis</li> </ul>

Labor Category	Experience	Education	Summary Job Description
HM Senior Consultant	15+ years	BA/BS and advanced degree or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Oversees HM projects, accountable for success of projects as follows:</p> <ul style="list-style-type: none"> <li>• Provide leadership for large, complex projects with full accountability for project success</li> <li>• Perform complex project management and manage financial oversight for projects</li> <li>• Perform deep subject matter expertise and advanced strategy and design consulting on benefit strategy, goal setting, benchmarking, plan design, pricing strategy, bid/selection projects, and health plan management projects</li> <li>• Lead vendor negotiations</li> <li>• Proactively seek out industry and market intelligence and provide thought leadership on topics relevant to clients</li> <li>• Provide strategic health care advice to clients</li> <li>• Mentor and develop staff</li> <li>• Analyze health plan performance/administration</li> <li>• Lead vendor and client follow-up and issue resolution</li> <li>• Conduct vendor selection and analysis</li> <li>• Perform staff planning</li> </ul>
RFM Analyst	3years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Provides RFM technical assistance and analysis on project teams including:</p> <ul style="list-style-type: none"> <li>• Receives, edits, and processes data received from clients</li> <li>• Validates, reconciles and documents data</li> <li>• Calculates benefits due to participants/members based on plan documents</li> <li>• Updates and edits electronic spreadsheets for benefit calculations</li> <li>• Produces personalized benefit statements</li> <li>• Updates and edits electronic spreadsheets for analysis and valuations</li> <li>• Assists in preparation of valuation reports</li> <li>• Assists in the preparation of government filings</li> </ul>
RFM Assistant Consultant	3 years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Under direction of more senior team members, executes on the following for technical RFM projects:</p> <ul style="list-style-type: none"> <li>• Directs client questions to the appropriate team member as needed</li> <li>• Validates and reconcile participant/member data</li> <li>• Updates valuation runs for minor changes</li> <li>• Performs basic pension benefit calculations</li> <li>• Drafts basic responses to client queries</li> <li>• Provides assistance to others on all basic and some more complex pensions related work</li> </ul>

Labor Category	Experience	Education	Summary Job Description
RFM Consultant	8 years	BA/BS, plus Fully Qualified Actuary (FSA or EA )plus advanced degree or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Independently executes on complex RFM projects as follows:</p> <ul style="list-style-type: none"> <li>• Manages complex to routine projects, with modest oversight from a more experienced consultant on complex projects.</li> <li>• Calculates contributions necessary to fund defined benefit pension plans</li> <li>• Calculates annual accounting expenses necessary for post retirement and termination benefits</li> <li>• Prepares client meeting materials and participates in client meetings</li> <li>• Coaches and trains newer consultants</li> <li>• Works collaboratively with consultants from other lines of business</li> <li>• Project manages less experienced team members on valuations or other complex/longer term projects and insures quality by reviewing work product and applying technical expertise (through research and interpretation)</li> </ul>
RFM Consultant Advanced	10 years	BA/BS, Fully Qualified Actuary (FSA or EA) plus advanced degree or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Primary client interface and lead for complex projects, including:</p> <ul style="list-style-type: none"> <li>• Manages large complex projects with little oversight</li> <li>• Manages the client relationship, including strategic thinking and problem-solving</li> <li>• Leads non-routine client meetings (i.e. discussions on mergers &amp; acquisitions or plan design)</li> <li>• Leveraged through delegating, training, and coaching less experienced consultants</li> </ul>
RFM Lead Consultant	15 or more years	BA/BS, Fully Qualified Actuary (FSA or EA), advanced degree or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Oversees multiple large projects for RFM, overall accountability for engagement success as follows:</p> <ul style="list-style-type: none"> <li>• Leads the RFM client relationship on multiple large clients</li> <li>• Manages the client relationship(s), team(s) and assignment(s) in an oversight/review /quality assurance capacity</li> <li>• Communicates effectively in client situations (Board of Directors, HR Lead, Finance Lead, etc.)</li> <li>• Teams with other consultant(s) on strategic issues or on large opportunities</li> <li>• Manages a large portion of the client portfolio and/or associate population</li> <li>• Provide deep subject matter expertise to project</li> </ul>

