

AUTHORIZED FEDERAL SUPPLY SERVICE
 INFORMATION TECHNOLOGY SCHEDULE PRICELIST
 GENERAL PURPOSE COMMERCIAL INFORMATION TECHNOLOGY
 EQUIPMENT, SOFTWARE AND SERVICES

SIN 132-51 - INFORMATION TECHNOLOGY (IT) PROFESSIONAL SERVICES

- FPDS Code D301 IT Facility Operation and Maintenance
- FPDS Code D302 IT Systems Development Services
- FPDS Code D306 IT Systems Analysis Services
- FPDS Code D307 Automated Information Systems Design and Integration Services
- FPDS Code D308 Programming Services
- FPDS Code D310 IT Backup and Security Services
- FPDS Code D311 IT Data Conversion Services
- FPDS Code D313 Computer Aided Design/Computer Aided Manufacturing (CAD/CAM) Services
- FPDS Code D316 IT Network Management Services
- FPDS Code D317 Creation/Retrieval of IT Related Automated News Services, Data Services, or Other Information Services (All other information services belong under Schedule 76)
- FPDS Code D399 Other Information Technology Services, Not Elsewhere Classified

Note 1: All non-professional labor categories must be incidental to and used solely to support hardware, software and/or professional services, and cannot be purchased separately.

Note 2: Offerors and Agencies are advised that the Group 70 – Information Technology Schedule is not to be used as a means to procure services which properly fall under the Brooks Act. These services include, but are not limited to, architectural, engineering, mapping, cartographic production, remote sensing, geographic information systems, and related services. FAR 36.6 distinguishes between mapping services of an A/E nature and mapping services which are not connected nor incidental to the traditionally accepted A/E Services.

Note 3: This solicitation is not intended to solicit for the reselling of IT Professional Services, except for the provision of implementation, maintenance, integration, or training services in direct support of a product. Under such circumstances the services must be performance by the publisher or manufacturer or one of their authorized agents.

Portfolio Management Consulting, LLC
 11809 Troika Court, Suite 100
 Lake Ridge, Virginia 22192-6284
 (703) 580-6700 (voice)
 (703) 997-4526 (Facsimile)
 info@pmcllc.us (email)

www.pmcllc.us → IDIQ & GSA Schedules button (Internet on-line Pricelist)

| | | | |
|--|--|--------|--|
| Contract Number: | GS-35F-0438S | | |
| Period Covered by Contract: | May 30, 2011 through May 29, 2016 | | |
| Pricelist current through Modification Number: | | Dated: | |

General Services Administration
 Federal Supply Service

Products and ordering information in this Authorized FSS Information Technology Schedule Pricelist are also available on the GSA Advantage! System. Agencies can browse GSA Advantage! by accessing the Federal Supply Service’s Home Page via the Internet at <http://www.fss.gsa.gov/>

Table of Contents

| | |
|---|-----------|
| Information for Ordering Offices | 1 |
| Terms and Conditions Applicable to Information Technology (IT) Professional Services (Special Item 132-51) | 11 |
| Labor Category Descriptions | 18 |
| Services Price List (Hourly Firm Fixed Prices) | 24 |
| USA Commitment to Promote Small Business Participation Procurement Programs | 26 |
| Best Value Blanket Purchase Agreement | 27 |
| Basic Guidelines for Using Contractor Team Arrangements | 30 |

**INFORMATION FOR ORDERING ACTIVITIES
APPLICABLE TO ALL SPECIAL ITEM NUMBERS**

Special Notice to Agencies: Small Business Participation

SBA strongly supports the participation of small business concerns in the Federal Supply Schedules Program. To enhance Small Business Participation SBA policy allows agencies to include in their procurement base and goals, the dollar value of orders expected to be placed against the Federal Supply Schedules, and to report accomplishments against these goals.

For orders exceeding the micropurchase threshold, FAR 8.404 requires agencies to consider the catalogs/pricelists of at least three schedule contractors or consider reasonably available information by using the GSA Advantage!™ on-line shopping service (www.fss.gsa.gov). The catalogs/pricelists, GSA Advantage!™ and the Federal Supply Service Home Page (www.fss.gsa.gov) contain information on a broad array of products and services offered by small business concerns.

This information should be used as a tool to assist ordering activities in meeting or exceeding established small business goals. It should also be used as a tool to assist in including small, small disadvantaged, and women-owned small businesses among those considered when selecting pricelists for a best value determination.

For orders exceeding the micropurchase threshold, customers are to give preference to small business concerns when two or more items at the same delivered price will satisfy their requirement.

1. Geographic Scope of Contract:

Domestic delivery is delivery within the 48 contiguous states, Alaska, Hawaii, Puerto Rico, Washington, DC, and U.S. Territories. Domestic delivery also includes a port or consolidation point, within the aforementioned areas, for orders received from overseas activities.

