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

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

Multiple Award Schedule (MAS)
Federal Supply Group: Professional Services

Contract Number: GS-10F-0586N

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

Contract Period: September 10, 2018 – September 9, 2023

Optimal Solutions Group, LLC
5825 University Research Court, Suite 1100
College Park, MD 20740-3822
Telephone: (301) 306-1170
Fax: (301) 306-1170
www.OptimalSolutionsGroup.com

Business Size/Status: Small Disadvantaged Business

Prices shown herein are NET (discount deducted).

Pricelist current through Modification # PA-0032, effective April 12, 2021
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GENERAL CONTRACT INFORMATION

1a. Table of Awarded Special Item Numbers (SINs):
   SIN 541611: Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services
   SIN OLM: Order-Level Materials (OLM)

Please refer to Page #4 for a more detailed description

1b. Lowest Priced Model Number and Lowest Price:
   Please refer to our rates on Page #15

1c. Labor Category Descriptions:
   Please refer to Page #9

2. Maximum Order: $1,000,000.00

3. Minimum Order: $100.00

4. Geographic Coverage: Domestic and Overseas Delivery

5. Point of Production: UMD Discovery District, College Park, MD

6. Discount from List Price: All Prices Herein are Net

7. Quantity Discounts: Not Applicable

8. Prompt Payment Terms:
   Net 30 days
   Information for Ordering Offices: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.

9. Foreign Items: None

10a. Time of Delivery: Negotiated with Ordering Agency per Task Order

10b. Expedited Delivery: Contact Contractor for availability

10c. Overnight and 2-Day Delivery: Contact Contractor for availability

10d. Urgent Requirement: Contact Contractor for availability

11. F.O.B. Point: Destination

12a. Ordering Address: Optimal Solutions Group, LLC
   Attn: GSA Orders
   5825 University Research Court, Suite 1100
   College Park, MD 20740
   procurement@optimalsolutionsgroup.com

12b. For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs), are found in Federal Acquisition Regulation (FAR) 8.405-3.

13. Payment Address: Optimal Solutions Group, LLC
   Attn: Accounts Receivable
   5825 University Research Court, Suite 1100
   College Park, MD 20740-3822

14. Warranty Provision: Same as Commercial Warranty
15. Export Packing Charges, if applicable: Not Applicable
16. Terms and conditions of rental, maintenance, and repair: Not Applicable
17. Terms and conditions of installation (if applicable): Not Applicable
18a. Terms and conditions of repair parts indicating date of parts, price lists and any discounts from list prices: Not Applicable
18b. Terms and conditions for any other services (if applicable): Not Applicable
19. List of service and distribution points (if applicable): Not Applicable
20. List of participating dealers (if applicable): Not Applicable
21. Preventative maintenance (if applicable): Not Applicable
22a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants): Not Applicable
22b. 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/ Contact Contract Administrator for more information.
23. Data Universal Number System (DUNS) Number: 124021077
24. Notification Regarding Registration in System for Award Management (SAM) Database: Optimal Solutions Group, LLC is registered in the System Award Management (SAM) database.
CONTRACT OVERVIEW

GSA awarded Optimal Solutions Group, LLC a GSA Federal Supply Schedule contract for Multiple Award Schedule (MAS), Contract Number GS-10F-0586N. GSA has exercised Option Period 3 from September 10, 2018 – September 9, 2023. The contract allows for the placement of Firm Fixed Price or Time and Materials task orders using the labor categories and ceiling rates defined in the contract.

