



IT/RM SOLUTIONS

**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 is available through **GSA Advantage!™**, a menu-driven database system. The INTERNET address for **GSA Advantage!™** is: <http://www.GSAAdvantage.gov>.

**Schedule for – Office, Imaging and Document Solutions**  
**Federal Supply Group: 36**  
**Contract Number: GS-25F-0016T**

**For more information on ordering from Federal Supply Schedules**  
click on the FSS Schedules button at <http://www.fss.gsa.gov>

**Contract Period: 02-01-2007 through 01-31-2012**

**NetSmith Incorporated**  
**247 West Patrick Street**  
**Frederick, MD 21701**  
**Phone: (301) 591-4045**  
**Fax: (301) 591-1637**  
**Website: [www.netsmithusa.com](http://www.netsmithusa.com)**  
**Email: [info@netsmithusa.com](mailto:info@netsmithusa.com)**

**Contract Administrator: Steven L. Smith ([ssmith@netsmithusa.com](mailto:ssmith@netsmithusa.com))**  
**Business Size: Small Veteran Owned Small business**

Modifications: None  
Addendum 1: Government Price List  
Addendum 2: Services Description and Philosophy  
Addendum 3: Labor Category Descriptions

Prices Shown Herein are Net (discount deducted)

NetSmith Inc., Imaging and Document Solutions GSA Schedule Number GS-25F-0016L

## INFORMATION FOR ORDERING OFFICES

### 1a. Table of Awarded Special Item Numbers (SINs):

- 51-501 Needs Assessment and Analysis Services (NAAS)
- 51-503 Educational & Training Support Services (ETSS)
- 51-504 Records Management Services (RMS)
- 51-509 Network Connectivity Support Services (NCSS)

### Labor Categories

Under each SIN, NetSmith offers the following 14 labor categories:

Labor Category	Code
General Project Clerk	RM-001
Records Clerk II	RM-003
Records/Info Tech III	RM-006
Records Analyst III	RM-009
Records Manager II	RM-011
Records Consultant I	RM-013
Senior Records Consultant	RM-015
Training Specialist II	RM-017
Tech Info /Systems Analyst	RM-020
Information System Engineer	RM-021
System Integration Engineer	RM-022
Senior Technical Consultant	RM-023
Project Manager	RM-024
Program Manager	RM-025

### 1b. Lowest Price Model Number:

Not Applicable

### 1c. Job Descriptions: A detailed description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees who will perform the services can be found in Attachment 2.

### 2. Maximum Order:

\$1,000,000.00

### 3. Minimum Order:

\$100.00

### 4. Geographic Coverage (delivery Area):

The geographic scope of the contract is the 48 contiguous states, excluding Alaska, Hawaii, and Puerto Rico.

### 5. Point(s) of production (city, county, and state or foreign country):

Same as Contractor

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

Rates proposed are based on the commercial pricing of NetSmith, Inc. Government Net Prices (discount already deducted). See prices located in Attachment 1.

**7. Quantity discounts:**

NetSmith proposes to offer GSA the following additional discounts:

NetSmith, Inc. offers discounts for orders that exceed hourly commitment thresholds in accordance with the table below.

Minimum hours	Maximum hours	Discount percentage
0	2000 hours	0%
2000 hours	6000 hours	1%
6000 hours	12000 hours	2%
12000 hours	Above 12000 hours	3%

Blanket Purchase Agreement orders greater than 10,000 hours within a single SIN earn a 1% discount above the tiered quantity/dollar volume discount described above.

**8. Prompt payment terms:**

Net 30 days

**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:**

Yes

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

None

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

Delivery terms are 30 days after receipt of order for standard delivery unless otherwise stipulated by the ordering agency.

**11b. Expedited Delivery:**

Expedited delivery of service offering will be negotiated by NetSmith, Inc. and the ordering agency as needed.

**11c. Overnight and 2-day delivery:**

Contact NetSmith, Inc.

