



# History Associates <sup>INC.</sup>

THE BEST COMPANY IN HISTORY<sup>®</sup>

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



## Contract Holder

Contract GS-25F-0038T

### GSA MULTIPLE AWRD SCHEDULE

Special Item Numbers:

SIN 493110RM: Physical Records Management Services

History Associates Incorporated

300 N. Stonestreet Avenue

Rockville, MD 20850

Phone: (301) 279-9697

Fax: (301) 279-9224

[www.historyassociates.com](http://www.historyassociates.com)

Business Size: Small Business

Contract Number: GS-25F-0038T

Period Covered by Contract: September 13, 2017, through September 12, 2022

On-line access to contract ordering information, terms and conditions, and 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 [www.GSAAdvantage.gov](http://www.GSAAdvantage.gov).



# ABOUT HISTORY ASSOCIATES

## COMPANY PROFILE

History Associates Incorporated is one of the oldest and largest historical services firms in America. We're rigorous researchers, talented writers, skilled archivists, and dedicated museum professionals. We know our craft, we're committed to our business, and we love what we do, so you can be assured that we invest personally in your project's success.

Since 1981, we've built our reputation on delivering the highest-quality historical services according to our clients' timelines and budgets. History Associates qualifies as a small business yet has the resources to handle large-scale projects and complex government contracts.

Our staff includes more than fifty professional historians, archivists, museum professionals, and support staff, which can be augmented by our relationships with specialized historical consultants. Together they bring years of practical experience and academic training to their work.

## COMPANY INFO

Company Type: Private Corporation  
DUNS Number: 037704574  
CAGE Code: 9Y474

## GSA CONTRACTING POC

Jeff Barnhart, Director of Finance  
jbarnhart@historyassociates.com

## TECHNICAL POC

Mark Evans, Director of Archives and  
Collections Management  
mevans@historyassociates.com

## NAICS CODES

519120 Libraries and Archives  
519190 All Other Information Services  
541611 Administrative Management and  
General Management Consulting  
Services  
541720 Research and Development in the Social  
Sciences and Humanities  
541990 All Other Professional, Scientific, and  
Technical Services  
561210 Facilities Support Services  
712110 Museums  
712120 Historical Sites



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## GSA SCHEDULE SERVICES

History Associates assists government agencies with all aspects of federal records management functions, at both the national and regional levels. We improve existing records management programs, revive programs that have been dormant for years, and implement programs for new agencies and divisions. We also administer records management operations on behalf of federal agencies.

### Program Compliance

- Promote compliance with federal standards and procedures
- Revive dormant records management programs
- Design and implement new government records management programs

### Program Development

- Conduct government records surveys and inventories
- Draft records retention and disposition schedules
- Develop policies and procedures for managing records

### Program Assistance

- Appraise government records for archival and historical value
- Execute federal records appraisal and scheduling paperwork
- Create office filing systems

### Program Improvement

- Provide guidance on electronic records management issues
- Assess program needs by surveying records and interviewing staff
- Create customized records schedules and records management procedures based on agency requirements



## OTHER SERVICES

### ARCHIVES

We help you gain control of your historical materials to create an accessible and usable past. We also help preserve your digital archives to ensure that they remain accessible now and well into the future.

### COLLECTIONS MANAGEMENT

We help you gain better intellectual and physical control of your art and artifact collections through program development, museum database software selection, and project support like relocation planning or inventory updates.

### HISTORIES

We do the research, interview participants, and tell your story in an illustrated history, monograph, website, or oral history.

### EXHIBITS

We combine imagery, text, artifacts, and multimedia to create a memorable visitor experience.

### INTERPRETIVE PLANNING

We guide you through the process of creating a great visitor experience for your historic site, from preparation to implementation.

### HISTORICAL RESEARCH

We navigate complex historical records systems to collect and analyze the evidence that addresses historical questions posed by attorneys, corporations, and the public.



## SAMPLE CLIENTS

Hundreds of clients from all sectors of the economy have worked with us to help them preserve, interpret, and share the history that matters to them. They include federal and municipal governments, corporations, associations, law firms, museums, and universities. Here are some representative companies and organizations.