Labor Category	Experience	Education	Summary Job Description
Design (TOC) Consultant Entry	3 years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Under supervision, execute on design project tasks assisting the team as follows:</p> <ul style="list-style-type: none"> <li>• Assist in data collection, as-is analysis, and synthesis of information</li> <li>• Interface with clients to verify data and findings</li> <li>• Participate in managing components of projects</li> <li>• Contribute to qualitative and/or qualitative assessment of current state</li> <li>• Participate in designing, modifying, and implementing client solutions</li> <li>• Participate in presenting and delivering results and solutions</li> </ul>
TOC Consultant Experienced	10 years	BA/BS and advanced degree or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Depending on project size, either lead or provide leadership on small to large projects as follows:</p> <ul style="list-style-type: none"> <li>• Lead small to medium projects and manage project budgets</li> <li>• Plan and organize project activities for projects of all sizes</li> <li>• Participate in data gathering and fact finding for the client</li> <li>• Contribute to the qualitative and/or qualitative assessment of client's current state</li> <li>• Design preliminary client solutions for review and further refinement</li> <li>• Participate in developing implementation strategies and implementing solutions</li> <li>• Create client deliverables including reports involving interpreting and presenting results to clients</li> <li>• Conduct complex research and perform quantitative and qualitative studies using various tools</li> <li>• Provide direction to more junior consultants</li> </ul>
TOC Consultant Advanced	15 or more years	BA/BS, advanced degree or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Oversee and be accountable for multiple design projects for practice, including for multiple clients, as follows:</p> <ul style="list-style-type: none"> <li>• Develop overall approach, lead strategy portions of the engagement, review and direct the work of others</li> <li>• Manage mid size to large and more complex projects and multiple projects concurrently</li> <li>• Provide deep subject matter expertise to define and design client solutions and develop implementation strategy</li> <li>• Contribute to or lead information gathering and fact finding</li> <li>• Contribute to and lead qualitative and/or quantitative assessment of client's current state</li> <li>• Leverage the efforts of more junior consultants</li> <li>• Set high standards and hold team members accountable for results for the client</li> </ul>

Labor Category	Experience	Education	Summary Job Description
Communications & Training Consultant Entry	2 years	BA/BS or equivalent work experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Under direction of more senior team members, on communications and training projects execute on the following:</p> <ul style="list-style-type: none"> <li>• Developing practice knowledge;</li> <li>• Practice product/service strategy and thought leadership;</li> <li>• Technological practice functionality and techniques;</li> <li>• Development of best practices;</li> <li>• Resource management across multiple client teams;</li> <li>• Under supervision, contribute to training and communications design and delivery</li> <li>• Delivery model development; and</li> <li>• Integration with other practice services</li> </ul>
Communications & Training Consultant Experienced	8 years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>On large, complex multi-disciplinary projects perform independently as follows:</p> <ul style="list-style-type: none"> <li>• Aligned with a core service (delivery, training, communications, etc.);</li> <li>• Overall execution of implementation activities;</li> <li>• Implementation team staffing and composition;</li> <li>• Leads overall requirements process;</li> <li>• Primary client contact during implementation;</li> <li>• Service knowledge expert;</li> <li>• Develop and deliver communications and training programs;</li> <li>• Integrates and manages across development and testing; and</li> <li>• Works with Ongoing Project Manager to transition to ongoing services from implementation</li> </ul>
Communications & Training Consultant Advanced	10 years	BA/BS and advanced degree or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Lead large communications and training projects as follows:</p> <ul style="list-style-type: none"> <li>• Plan, organize and control project and serve as prime interface to client;</li> <li>• Provide deep subject matter expertise to project</li> <li>• Aligned with a core service (delivery, training, communications, etc.);</li> <li>• Leads system requirements meetings;</li> <li>• Manages system development and configuration;</li> <li>• Develop and deliver communications and training programs;</li> <li>• Translates requirements into system specifications;</li> <li>• Primary lead for system integration development and testing;</li> <li>• Acts as a liaison between system developers and testing team; and</li> <li>• Manages system setup and programmer analyst</li> </ul>