CONTRACT ADMINISTRATORS

Tracye Turner, Executive Vice President and COO
Optimal Solutions Group LLC
5825 University Research Court, Suite 1100
College Park, MD 20740
Telephone: (301) 306-1170
Fax Number: (301) 306-1170
Email: procurement@optimalsolutionsgroup.com

Mark Turner, Ph.D, President and CEO
Optimal Solutions Group LLC
5825 University Research Court, Suite 1100
College Park, MD 20740
Telephone: (301) 306-1170
Fax Number: (301) 306-1170
Email: contracts@optimalsolutionsgroup.com

BRIEF COMPANY OVERVIEW

Optimal helps its clients find the optimal policies, programs, and projects through the valuation of program impacts against program costs. Cost-benefit analysis helps decision-makers assess the economic and social benefits and costs of a program, facilitating better decision-making. Optimal's analysis services are particularly useful when cost-efficiency is of central interest, and when indirect costs and benefits are involved. Optimal's rigorous studies constitute an important part of our program evaluations in both the public and private sectors.

Optimal is a small, minority-owned economic and policy analysis research and consulting firm with offices in the Baltimore-Annapolis-Washington, DC area. Optimal is committed to supplying insightful program and policy evaluation, cost-benefit and effectiveness analyses, custom econometric modeling, and market analyses for decision makers in both the public and private sectors. Optimal does work for government at the federal, state, and local level, and works with nonprofits and commercial businesses as well.
CONTRACT USE

This contract is available for use by all federal government agencies, as a source for Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services for worldwide use. Executive agencies, other Federal agencies, mixed-ownership Government corporations, and the District of Columbia; government contractors authorized in writing by a Federal agency pursuant to 48 CFR 51.1; and other activities and organizations authorized by statute or regulation to use GSA as a source of supply may use this contract. Additionally, contractors are encouraged to accept orders received from activities within the Executive Branch of the Federal Government.

CONTRACT SCOPE

The contractor shall provide all resources including personnel, management, supplies, services, materials, equipment, facilities and transportation necessary to provide a wide range of professional services as specified in each task order. Services specified in a task order may be performed at the contractor’s facilities or the ordering agencies’ facilities. The government will determine the contractor’s compensation by any of several different methods (to be specified at the task order level) e.g., a firm-fixed price for services with or without incentives, labor hours or time-and-material.

The Special Item Number (SINs) available under this contract provide services across the full life cycle of a project. When task orders are placed, they must identify the SIN under which the task is being executed. Optimal Solutions Group, LLC has been awarded a contract by GSA to provide services under the following SIN

a. SIN 541611: Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services
b. SIN OLM: Order-Level Materials (OLM)

SPECIAL ITEM NUMBER (SIN) DESCRIPTION

SIN 541611 - Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services

Optimal Solutions Group, LLC provides expert advice, assistance, guidance or counseling in support of an agency's mission-oriented business functions. Services covered by this SIN include:

- Management or strategy consulting, including research, evaluations, studies, analyses, scenarios/simulations, reports, business policy and regulation development assistance, strategy formulation, and expert witness services
- Facilitation and related decision support services
- Survey services, using a variety of methodologies, including survey planning, design, and development; survey administration; data validation and analysis; reporting, and stakeholder briefings
- Advisory and assistance services in accordance with FAR 37.203
INSTRUCTIONS FOR PLACING ORDERS FOR SERVICES BASED ON GSA SCHEDULE HOURLY RATES

GSA provides a streamlined, efficient process for ordering the services you need. GSA has already determined that Optimal Solutions Group, LLC meets the technical requirements and that our prices offered are fair and reasonable. Agencies may use written orders; facsimile orders, credit card orders, blanket purchase agreement orders or individual purchase orders under this contract.

If it is determined that your agency needs an outside source to provide services, follow these simple steps:

Step 1. Develop a Statement of Work (SOW)

In the SOW, include the following information:

- Work to be performed,
- Location of work,
- Period of performance;
- Deliverable schedule, and
- Special standards and any special requirements, where applicable.

Step 2. Select Contractor and Place Order

- If the order is at or below the micro-purchase threshold, select the contractor best suited for your needs and place the order.
- If the order is exceeding the micro-purchase threshold, but less than the maximum order threshold (MOT), prepare an RFQ;
- If the order is in excess of the MOT, prepare an RFQ. Consider expansion of competition and seek price reductions.