### FEDERAL GOVERNMENT

American Battle Monuments Commission  
Library of Congress  
National Library of Medicine  
National Science Foundation  
U.S. Department of Defense  
U.S. Department of Homeland Security  
U.S. Department of State  
U.S. Department of the Navy

U.S. National Archives and Records Admin.  
National Institutes of Health  
National Park Service  
U.S. Army Corps of Engineers  
U.S. Department of Energy  
U.S. Department of Justice  
U.S. Department of the Air Force  
U.S. Department of the Treasury

### STATE AND LOCAL GOVERNMENTS

California Rural Indian Health Board (CRIHB)  
Chula Vista Public Library  
City of Santa Barbara, California  
County of Santa Clara, CA  
Metropolitan Water District of Southern California  
Montgomery County, Maryland, Library  
Prince William County, Virginia

Chavez and Lincoln Counties, New Mexico  
City of Riverside, California  
City of Ventura, California  
Fauquier County, Virginia  
Mission La Purisima State Historic Park  
  
New Mexico State Engineer Office  
Santa Clara County, California

### MUSEUMS

Anacostia Museum and Center for African American History and Culture  
Computer History Museum  
Las Vegas Mob Museum  
National Museum of American Jewish History  
  
National World War II Museum  
Normandy American Cemetery and Memorial Visitors Center  
The Wills House Museum  
University Art Museum, California State University, Long Beach

Bethel Woods Visitor's Center  
  
International Spy Museum  
National Center for Civil and Human Rights  
National World War I Museum and Liberty Memorial  
New York State Museum  
The Maritime Administration – American Merchant Marine Museum  
United States Holocaust Memorial Museum



## UNIVERSITIES

Embry-Riddle Aeronautical University  
Gettysburg College  
Pomona College

Stevenson University  
University of Oregon  
West Virginia University, Institute of Technology

George Washington University  
Philadelphia University  
Robert C. Byrd Center for Legislative Studies,  
Shepherd University  
University of Mississippi  
University of Virginia

## ASSOCIATIONS, ORGANIZATIONS, AND PHILANTHROPIES

American Association for Thoracic Surgery  
Boat Owners Association of the United States  
Chemical Heritage Foundation  
Eastern State Penitentiary  
Institute of Nuclear Power Operations  
National Electrical Contractors Association  
SEC Historical Society  
United Brotherhood of Carpenters

American Institute of Physics  
Carnegie Institution of Washington  
Civil War Trust  
Foundation for the National Archives  
Laborers International Union of North America  
National Football League Players Association  
Smithsonian Institution

## CORPORATIONS

Bausch & Lomb  
CooperVision  
DuPont  
GlaxoSmithKline  
JP Morgan Chase & Co.  
Levi Strauss & Co.  
Navistar  
Universal Avionics

Chevron  
Deloitte Canada  
Ford Motor Company  
IBM Corporation  
Legg Mason & Co., LLC  
Lockheed Martin  
Sentara Healthcare



## CUSTOMER INFORMATION

- 1a. Authorized Special Item Number (SIN). 493110RM – Records Management Services
- 1b. Lowest priced model number and lowest unit price for that model for each SIN awarded in the contract: See pricing on page 9
2. Maximum order: \$1,000,000
3. Minimum order: \$100.00
4. Geographic coverage (delivery area): Worldwide
5. Point of production (city, county, and state or foreign country): The United States of America
6. Discount from list prices or statement of net price: Prices listed herein are net
7. Quantity discounts: None
8. Prompt payment terms: None, Net 30 Days
- 9a. Notification that Government purchase cards are accepted below the micropurchase threshold (\$2,500)
- 9b. Notification that Government purchase cards are accepted above the micropurchase threshold (\$2,500)
10. Foreign items (list items by country of origin): Not Applicable
- 11a. Time of delivery: As negotiated between the Contractor and the Ordering Activity
- 11b. Items available for expedited delivery: Not Applicable
- 11c. Overnight and 2-day delivery: Not Applicable
- 11d. Urgent Requirements: Not Applicable
12. F.O.B. Point: Destination to the 48 contiguous states and Washington D. C. and port of exit to Alaska, Hawaii and Puerto Rico.
- 13a. Ordering address:  
History Associates Incorporated  
300 N. Stonestreet Avenue  
Rockville, MD 20850  
Phone: (301) 279-9697  
Fax: (301) 279-9224
- 13b. Ordering Procedures: For supplies and services, the ordering procedures, and information on Blanket Purchase Agreements (BPA's) are found in Federal Acquisition Regulation (FAR) 8.405-3.
14. Payment address:  
History Associates Incorporated  
300 N. Stonestreet Avenue  
Rockville, MD 20850  
Phone: (301) 279-9697  
Fax: (301) 279-9224
15. Warranty provision: Not Applicable
16. Export packing charges: Not Applicable