Labor Category	Experience	Education	Summary Job Description
Systems Analyst Advanced	6 years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Provide technical expertise and leadership to project team as follows:</p> <ul style="list-style-type: none"> <li>• Lead systems requirements definition process</li> <li>• Oversee system setup during implementation</li> <li>• Manages system team during implementation</li> <li>• Liaison to Subject Matter Experts as needed</li> <li>• Identify the impact of other group activities on systems/technology</li> <li>• Participate in client leadership team responsibilities</li> <li>• Report technical project status and lead sub-team status meetings</li> <li>• Ensure appropriate change management procedures and ensure involvement of Quality Assurance</li> <li>• Manage the system team and resources</li> <li>• Develop team members</li> </ul>
Quality Assurance Manager	6 years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Provide technical and quality assurance expertise to projects that include a technology component as follows:</p> <ul style="list-style-type: none"> <li>• Leads quality requirements meetings;</li> <li>• Manages testing process;</li> <li>• Adherence to testing methodologies and SOPs;</li> <li>• Status and resolution issues during setup and implementations;</li> <li>• Ensures systems and process meet requirements;</li> <li>• Reviews and approves test plans and test results;</li> <li>• Leads testing status meetings; and</li> <li>• Expert resource on plans, systems, and quality assurance</li> </ul>
Systems Analyst Entry	2 years	BA/BS or equivalent experience	<p><b>Key Responsibilities / Activities include:</b></p> <p>Under the direction of more senior team members, executes on projects tasks as follows:</p> <ul style="list-style-type: none"> <li>• Translates requirements into system configuration specifications;</li> <li>• System setup and configuration for implementations;</li> <li>• Gathers requirements for custom system development;</li> <li>• Interface requirements development;</li> <li>• Production schedule requirements setup;</li> <li>• Unit testing review; and</li> <li>• Issue research and resolution</li> </ul>

## LABOR RATES

Labor Category	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5
Health Management (HM) Assistant	\$252	\$262	\$272	\$282	\$293
HM Actuary	\$351	\$364	\$378	\$393	\$407
HM Analyst	\$194	\$201	\$209	\$217	\$225
HM Consultant	\$292	\$303	\$315	\$327	\$339
HM Senior Consultant	\$484	\$502	\$521	\$541	\$562
Retirement/Financial Management (RFM) Analyst	\$222	\$230	\$239	\$248	\$258
RFM Assistant Consultant	\$272	\$282	\$293	\$304	\$316
RFM Consultant	\$327	\$339	\$352	\$366	\$380
RFM Consultant Advanced	\$373	\$387	\$402	\$417	\$433
RFM Lead Consultant	\$484	\$502	\$521	\$541	\$562
Compensation/HR Design (TOC) Consultant Entry	\$210	\$218	\$226	\$235	\$244
TOC Consultant Experienced	\$348	\$361	\$375	\$389	\$404
TOC Consultant Advanced	\$484	\$502	\$521	\$541	\$562
Communications Consultant Entry	\$191	\$198	\$206	\$214	\$222
Communications Consultant Experienced	\$287	\$298	\$309	\$321	\$333
Communications Consultant Advanced	\$373	\$387	\$402	\$417	\$433
Systems Analyst Advanced	\$237	\$246	\$255	\$265	\$275
Quality Assurance Manager	\$217	\$225	\$234	\$243	\$252
Systems Analyst Entry	\$168	\$174	\$181	\$188	\$195