Overseas delivery is delivery to points outside of the 48 contiguous states, Washington, DC, Alaska, Hawaii, Puerto Rico, and U.S. Territories.

Offerors are requested to check one of the following boxes:

- The Geographic Scope of Contract will be domestic and overseas delivery.
- The Geographic Scope of Contract will be overseas delivery only.
- The Geographic Scope of Contract will be domestic delivery only.

The minimum acceptable geographic scope of this contract is the 48 contiguous states and the District of Columbia. Please note that the services and products offered herein are also available at overseas locations outside the scope of this contract. Overseas service rates will be negotiated between the Contractor and the ordering agency.

2. Contractor's Ordering Address and Payment Information:

For computer to computer EDI orders: **None**

For orders by facsimile transmission:

| | | |
|---|--------------------------------|--|
| Portfolio Management Consulting, LLC | Fax No.: (703) 997-4526 | To verify receipt: (703) 580-6700 |
|---|--------------------------------|--|

For mailed orders:

| |
|--|
| Portfolio Management Consulting, LLC Attention: GWAC Service Center 11809 Troika Court, Suite 100 Lake Ridge, Virginia 22192-6284 |
|--|

Payment Addresses:

| Via Mail | Via Federal Express | Via Wire/ACH |
|--|--|--------------|
| Portfolio Management Consulting, LLC 11809 Troika Court, Suite 100 Lake Ridge, Virginia 22192-6284 | Portfolio Management Consulting, LLC 11809 Troika Court, Suite 100 Lake Ridge, Virginia 22192-6284 | |

Internet Address:

info@pmcllc.us

www.pmcllc.us → IDIQ and GSA Schedules button (Internet on-line Pricelist)

Contractors are required to accept credit cards for payments equal to or less than the micro-purchase threshold for oral or written delivery orders. Credit cards will not be acceptable for payment above the micro-purchase threshold. In addition, bank account information for wire transfer payments will be shown on the invoice.

The following telephone number can be used by ordering activities to obtain technical and/or ordering assistance:

(703) 580-6700 (ask for GWAC Service Center)

3. Liability for Injury or Damage:

The Contractor shall not be liable for any injury to ordering activity personnel or damage to ordering activity property arising from the use of equipment maintained by the Contractor, unless such injury or damage is due to the fault or negligence of the Contractor.

4. Statistical Data for Government Ordering Office Completion of Standard Form 279:

- Block 9: G. Order/Modification Under Federal Schedule
- Block 16: Data Universal Numbering System (DUNS) Plus Four Number - **146130286**
- Block 30: Type of Contractor - **B. Other Small Business**
- Block 31: Woman-Owned Small Business - **No**
- Block 36: Contractor's Taxpayer Identification Number (TIN) - **20-0982637**

4a. CAGE Code:

3ZRH1

4b. CCR Registration:

Portfolio Management Consulting, LLC has registered with the Central Contractor Registration (CCR) Database.

5. FOB Destination

Delivery FOB Destination - 48 contiguous states and the District of Columbia.

Delivery FOB Point of Inland Carrier, Point of Exportation (FAR 52.247.38) – transportation charges to be paid by the Government from point of exportation to destination in Alaska, Hawaii, Commonwealth of Puerto Rico, and such overseas locations specified, as designated by the ordering office.

6. Delivery Schedule:

The Contractor shall deliver to destination within the number of calendar days after receipt of order (ARO), as set forth below.

6a. Time of Delivery:

| Special Item Number | Delivery Time (Days ARO) |
|---------------------|-----------------------------|
| 132-51 | Date of award to completion |

6b. Expedited Delivery Times:

Ordering offices will be required to pay the differential between freight charges and express charges where express deliveries are desired by the Government.

6c. Overnight and 2-Day Delivery Times:

Negotiated, on a case-by-case basis, at additional cost.

6d. Urgent Requirements:

When the Federal Supply Schedule contract delivery period does not meet the bona fide urgent delivery requirements of an ordering activity, ordering activities are encouraged, if time permits, to contact the Contractor for the purpose of obtaining accelerated delivery. The Contractor shall reply to the inquiry within 3 workdays after receipt. (Telephonic replies shall be confirmed by the Contractor in writing.) If the Contractor offers an accelerated delivery time acceptable to the ordering activity, any order(s) placed pursuant to the agreed upon accelerated delivery time frame shall be delivered within this shorter delivery time and in accordance with all other terms and conditions of the contract.

7. Discounts:

Prices shown are NET prices; basic discounts have been deducted.

| | |
|--------------------------------------|------------------------------------|
| Prompt Payment: | None |
| Quantity: | None |
| Dollar Volume: | None |
| Government Educational Institutions: | Same as other Government customers |
| Other: | None |

8. Trade Agreements Act of 1979 as Amended:

All items are U.S. made end products, designated country end products, Caribbean Basin country end products, Canadian end products, or Mexican end products as defined in the Trade Agreements Act of 1979, as amended.