Step 3. Prepare a Request for Quote (RFQ)

- Include the SOW and evaluation criteria;
- Request fixed price, ceiling price, or, if not possible, labor hour or time and materials order;
- If preferred, request a performance plan from contractors and information on past experience; and include information on the basis for selection.
- May be posted on GSA’s electronic RFQ system, e-Buy

Step 4. Provide RFQ to at least Three Firms

Step 5. Evaluate Offers, Select Best Value Firm, and Place Order
REQUIREMENTS EXCEEDING THE MAXIMUM ORDER

In accordance with FAR 8.404, before placing an order that exceeds the maximum order threshold, ordering offices shall:

- Review additional schedule contractors’ catalogs/price lists or use the “GSA Advantage!” on-line shopping service;
- Based upon the initial evaluation, generally seek price reductions from the schedule contractor(s) appearing to provide the best value (considering price and other factors); and
- After price reductions have been sought, place the order with the schedule contractor that provides the best value and results in the lowest overall cost alternative (see FAR 8.404(a)). If further price reductions are not offered, an order may still be placed, if the ordering office determines that it is appropriate.

Vendors may:

Offer a new lower price for this requirement (the Price Reduction clause is not applicable to orders placed over the maximum order in FAR 52.216-19 Order Limitations.)

- Offer the lowest price available under the contract; or
- Decline the order (orders must be returned in accordance with FAR 52.216-19).

A task order that exceeds the maximum order may be placed with the Contractor selected in accordance with FAR 8.404. The order will be placed under the contract.

Sales for orders that exceed the Maximum Order shall be reported in accordance with GSAR 552.238-74.

BLANKET PURCHASE AGREEMENT

Ordering activities may establish BPAs under any schedule contract to fill repetitive needs for supplies or services. BPAs may be established with one or more schedule contractors. The number of BPAs to be established is within the discretion of the ordering activity establishing the BPAs and should be based on a strategy that is expected to maximize the effectiveness of the BPA(s). In determining how many BPAs to establish, consider:

- The scope and complexity of the requirement(s);
- The need to periodically compare multiple technical approaches or prices;
- The administrative costs of BPAs; and
- The technical qualifications of the schedule contractor(s).

Establishment of a single BPA, or multiple BPAs, shall be made using the same procedures outlined in 8.405-1 or 8.405-2. BPAs shall address the frequency of ordering, invoicing, discounts, requirements (e.g. estimated quantities, work to be performed), delivery locations, and time.
When establishing multiple BPAs, the ordering activity shall specify the procedures for placing orders under the BPAs.

Establishment of a multi-agency BPA against a Federal Supply Schedule contract is permitted if the multi-agency BPA identifies the participating agencies and their estimated requirements at the time the BPA is established.

Ordering from BPAs:

Single BPA. If the ordering activity establishes one BPA, authorized users may place the order directly under the established BPA when the need for the supply or service arises.

Multiple BPAs. If the ordering activity establishes multiple BPAs, before placing an order exceeding the micro-purchase threshold, the ordering activity shall:

- Forward the requirement, or statement of work and the evaluation criteria, to an appropriate number of BPA holders, as established in the BPA ordering procedures; and
- Evaluate the responses received, make a best value determination (see 8.404(d)), and place the order with the BPA holder that represents the best value.

BPAs for hourly rate services. If the BPA is for hourly rate services, the ordering activity shall develop a statement of work for requirements covered by the BPA. All orders under the BPA shall specify a price for the performance of the tasks identified in the statement of work.

Duration of BPAs generally should not exceed five years in length, but may do so to meet program requirements. Contractors may be awarded BPAs that extend beyond the current term of their GSA Schedule contract, so long as there are option periods in their GSA Schedule contract that, if exercised, will cover the BPA’s period of performance.