- 11d. Urgent Requirements:**  
Will be negotiated by NetSmith, Inc. and the ordering agency.
- 12. F.O.B Point(s):**  
Destination
- 13a. Ordering Address:**  
NetSmith Inc.  
247 West Patrick Street  
Frederick, MD 21701  
Tel: (301) 591-4045  
Fax:(301) 591-1637
- 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:**  
NetSmith Inc.  
247 West Patrick Street  
Frederick, MD 21701  
Tel: (301) 591-4045  
Fax:(301) 591-1637
- 15. Warranty provision:**  
Not Applicable
- 16. Export Packing Charges:**  
Not Applicable
- 17. Terms and conditions of Government purchase card acceptance (any thresholds above the micro-purchase level):**  
Contact NetSmith, Inc.
- 18. Terms and conditions of rental, maintenance, and repair:**  
Not Applicable
- 19. Terms and conditions of installation:**  
Not Applicable
- 20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices:**  
Not Applicable
- 20a. Terms and conditions for any other services:**  
Not Applicable

- 21. List of service and distribution points:**  
Not Applicable
- 22. List of participating dealers:**  
Not Applicable
- 23. Preventive maintenance:**  
Not Applicable
- 24a. Environmental attributes, (e.g., recycled content, energy efficiency, and/or reduced pollutants):**  
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., contractor's website or other location):**  
Not Applicable  
The EIT standards can be found at: [www.Section508.gov/](http://www.Section508.gov/).
- 25. Data Universal Numbering System (DUNS) number:**  
00-987-5634
- 26. Notification regarding registration in Central Contractor Registration (CCR) database:**  
NetSmith Incorporated is registered in the CCR Database.

## Addendum 1: Government Price List

### Government Price list

NetSmith's government pricing reflects a 10% discount from NetSmith's standard commercial pricing. NetSmith's government price list is as follows.

<b>Labor Category</b>	<b>Code</b>	<b>GSA Net On-site Rate</b>	<b>GSA Net Off-site Rate</b>
<b>General Project Clerk</b>	RM-001	\$36.18	\$45.22
<b>Records Clerk II</b>	RM-003	\$37.61	\$47.01
<b>Records/Info Tech III</b>	RM-006	\$51.41	\$64.27
<b>Records Analyst III</b>	RM-009	\$59.03	\$73.79
<b>Records Manager II</b>	RM-011	\$68.55	\$85.69
<b>Records Consultant I</b>	RM-013	\$85.69	\$107.11
<b>Senior Records Consultant</b>	RM-015	\$119.01	\$148.76
<b>Training Specialist II</b>	RM-017	\$68.55	\$85.69
<b>Tech Info /Systems Analyst</b>	RM-020	\$66.65	\$83.31
<b>Information System Engineer</b>	RM-021	\$80.93	\$101.16
<b>System Integration Engineer</b>	RM-022	\$95.21	\$119.01
<b>Senior Technical Consultant</b>	RM-023	\$113.34	\$141.68
<b>Project Manager</b>	RM-024	\$95.21	\$119.01
<b>Program Manager</b>	RM-025	\$136.01	\$170.02

## **Addendum 2: Services Description and Philosophy**

### ***THE OFFICE, IMAGING AND DOCUMENT SOLUTION DESCRIPTIONS***

#### **Description of Services Offered**

##### ***SIN 51-501, Needs Assessment and Analysis Services (NAAS)***

NetSmith provides NAAS consultant expertise in support of agencies' management, organizational and business improvement efforts. Through our NAAS support, we assist in delivering business value, meeting compliance objectives, preserving information assets, and building efficiencies into business processes. NetSmith deliverables may include the following as determined by the agency customer: studies, analyses, and reports documenting any proposed developmental, consultative; implementation efforts designed to improve operations and decrease costs; projected costs; prioritized action plans; milestone schedules; or recommendations in the format (hard copy, electronic or audio-visual) best suited to the customer's needs and warranted in accordance with NetSmith's commercial practice. As requested by the agency customer, we will study requirements and processes, interview staff, research literature, conduct benchmarking exercises, report findings, and develop conclusions and recommendations.

##### ***SIN 51-503, Educational & Training Support Services (ETSS)***

NetSmith delivers two types of training: 1) custom training on policies and procedures about the customer agency's project or operational effort (such as about a records management program and related network support services) and 2) standard training to consist of a briefing, per CFR requirement, for annual refresher training on Federal employee recordkeeping responsibilities and related NARA issues. NetSmith understands and will honor contract requirements for cancellation (within 14 days or as otherwise established), re-scheduling (within 90 days or as otherwise established), follow-up support (by phone for 6 months after training is complete or as otherwise established), and NetSmith cancellation (within 72 hours or as otherwise established). NetSmith will also provide course materials, course descriptions, and certificates of completion as required for each individual training effort.