17. Terms and conditions of Government purchase card acceptance (any thresholds above the micropurchase level): None
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
25. Data Universal Number System (DUNS) number: 037704574
26. Notification regarding registration in the System for Award Management (SAM) database. Registered. CAGE Code: 9Y474





## GSA PRICE LIST

Labor Category	Hourly Rate
Senior Associate III	\$183.46
Senior Associate II	\$150.26
Senior Associate I	\$134.43
Senior Archivist/Records Manager III	\$116.02
Senior Archivist/Records Manager II	\$100.24
Senior Archivist/Records Manager I	\$85.07
Archivist/Records Manager III	\$83.40
Archivist/Records Manager II	\$72.40
Archivist/Records Manger I	\$64.33
Archivist/Records Tech. II	\$54.89
Archivist/Records Tech I	\$50.46
Project Support	\$59.84



## LABOR CATEGORIES

### Substitutions

History Associates reserves the right to make the following substitutions in the education and/or experience requirements of any of the service skill categories set forth herein.

1. One year of experience is the equivalent of one year of education.
2. One year of education is the equivalent of one year of experience.
3. Certification related to the technology is equivalent to two years of experience or education requirement.

### Senior Associate III

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Minimum/ General Experience:

Expert in archives and/or records management with extensive knowledge of professional concepts, processes, and issues. Minimum experience of 15 years at a senior level with archives and records management implementations and research initiatives. Experience planning and managing large-scale or complex programs and demonstrated ability to set and maintain overall direction for a program; to control overall scope, budget, and schedule for complex, multi-project programs.

Minimum Education:

MA/MLS

Responsibilities:

- Develops project strategies.
- Oversees the identification of alternative approaches and implications thereof and the development of innovative solutions to complex problems.
- Reviews feasibility studies, concept formulation, design, development, implementation, operation and maintenance of various systems, equipment, and procedures.
- Functions as a technical expert.
- Serves as a senior member of consulting teams.
- Analyzes and interprets data.
- Develops, or participates in the development of assignment methodology.
- Provides management and technical direction for problem definition, analysis and requirements development and implementation for complex situations in the subject matter area.



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### Senior Associate II

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- Minimum/ General Experience: Expert in archives and/or records management with extensive knowledge of professional concepts, processes, and issues. Minimum experience of 10 years at a senior level with archives and records management implementations and research initiatives.
- Minimum Education: MA/MLS
- Responsibilities:
- Participates in the development of project strategies.
  - Functions as a technical expert
  - Serves as a senior member of consulting teams.
  - Analyzes and interprets data.
  - Participates in the development of assignment methodology.
  - Participates in the design of tools and systems for projects.
  - Works with project team to interpret project requirements and specifications.
  - Provides management and technical direction for problem definition, analysis and requirements development and implementation for complex situations in the subject matter area.

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### Senior Associate I

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- Minimum/ General Experience: Eight years of progressive technical experience in complex projects, including at least 4 years in managing complex projects in archives and records management. Knowledge of professional archives and records management standards and practices including records appraisal, vital records, records retention and disposition, federal archives and records management procedures, records surveys and inventories, archival arrangement, description and preservation
- Minimum Education: Master's degree in library science or a related field with archival coursework.