Review of BPAs:

The ordering activity that established the BPA shall review it at least once a year to determine whether:

- The schedule contract, upon which the BPA was established, is still in effect;
- The BPA still represents the best value (see 8.404(d)); and
- Estimated quantities/amounts have been exceeded and additional price reductions can be obtained.

The ordering activity shall document the results of its review.

**SERVICE CONTRACT LABOR STANDARDS (SCLS) STATEMENT**

The Service Contract Labor Standards (SCLS) is applicable to this contract as it applies to the entire Multiple Award Schedule and all services provided. While no specific labor categories have been identified as being subject to SCLS due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29 CFR 541.300), this contract still maintains the provisions and protections for SCLS eligible labor categories.
If and / or when the Contractor adds SCLS labor categories / employees to the contract through the modification process, the Contractor must inform the Contracting Officer and establish a SCLS matrix identifying the GSA labor category titles, the occupational code, SCLS labor category titles and the applicable WD number. Failure to do so may result in cancellation of the contract.
LABOR CATEGORY DESCRIPTIONS

Subject Matter Expert
Responsibilities: Evaluates the quality improvement activities of organizations. Provides technical support for the development and maintenance of quality measures; performs research and project management tasks. Ensures compliance with legal and procedural guidelines and quality standards.

Education and Experience: A Ph.D. and at least 3 years of relevant work experience. A substitute requirement is to have a Master’s degree and at least 5 years of relevant work experience. Experience in a clinical setting, health insurance quality improvement department, Quality Improvement Organization, or related setting. Certification as CPHQ RHIA, RHIT, or licensure as a RN is preferred.

Principal Associate
Responsibilities: Provides consulting and project services; plans, organizes, staffs, directs, and manages performance of work for one or more task orders within the relevant subject matter domain of the project and the Principal Consultant's practice area; responsible for review and approval of all publications; monitors the technical quality of the work product; approves conference agendas and participant lists.

Education and Experience: Ph.D. and a minimum of 15 years of relevant management and supervisory experience. Relevant experience includes program evaluation and management, project management, strategic planning, and organizational assessment.

Senior Associate
Responsibilities: Designs and directs projects; conducts research and analysis; organizes a broad variety of high-level workshops; supervises and organizes research staff on contract task orders; prepares and edits studies, monographs and reports; provides consulting services, technical assistance and subject matter expertise.

Education and Experience: Ph.D. and a minimum of 10 years of relevant experience. A substitute requirement is to have a Master's degree and a minimum of 15 years of relevant management experience. Relevant experience includes providing principal associates with evaluations and recommendations for program evaluation, program and project management, strategic planning, and organizational assessment.

Associate
Responsibilities: Manages projects; conducts research and analysis; organizes specific high-level workshops; supervises and organizes research staff on contract task orders; prepares and edits studies, monographs and reports; provides consulting services, technical assistance and subject matter expertise.
Education and Experience: Ph.D. A substitute requirement is to have a Master's degree and a minimum of 5 years of relevant management experience. Relevant experience includes active research in projects involving program evaluation and management, strategic planning, and project management.

Analyst III
Responsibilities: Assists Senior Researchers on projects. Responsibilities include conducting literature reviews on specified topics; statistical analysis of primary and large secondary quantitative data sets; participate in qualitative data collection (interviews and focus groups); writing brief abstracts, data results, and contributing to final reports and creating/formatting tables and graphics.

Education and Experience: Master's degree and a minimum of 2 years. A substitute requirement is to have a Bachelor's degree and 5 years of relevant experience.

Analyst II
Responsibilities: Assists Senior Researchers on projects. Performs research and analyses in assigned subject matter area; develops data and reports for specific requests and resulting products of acceptable quality. Compiles and assemble documents for delivery to multiple clients on a specified schedule. Level II staff will work on more complex assignments.

Education and Experience: Bachelor's degree in business, statistics, economics, sociology, or other social science discipline. A minimum of one year of relevant experience is required.