##### ***SIN 51-504, Records Management Services (RMS)***

NetSmith offers expertise and resources to support all elements of a comprehensive lifecycle records management program. NetSmith services include performance of ongoing records management program operations and special projects that support the mission of the agency and compliance with Federal records management requirements. These services include developing policies and procedures for records management programs, designing and implementing systems and processes for capturing and organizing agency records, conducting file inventories, developing file plans, indexing systems and tracking tools to assist customers with records

maintenance and retrieval. NetSmith also can coordinate and carry out records transfer, storage, and disposition activities. We can also assist agencies with updates and major revisions of agency-wide records retention schedules, utilizing current trends in simplified and functional media neutral scheduling (i.e., by content rather than record format).

Our staff are familiar with the latest technologies for processing and managing an organization's business information, content, and official records regardless of format, which we will ensure are properly identified and protected from damage, wear and tear or modification during access and storage and use. As required by the individual effort, we are prepared to perform accession, inventory, pick-up, and tracking tasks. We will meet and exceed agency customer requirements for quality assurance, reference room facilities, and documentation (e.g., user manuals and reports).

With our expertise in electronic records management (ERM) we can assist customers with major initiatives to introduce ERM solutions to their agency record management programs. These services include developing project plans and strategies, project management, system design and testing, implementation assistance, communications planning, user training, and ongoing system support and maintenance.

***SIN 51-509, Network Connectivity Support Services (NCSS)***

NetSmith assists customers with lifecycle electronic records management initiatives including developing a concept of operations, designing and configuring network connectivity, testing, supporting pilots, evaluating results, and assisting with planning and implementing rollouts. We provide NCSS to the customer agency to establish, manage and troubleshoot LAN/WAN connectivity, including wireless and remote access through a "virtual office" configuration that will allow reliable access to customer software applications and network operating systems supporting digital records management equipment. The virtual office option will provide access to all required software and network functionality (such as record searching and retrieval) from any remote location(s) specified. Our NCSS will allow users to communicate with customers internally and externally across shared network so they can search, view, access and print documents right from their desktop.

## **NetSmith's Management Concept Theory**

NetSmith is pleased to describe our management concept theory, which is a standard component of all initiatives we undertake, including the services we would offer under this solicitation. NetSmith's goal is to develop long-term relationships with our customers by delivering high quality support with a level of candor that conveys a commitment to our customers' mission and our value as trusted advisors. We realize this goal through the following standard consulting approach:

- 1) Listen to customer requirements
- 2) Provide qualified and relevant consultants
- 3) Communicate honest assessments of capabilities and project goals -- always
- 4) Value customer information
- 5) Design optimum solutions not dictated by profit or vendor interests
- 6) Discover and meet true needs without forcing a fix
- 7) Own and manage interim project challenges
- 8) Develop solutions that build value and exceed expectations
- 9) Deliver solutions we would buy
- 10) Go the extra mile to deliver successful results

Since 1997, NetSmith has provided information technology and records management and related consulting expertise to public and private sector clients. The success of our management concept theory and the capabilities of our resources are clearly evident in our certified 95% customer satisfaction score through Open Ratings.

## **NetSmith's Overall Understanding of Services Offered**

### ***SIN 51-501, Needs Assessment and Analysis Services (NAAS)***

NetSmith will assist GSA Schedule 36 customers by providing Needs Assessment and Analysis Services (NAAS) under this solicitation through professional consulting and analytical efforts focused on records and information management and related training and network connectivity support. In a records and information management effort, our NAAS focus on the following key elements:

- Program goals and boundaries
- Business, regulatory, legal, and budgetary drivers
- Policies and procedures and effectiveness of implementation
- Strategic priorities
- Recommendations for action

To provide effective NAAS support, a NetSmith consultant possesses a thorough understanding of the best practices that govern the field of records management today (including regulatory, legal and business drivers). At the start of an engagement, we acquire a thorough knowledge of the customer's

current state of operations as well as insight into the enhanced future state of operations desired. Possessing this awareness of the organization “as is” and “to be,” the consultant will then be in a position to assist the agency with conducting a gap analysis and assessing needs that may translate into customer requirements. Knowledge required for this exercise will stem from the consultant’s appropriate educational and professional experience in the records and information management field; research and analysis of regulatory, legal and business requirements appropriate to the customer’s business; and consultants’ interviews and documentation reviews at the customer site. In order to fully assist the agency, the consultant will also have an awareness of the requirements for Section 508 of the Rehabilitation Act and agency security. The level of consultant knowledge will vary with the NAAS task at hand – for example, a senior consultant might assist with survey instrument development, while a junior consultant might compile results and interview notes.