Responsibilities:

- Manages substantial contract support operations, including multiple projects.
- Organizes, directs, and coordinates all phases of the contractor's contract support activities.
- Communicates orally and in writing with all levels of management for planning and control of projects.
- Reviews and recommends appropriate software and hardware systems for records management and retention.
- Meets with government management personnel and contract managers.
- Determines contract costs, and ensures conformance with standards.
- Assigns, schedules, and reviews work of subordinates.
- Explains policies, project objectives, and specific goals of the contractor organization to subordinates.
- Formulates and reviews task order plans and deliverable items, and determines and negotiates standards.
- Reviews products for accuracy and adherence to design and user standards.
- Verifies program documentation to comply with government standards and requirements.
- Assures that projects are completed in accordance with pre-set time schedules.



## Senior Archivist/Records Manager

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Minimum/ General Experience:	Five years of progressive archival and/or records management experience. Knowledge of professional archival and records management methods, practices, and procedures. If proposed as a task leader, requires six months experience as supervisor/manager of project activities.
Minimum Education:	Master's Degree in library science or a related field with archival coursework.
Responsibilities:	<ul style="list-style-type: none"><li>• Works as functional leader in client technical areas.</li><li>• Applies federal information and records management regulations and policies.</li><li>• Produces/ reviews substantive and complex technical documentation reflecting detailed knowledge of technical requirements of the task</li><li>• Formulates and reviews strategic plans and studies, and ensures conformance with professional standards.</li><li>• Supervises and audits database entry of records information.</li><li>• Develops and implements project plans.</li><li>• Develops, plans, organizes, and leads major segments of and/or entire consulting projects.</li><li>• Determines technical objectives, defines data requirements and methodology, and recommends staffing levels and schedules.</li><li>• Reviews and coordinates the progress of other team members, taking corrective action as appropriate.</li><li>• Responsible for all and/or major segments of multiple project output and deliverables.</li><li>• Writes and edits descriptive tools, manuals, reports, training materials, presentations, proposals and other technical documents.</li><li>• Researches, analyzes, and composes technical data for clarity, brevity and appropriate style and terminology.</li><li>• Reviews and performs technical editing for organization, format, consistency, quality, layout and preparation for production, accuracy of content and conformance to established standards.</li></ul>



### Archivist/Records Manager III

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Three years of progressive archival and/or records management experience. Knowledge of professional archival and records management methods, practices, and procedures. If proposed as a task leader, requires six months experience as supervisor/manager of project activities

Minimum  
Education:

Master's Degree in library science or a related field with archival coursework.

Responsibilities:

- Works as functional leader in client technical areas.
- Applies federal information and records management regulations and policies.
- Produces / reviews substantive and complex technical documentation reflecting detailed knowledge of technical requirements of the task
- Formulates and reviews strategic plans and studies, and ensures conformance with professional standards.
- Supervises and audits database entry of records information.
- Develops and implements project plans.
- Conducts structured walk-through of completed databases and works with testers and reviewers to document needed modifications.
- Participates in the design, programming, testing modification, and operation of databases.
- Provides analysis and support for internet/intranet/web site records, and electronic schedules.
- Develops and implements automated schedule systems and automated records management programs.
- Evaluates input and develops alternative design and applications proposals.
- Conducts research and develops product according to specifications.
- Identifies problems and presents and implements recommendations for their solution.
- Works independently and is able to exercise discretion, initiative, and judgment.
- Develops records schedules to according to federal regulations.
- Plans staff work schedules and coordinates assignments.
- Devises archival and records management policies and procedures.
- Appraises records for archival value.
- Develops thesauri.



## Archivist/Records Manager II

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Minimum/  
General  
Experience: One years of progressive archival and/or records management experience.  
Knowledge of professional archival and records management methods, practices, and procedures

Minimum  
Education: Master's Degree in library science or a related field with archival coursework.