Analyst I
Responsibilities: Assists Senior Researchers on projects. Performs research and analyses in assigned subject matter area; develops data and reports for specific requests and resulting products of acceptable quality. Compiles and assemble documents for delivery to multiple clients on a specified schedule. Level II staff will work on more complex assignments.

Education and Experience: Bachelor's degree in business, statistics, economics, sociology, or other social science discipline.

Statistician
Responsibilities: Develops statistical designs to answer specific research questions using large datasets; conceptualizes the scope of programming projects and tasks and solves complex programming problems; prepares analysis plans and writes detailed specifications for analysis files, consistency checks, tables, and figures; communicates with clients regarding statistical analysis issues. Interprets analyses and writes statistical reports.

Education and Experience: Ph.D. A substitute requirement is to have a Master's degree and 3 years of relevant experience. Experience developing large-scale study design, comprehensive statistical analysis from descriptive to multivariate and multi-level analysis; proficiency in SAS, including data manipulation, analysis, and documentation; experience programming and interpreting statistical analyses and/or building statistical models.
Senior Statistician
Responsibilities: Develops statistical designs to answer specific research questions using large data sets; conceptualizes the scope of programming projects and tasks and solves complex programming problems; prepares analysis plans and writes detailed specifications for analysis files, consistency checks, tables, and figures; communicates with clients regarding statistical analysis issues. Interprets analyses and writes statistical reports.

Education and Experience: Ph.D. and at least 3 years of relevant experience. A substitute requirement is to have a Master's degree with a minimum of 5 years of relevant experience. Experience developing large-scale study design, comprehensive statistical analysis from descriptive to multivariate and multi-level analysis; proficiency in SAS, including data manipulation, analysis, and documentation; experience programming and interpreting statistical analyses and/or building statistical models; experience working on complex projects and history of supervising others may be required.

Project Director
Responsibilities: Manages, coordinates and completes multiple projects. Oversees all aspects of projects, including setting deadlines, assigning responsibilities, and monitoring and summarizing budget and progress of project. May supervise multiple Project Managers. Prepares and reviews status reports.

Education and Experience: Bachelor's degree and at least 7 years of experience in project management; managing multiple, complex projects and supervising multiple teams.

Information Services Manager
Responsibilities: Manages information technology and consulting services. Provides expertise and technology solutions that utilize information systems to meet business/project needs and improve efficiency.

Education and Experience: Bachelor's degree and at least 5 years of experience in the IT management field or in a related area including supervisory experience.

Senior Project Manager
Responsibilities: Manages, coordinates and completes projects. Oversees all aspects of projects, including setting deadlines, assigning responsibilities, and monitoring and summarizing budget and progress of project. Prepares status reports.

Education and Experience: Bachelor's degree and at least 7 years of experience in project management; managing complex projects.

Project Manager II
Responsibilities: Manages, coordinates and completes projects. Oversees all aspects of projects, including setting deadlines, assigning responsibilities, and monitoring and summarizing budget and progress of project. Prepares status reports.
Education and Experience: Bachelor's degree and at least 5 years of experience in project management.

Project Manager I
Responsibilities: Manages, coordinates and completes projects. Oversees all aspects of projects, including setting deadlines, assigning responsibilities, and monitoring and summarizing budget and progress of project. Prepares status reports

Education and Experience: Bachelor's degree and at least 2 years of experience in project management.

Senior Programmer
Responsibilities: Coordinates, programs, analyzes, and evaluates clinical and non-clinical data; programs using SAS programming language. Develops sophisticated data analyses and presents results to a nontechnical audience.

Education and Experience: Bachelor's degree and at least 5 years of experience in the field or in a related area; may require supervision of others.

Programmer
Responsibilities: Coordinates, programs, analyzes, and evaluates clinical and non-clinical data; programs using SAS programming language. Develops sophisticated data analyses and presents results to a nontechnical audience.

Education and Experience: Bachelor's degree and at least 2 years of experience in the field or in a related area.