NetSmith senior consultants are expert in the concepts of records management and information technology, along with electronic and digital innovations that are applied to modern NAAS efforts. Consultant skills include interviewing and data collection skills, the ability to draw insightful conclusions and make recommendations, organizational skills and attention to detail, consistency in application of rules and procedures, customer service skills, interviewing skills, situational analysis capabilities, process orientation, problem-solving, decision-making, and documentation and technical writing capabilities. Our consultants also possess current and relevant functional skills, such as in budget formulation/finance/accounting, cost analysis, agency operations, regulatory compliance, and strategic planning.

The most important resources for conducting a NAAS support effort will be the customer’s own information as provided through such vehicles as organizational records; documentation of agency mission, goals, objectives and tasks; surveys and studies; budget and regulatory materials; policy and procedure manuals; funding obligations; and related corporate knowledge acquired from staff interviews. Such customer information assets would then be compared and contrasted with current research and industry/Government best practices data to help inform the decision-making process and develop recommendations for progressing toward business improvement efforts and an optimum “total office” or turnkey solution that may include such features as enhanced document management solutions or integration of enhanced software applications. NetSmith’s expert consulting resources would be applied as required to accomplish project or operational goals.

### **SIN 51-503, Educational & Training Support Services (ETSS)**

NetSmith strongly believes that effective customer education and user training is the program element most critical to the success of a records management program implementation. For this reason, NetSmith can

provide GSA Schedule 36 customers Educational and Training Support (ETSS) under this contract as part of a comprehensive approach to providing professional records and information management services.

NetSmith training consultants have expertise with customer training, tools and techniques effective in adult education, curriculum development, training objectives formulation, and delivery methodologies to include instructor delivered classroom training, Computer Based Training (CBT), web-based, video, audio, or other format. Our consultants are also knowledgeable about agency customers based on project and regulatory experience and awareness of Federal recordkeeping responsibilities. NetSmith support personnel are trained to implement best administrative practices for training logistics such as scheduling, registration and evaluation surveys.

The NetSmith classroom training consultants possess effective interactive communication skills, such as public speaking, and comfort with the audience at all levels of the customer agency up to the senior executive level. The NetSmith interactive training consultant has expert knowledge of cutting edge web, CBT and multimedia training applications and their development.

NetSmith will provide human resources to support ETSS including training development and delivery experts knowledgeable about both CBT and classroom formats. We are prepared to conduct customer site training or to engage other venues at the request of the customer.

### ***SIN 51-504, Records Management Services (RMS)***

High-quality, professional Records Management Services (RMS) have been one of NetSmith's core offerings since 2002. NetSmith plans to continue in this tradition by providing dedicated experts in the profession to assist GSA Schedule 36 customers with a full-range of Records Management Services (RMS), including physical and electronic file organization and maintenance, content classification and indexing, tracking and control, retrieval, and related services.

The range of knowledge required to provide RMS support will vary according to the task at hand, and NetSmith will carefully match our consultant knowledge level to each task assignment to bring the best value to the agency customer. At the beginning of the continuum, NetSmith will provide consultants who have basic educational, technical and professional knowledge to fulfill similarly basic service requirements such as file maintenance, scanning, or document retrieval tasks. At the other end of the continuum, NetSmith will provide consultants who are senior industry experts with advanced degrees, senior level work experience, and Certified Records Manager (CRM) certification with resulting knowledge of regulatory, strategic, information technology, funding, policy and management issues that can affect an RMS effort. In order to be effective, our consultants will

acquire knowledge of the agency customer's RMS operations, issues, and goals as they relate to records capture and creation, file organization, file maintenance, records transfer, and records and information retrieval and disposition services. NetSmith consultants are also knowledgeable about current trends in electronic records and document management and business processes, and the compliance implications of the Federal Records Act, National Archive and Records Administration (NARA) regulations, and industry standards, such as, DoD 5015.2-STD and the ISO Records Management Standard 15489.