- Responsibilities:
- Conducts structured walk-through of completed databases and works with testers and reviewers to document needed modifications.
  - Participates in the design, programming, testing modification, and operation of databases.
  - Provides analysis and support for internet/intranet/web site records, and electronic schedules.
  - Develops and implements automated schedule systems and automated records management programs.
  - Evaluates input and develops alternative design and applications proposals.
  - Conducts research and develops product according to specifications.
  - Identifies problems and presents and implements recommendations for their solution.
  - Works independently and is able to exercise discretion, initiative, and judgment.
  - Develops records schedules to according to federal regulations.
  - Plans staff work schedules and coordinates assignments.
  - Devises archival and records management policies and procedures.
  - Appraises records for archival value.
  - Develops thesauri.
  - Assists in the preparation of processing plans and records retention schedules.
  - Implements processing plans, retention schedules, and file plans individually or as a member of a team.
  - Performs requirements analysis as part of a team.
  - Synthesizes analysis results and program specifications as part of a team. Confers with technical personnel in planning and integrating database design and program modules.
  - Assists in the development of records disaster recovery plans.
  - Creates descriptive materials through application of metadata standards.
  - Creates EAD encoded finding aids
  - Conducts research and develops solutions for simple to moderately



- complex problems.
- Performs basic archival processing under supervision including determining proper level of arrangement within record groups and series and organizes records accordingly.
- Provides reference services under supervision, explains holdings and finding aids to researchers, enforces security regulations.
- Conducts records surveys under supervision.
- Boxes and prepares records for transfer to the archives/records center.
- Prepares records transfer lists.

Archivist/Records Manager I

Minimum/General Experience: Three months of archival or records management experience. Basic knowledge of professional archival and records management methods, practices, and procedures.

Minimum Education: Master’s Degree in library science or a related field with archival coursework.

- Responsibilities:
- Assists in the preparation of processing plans and records retention schedules.
  - Implements processing plans, retention schedules, and file plans individually or as a member of a team.
  - Performs requirements analysis as part of a team.
  - Synthesizes analysis results and program specifications as part of a team. Confers with technical personnel in planning and integrating database design and program modules.
  - Assists in the development of records disaster recovery plans.
  - Creates descriptive materials through application of metadata standards.
  - Creates EAD encoded finding aids
  - Conducts research and develops solutions for simple to moderately complex problems.
  - Performs basic archival processing under supervision including determining proper level of arrangement within record groups and series and organizes records accordingly.
  - Provides reference services under supervision, explains holdings and finding aids to researchers, enforces security regulations.
  - Conducts records surveys under supervision.
  - Boxes and prepares records for transfer to the archives/records center.
  - Prepares records transfer lists.





### Archivist/Records Tech II

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Minimum/General Experience: Minimum six months of archival or records management experience. Basic knowledge of professional archival and records management methods, practices, and procedures.

Minimum Education: Bachelor's Degree

- Responsibilities: Under supervision:
- Rehouses collections material
  - Performs rudimentary preservation work including fastener removal and preservation photocopying
  - Assists in records inventories
  - Conducts research and develops solutions for simple problems
  - Assists in boxing and preparing records for transfer to the archives/records center
  - Scans documents

### Archivist/Records Tech I

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Minimum/General Experience: Three months of archival or records management experience. Basic knowledge of professional archival and records management methods, practices, and procedures.

Minimum Education: Bachelor's Degree

- Responsibilities: Under supervision:
- Re-houses collections material
  - Performs rudimentary preservation work including fastener removal and preservation photocopying
  - Assists in records inventories
  - Conducts research and develops solutions for simple problems
  - Assists in boxing and preparing records for transfer to the archives/records center
  - Scans documents



## Project Support

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Minimum/  
General  
Experience: Two years general office experience.

Minimum  
Education: Bachelor's Degree

Responsibilities:

- Interfaces with contractor and government personnel.
- Identifies work flow requirements and schedules job streams.
- Interprets technical documentation standards and prepares documentation according to standards.
- Reviews programs and products to ensure quality.
- Controls records and source data used in preparation of recurring reports, records, and schedules.
- Operates reproduction equipment to provide document support functions.
- Prepares graphic presentations of data.
- Performs writing and editing functions.
- Enters and verifies data.
- Provides indexing and abstracting of documents.