Database Administrator / Designer
Responsibilities: Designs, develops, deploys and maintains databases ensuring integrity and security.

Education and Experience: Bachelor's degree and certification preferred. A substitute requirement is to have equivalent work experience and certification preferred. At least 2 years designing, implementing and supporting database solutions in Access, Microsoft SQL Server, and Oracle; experience in open source development and technologies preferred.

Information Technology Support Specialist
Responsibilities: Provides information technology support to end users on a variety of issues. Identifies, researches, and resolves technical problems. Documents, tracks, and monitors the problem to ensure a timely resolution. Supports web based technology and other applications.

Education and Experience: Associate's degree in a related area and at least 1 year of experience in the field or in a related area.
Communications Specialist

Responsibilities: Designs and coordinates internal and external company communications and public relations. Maintains policies and procedures, monitors company media, and utilizes electronic publishing technology. Provides project support to senior staff and assists with travel planning and expense reporting.

Education and Experience: Bachelor's degree and at least 5 years of experience in the field or in a related area.

Senior Editor

Responsibilities: Writes, edits and proofreads a variety of documents. Ensures that all documents meet established content standards; may supervise others.

Education and Experience: Bachelor's degree in a related area and at least 5 years of experience in the field or in a related area.

Editor

Responsibilities: Writes, edits and proofreads a variety of documents. Ensures that all documents meet established content standards.

Education and Experience: Bachelor's degree in a related area and at least 2 years of experience in the field or in a related area.

Senior Graphics Specialist

Responsibilities: Produces graphic art and visual materials for presentations, marketing, informative and instructional materials through a variety of media outlets; may supervise others.

Education and Experience: Bachelor's degree in related area and at least 5 years of relevant experience with current technology and media.

Graphics Specialist

Responsibilities: Produces graphic art and visual materials for presentations, marketing, informative and instructional materials through a variety of media outlets.

Education and Experience: Bachelor's degree in related area and at least 2 years of relevant experience with current technology and media.

Project Management Assistant

Responsibilities: Reports directly to Project Manager or Director; assists in gathering data for reporting information to the client or internal team. Completes day to day administrative tasks in a timely manner as directed by supervisor.
Education and Experience: Bachelor's degree in related area and at least 1 year of relevant experience; Administrative experience and intermediate computer skills.

**Senior Support Services Specialist**

**Responsibilities:** Directs clerical and administrative support for project task; prepares contract correspondence and memos; makes travel arrangements and prepares travel itineraries for staff; experience in all aspects of office support including word processing, graphics productions, reproduction and distribution. Efficiently and accurately reproduces final products by copying, collating, and binding.

Education and Experience: Bachelor's degree preferred with a minimum of 2 years of relevant administrative experience. Ability to utilize the most recent software and computer applications to produce state-of-the-art presentation materials and technical documents.

**Support Services Specialist**

**Responsibilities:** Conducts clerical and administrative duties to support project task; assists in preparing contract correspondence and memos; makes travel arrangements and prepares travel itineraries for staff; experience in all aspects of office support including word processing, graphics productions, reproduction and distribution. Efficiently and accurately reproduces final products by copying, collating, and binding.

Education and Experience: 2 years of relevant administrative experience. Ability to utilize the most recent software and computer applications to produce state-of-the-art presentation materials and technical documents.
## HOURLY RATES FOR SERVICES
**SIN 541611 / OLM**

<table>
<thead>
<tr>
<th>Labor Category Title</th>
<th>Option Year 16 9/10/18-9/9/19</th>
<th>Option Year 17 9/10/19-9/9/20</th>
<th>Option Year 18 9/10/20-9/9/21</th>
<th>Option Year 19 9/10/21-9/9/22</th>
<th>Option Year 20 9/10/22-9/9/23</th>
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<td>Hourly Rate</td>
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Note: all prices offered to GSA include the current 0.75% IFF