NetSmith consultants providing RMS have skills to support the full range of life-cycle records management activities. We specialize in electronic records management initiatives and offer professional consulting expertise to assist customers making the transition from paper-based to electronic business processes. We also offer skills in the following areas: records retention schedule development and implementation, records inventory, records tracking and control systems, information technology (particularly in records management software, networking, scanning, imaging, indexing, labeling, and bar coding); filing; organization; planning; documentation and communication/ presentation. We can also offer specialized skills such as delicate/archival/historical material handling. At a junior level, skills include attention to detail, task focus, ability to carry out complex procedures, capacity to lift and carry files and boxes, and ability to drive a vehicle.

Records and file management efforts are labor intensive, and NetSmith's team has the depth and experience to handle any customer agency challenge. Additionally, our resources include consultant expertise, agency customer information (particularly about records management initiatives), hardware, software, filing materials, file organization and destruction equipment, imaging and bar coding equipment, shipping materials, storage media, consultant security clearances, and facility certification as appropriate. NetSmith is also prepared to provide the emergency RMS and record retrieval resources as required.

### ***SIN 51-509, Network Connectivity Support Services (NCSS)***

NetSmith has the knowledge, skills, and resources to manage data, document and record repositories, and the wide range of electronic information resources that are distributed across the customer agency's enterprise network. NCSS enables and promotes collaborative work processes, document sharing, and instant access to, and retrieval of, an agency's information in a protected manner across a secure network.

To support an agency's records and information management efforts, NetSmith consultants have expertise with a wide range of operating systems including those offered by major vendors (e.g., Microsoft, Novell, Sun) and those available as open source solutions (e.g., Linux). They are also expert at the particular issues that can affect Local or Wide Area Networks

(LAN's/WAN's) and wireless networks that can support the peripherals and equipment (e.g., communications, imaging, and digitization machines) and software (e.g. records databases and email) inherent to a records management effort.

NetSmith NCSS consultants have the ability to integrate records and document management efforts into existing networks, and to manage the effects of electronic records and document management on the enterprise. Our technical consultants are skilled in performing and documenting all phases of the engineering lifecycle including gathering customer requirements; designing solutions; developing records databases, spreadsheets, scripts, code, and integrations; deploying hardware and software solutions; and conducting maintenance activities such as configuration management, training, applying patches, security, quality assurance, upgrades, troubleshooting, and monitoring of fielded technology. Our consultants are prepared to meet and exceed the requirements of customer agency Service Level Agreements (SLA's) and other metrics to ensure superior performance; we are prepared to use a ticketing system or other help desk tracking software to allow for the collection of metrics and development of an FAQ knowledge base.

We are prepared to conduct all activities (e.g., topology design, cabling, router configuration, operating system installation, temperature control, and virus scanning) required to deploy the hardware products of these and other vendors. NetSmith consultants are also prepared to provide support to all network software through highly qualified systems administrators, network operations center (NOC) consultants and help desk staff as required by the agency customer. We have expertise in both on-site and off-site remote support of agency customers in local, regional, national locations. NetSmith also possesses corporate expertise in designing, deploying and managing telecommunications solutions.

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## **Addendum 3: Labor Category Descriptions**

### **RM-001: General Project Clerk**

*Description:* Performs general clerical duties related to records management projects and project administrative activities. Duties include processing and maintaining files, preparing and maintaining project documentation, correspondence, and logs, reproduction and distribution of project materials, data entry, answering phones, ordering supplies, delivery services, and other administrative duties. Requires basic computer skills and attention to detail. Ability to move, lift and carry boxes up to 25 pounds. Requires direct supervision.

*Minimum Education:* HS diploma or GED (General Equivalency Diploma).

*Minimum Work Experience:* 1 year work experience performing general clerical duties.

### **RM-003: Records Clerk II**

*Description:* Performs routine clerical duties related to records management and document processing projects. Duties include filing and sorting of documents and files, preparing documents for imaging, scanning, microfilming, photocopying, or other processing, packing boxes, and other clerical project activities. Performs routine data entry and coding, and prepares files indexes and inventories. Requires attention to detail, knowledge of routine clerical functions, and basic computer skills. Ability to move, lift and carry boxes up to 25 pounds. Requires direct supervision.

*Minimum Education:* HS diploma or GED (General Equivalency Diploma).

*Minimum Work Experience:* 3 + years of clerical work.

### **RM-006: Records/ Information Technician III**

*Description:* Performs routine functions associated with document and records management operations and special projects. Leads team of records technicians performing records management operations and tasks, monitors quality and productivity, and reports on task status. Activities include document processing, sorting, screening, coding, data entry, organizing and maintaining physical and electronic files and filing systems, and other tasks to support records capture, retrieval, maintenance, and disposition. Requires knowledge of document/records management operations and principles. May monitor and review work of other team members for quality and compliance to task procedures.

*Other Attributes for Success:* Attention to detail, strong computer skills. Ability to move, lift and carry boxes up to 25 pounds. Ability to apply knowledge and experience to solve problems and achieve successful completion of assigned tasks.

*Minimum Education:* Associate's degree or 2 years college studies or certification in Records and Information Technology.

*Minimum Work Experience:* 5 + years records management experience

### **RM-009: Records Analyst III**

*Description:* Performs analytical functions and activities associated with ongoing records management operations and special projects. Requires knowledge and understanding of life-cycle records management processes and techniques (inventories, retention schedules, filing systems, storage, retrieval, and disposition of physical and electronic records) and ability to apply knowledge to project requirements. Performs inventories, develops retention schedules, organizes and maintains records collections, conducts research in response to routine and special requests, and conducts records disposition activities. Develops and implements project procedures. Analyzes processes, researches requirements, and makes recommendations for designing and improving records management procedures.

*Other Attributes for Success:* Attention to detail, strong computer skills. Ability to move, lift and carry up to 25 pounds.

*Minimum Education:* Bachelors Degree or certification in Records or Information Technology

*Minimum Work Experience:* 5+ year work experience in records program support

### **RM-011: Records Manager II**

*Description:* Oversees records and information management operations, projects, and services. Establishes and implements policies and procedures, implements and maintains retention schedules, manages inventory and tracking systems, records classification, file maintenance, retrieval requests, on-site and off-site storage services, and other project activities and services to meet customer requirements. Supervises records clerks, technicians, and analysts.

*Other Attributes for Success:* Experience with a variety of records management operations, practices and procedures. Familiar with records management software products and automated processes. Strong communication and interpersonal skills, ability to train and supervise staff.

*Minimum Education:* Bachelors Degree, preferably in library/information science, business administration, or Records and Information Technology field.

*Minimum Work Experience:* 4-7 work experience in records program support.

### **RM-013: Records Consultant I**

*Description:* Performs in-depth analyses, studies, assessments, of records and information management program elements and complex issues. Provides recommendations for solutions, develops strategies and plans for

implementation. Assists customers with program development, planning, implementation, and performance evaluation.

*Other Attributes for Success:* Creative and autonomous, able to take a strategic view.

*Minimum Education:* Bachelors degree in library/information science, management information systems, or Records and Information Technology.

*Minimum Work Experience:* 5 years progressive experience in records and information management

### **RM-015: Senior Records Consultant**

*Description:* Provides senior level consulting and professional services to customers on records management initiatives, regulatory and compliance issues, process improvements, and related complex business issues. Possesses in-depth knowledge of current records management trends, technology, and business impact. Guides records management strategic planning and policy development.

*Other Attributes for Success:* Certified Records Manager certificate. Has worked in multiple or complex records environments and possesses specialized knowledge and technical expertise for customized business solutions.

*Minimum Education:* Masters Degree in Library / Information Science, Management Information Systems, or Records and Information Technology.

*Minimum Work Experience:* 10 years experience working in multiple or complex records environments requiring specialized expertise

### **RM-017: Training Specialist II**

*Description:* Develops and delivers training programs, materials, and tools, relating to records management projects and activities. Duties include presenting classroom instruction using established course materials, providing informal orientation and user assistance, and developing course materials, supporting documentation, and computer-based training. Conducts training for customers and project staff in classroom, small group, and one-on-one settings, evaluates training effectiveness, coordinates training schedules and facilities, and manages participant registration and attendance, and other activities to support training program objectives. Develops customized curriculum to meet project and customer requirements, works with subject matter experts as needed for technical content and effective training delivery. Requires strong verbal and written communication skills, experience with customer relations and training.

*Other Attributes for Success:* Experience with a variety of classroom and computer-based training techniques, and Web-based training tools.

*Minimum Education:* Bachelors Degree or certification as training instructor

*Minimum Work Experience:* 3-5 years training experience

### **RM-020: Technical Information/Systems Analyst**

*Description:* Performs technical or specialized functions in support of document and records management projects and tasks. Duties include routine maintenance and update of information systems, databases, tracking tools, and other technical support activities. Also assists with system configuration and testing, troubleshooting, and user support. Requires basic computer skills and knowledge of standard office automation and database applications.

*Other Attributes for Success:* Attention to detail and ability to follow detailed procedures

*Minimum Education:* Associate's degree or 2 years college or certification in Records or Information Technology.

*Minimum Work Experience:* 1-3 years experience

### **RM-021: Information Systems Engineer**

*Description:* Performs technical or specialized functions supporting systems and software applications relating to document and records management projects. Duties include system design, software configuration to meet customer requirements, system enhancements and upgrades, testing, troubleshooting, and user support. Requires knowledge of information systems,

*Other Attributes for Success:* Attention to detail and ability to follow detailed procedures

*Minimum Education:* Bachelors Degree or certification in records or information technology.

*Minimum Work Experience:* 5 years experience in Records or Information Technology.

### **RM-022: Systems Engineer**

*Description:* Solid understanding of local and wide area networks, communications and host connectivity currently available in the market. Certification in at least one network operating system. Performs technical or specialized functions supporting systems and software applications relating to document and records management projects. Duties include system design, software configuration to meet customer requirements, system enhancements and upgrades, testing, troubleshooting, and user support.

*Other Attributes for Success:* Attention to detail and the ability to develop project or system documentation. Requires a wide range of knowledge and experience in information systems and communication technology.

*Minimum Education:* Bachelors Degree in Electrical Engineering, Computer Science, Management Information Systems, Systems Engineering, Network Engineering Technology or certification in Records or Information Technology..

*Minimum Work Experience:* 5 years of information systems engineering experience or 5 years of record systems engineering experience.

### **RM-023: Systems Integration Engineer**

*Description:* Integrates project/program-engineering efforts across disciplines including software and hardware. Derives program/project requirements through analysis of the client's needs documents such as (but not limited to) mission needs statements, objectives, security threat assessments, etc. Defines methodology, processes, and standards to be applied by the entire project team. Applies the applicable standards as needed. Is capable of leading project requirements analysis and/or requirements management activities on projects of simple or medium complexities.

*Other Attributes for Success:* Attention to detail Ability to develop project or system documentation. Plans and performs engineering research, design development, and other assignments in conformance with system design, engineering and customer specifications.

*Minimum Education:* Bachelors Degree in Computer Science or Management Information Systems or Systems Engineering or Network Engineering Technology or certification in Records or Information Technology..

*Minimum Work Experience:* 8 years of information systems engineering experience or 8 years of applicable systems engineering experience.

### **RM-024: Project Manager**

*Description:* Manages records and information management projects. Directs overall planning and execution of project activities, and ensures overall performance meets customer cost, schedule, and quality requirements, in accordance with company policies and objectives. Tracks and reports on project costs and status to customer and corporate management as required, and is primary interface with customer Contracting Officer and Contracting Officer's Technical Representative.

*Other Attributes for Success:* Experience with current project management theory (e.g., PMP) and techniques (e.g., MS Project). Strong functional knowledge of records management.

*Minimum Education:* Bachelor's degree in Library or Information Science, IT-related field, Business Management, or other discipline related to the project work scope.

*Minimum Work Experience:* 7-10 years experience in records/information management projects or related environment, including 5 years in a supervisory role.

### **RM-025: Program Manager**

*Description:* This person serves as the counterpart to the client program/technical manager for a complex program. Manages Records Management program/technical support operations involving multiple tasks/projects and personnel. Organizes, directs and coordinates planning and execution of all program/technical support activities. Has demonstrated engineering, information technology expertise and communication skills to be

able to interface with all levels of management. Assigns duties and reviews work of subordinates. Establishes and alters (as necessary) management structure within the program to effectively direct program/technical support activities. Meets and confers with client management officials regarding the status of specific program/technical activities and progress.

*Other Attributes for Success:* Resolves problems, issues or conflicts as required. Ensures that program schedule, performance, and deliverables are met.

*Minimum Education:* Bachelor's Degree in Business Administration, Information Technology, Library Sciences or related field.

*Minimum Work Experience:* a minimum of 10 years intensive and progressive experience in management of large programs and 5 years experience supervising, and 5 years managing multiple projects.