9. Statement Concerning Availability of Export Packing:

Outside the scope of this contract.

10. Small Requirements:

Special Item 132-51 – Information Technology (IT) Professional Services

The minimum dollar value per order for all IT Professional Services will be \$100.00.

11. Maximum Order (All dollar amounts are exclusive of any discount for prompt payment.):

Special Item 132-51 – Information Technology (IT) Professional Services

The maximum dollar value per order for all IT Professional Services will be \$500,000.

12. Use of Federal Supply Service Information Technology Schedule Contracts. In accordance with FAR 8.404:

[NOTE: Special ordering procedures have been established for Special Item Numbers (SINs) 132-51 IT Professional Services and 132-52 EC Services; refer to the terms and conditions for those SINs.]

Ordering activities shall use the ordering procedures of Federal Acquisition Regulation (FAR) 8.405 when placing an order or establishing a BPA for supplies or services. These procedures apply to all schedules.

- a. FAR 8.405-1 Ordering procedures for supplies, and services not requiring a statement of work.
- b. FAR 8.405-2 Ordering procedures for services requiring a statement of work.

13. Federal Information Technology/Telecommunication Standards Requirements:

Ordering activities acquiring products from this Schedule must comply with the provisions of the Federal Standards Program, as appropriate (reference: NIST Federal Standards Index). Inquiries to determine whether or not specific products listed herein comply with Federal Information Processing Standards (FIPS) or Federal Telecommunication Standards (FED-STDS), which are cited by ordering activities, shall be responded to promptly by the Contractor.

13.1 Federal Information Processing Standards Publications (FIPS PUBS):

Information Technology products under this Schedule that do not conform to Federal Information Processing Standards (FIPS) should not be acquired unless a waiver has been granted in accordance with the applicable "FIPS Publication." Federal Information Processing Standards Publications (FIPS PUBS) are issued by the U.S. Department of Commerce, National Institute of Standards and Technology (NIST), pursuant to National Security Act. Information concerning their availability and applicability should be obtained from the National Technical Information Service (NTIS), 5285 Port Royal Road, Springfield, Virginia 22161. FIPS PUBS include voluntary standards when these are adopted for Federal use. Individual orders for FIPS PUBS should be referred to the NTIS Sales Office, and orders for subscription service should be referred to the NTIS Subscription Officer, both at the above address, or telephone number (703) 487-4650.

13.2 Federal Telecommunication Standards (FED-STDS):

Telecommunication products under this Schedule that do not conform to Federal Telecommunication Standards (FED-STDS) should not be acquired unless a waiver has been granted in accordance with the applicable "FED-STD." Federal Telecommunication Standards are issued by the U.S. Department of Commerce, National Institute of Standards and Technology (NIST), pursuant to National Security Act. Ordering information and information concerning the availability of FED-STDS should be obtained from the GSA, Federal Supply Service, Specification Section, 470 East L'Enfant Plaza, Suite 8100, SW, Washington, DC 20407, telephone number (202)619-8925. Please include a self-addressed mailing label when requesting information by mail. Information concerning their applicability can be obtained by writing or calling the U.S. Department of Commerce, National Institute of Standards and Technology, Gaithersburg, MD 20899, telephone number (301)975-2833.

14. Contractor Tasks/Special Requirements (C-FSS-370) (NOV 2001)

14a. Security Clearances

The Contractor may be required to obtain/possess varying levels of security clearances in the performance of orders issued under this contract. All costs associated with obtaining/possessing such security clearances should be factored into the price offered under the Multiple Award Schedule.

14b. Travel

The Contractor may be required to travel in performance of orders issued under this contract. Allowable travel and per diem charges are governed by Pub .L. 99-234 and FAR Part 31, and are reimbursable by the ordering agency or can be priced as a fixed price item on orders placed under the Multiple Award Schedule. The Industrial Funding Fee does NOT apply to travel and per diem charges.

14c. Certifications, Licenses and Accreditations

As a commercial practice, the Contractor may be required to obtain/possess any variety of certifications, licenses and accreditations for specific FSC/service code classifications offered. All costs associated with obtaining/possessing such certifications, licenses and accreditations should be factored into the price offered under the Multiple Award Schedule program.

14d. Insurance

As a commercial practice, the Contractor may be required to obtain/possess insurance coverage for specific FSC/service code classifications offered. All costs associated with obtaining/possessing such insurance should be factored into the price offered under the Multiple Award Schedule program.

14e. Personnel

The Contractor may be required to provide key personnel, resumes or skill category descriptions in the performance of orders issued under this contract. Ordering activities may require agency approval of additions or replacements to key personnel.

14f. Organizational Conflicts of Interest

Where there may be an organizational conflict of interest as determined by the ordering agency, the Contractor's participation in such order may be restricted in accordance with FAR Part 9.5.

14g. Documentation/Standards

The Contractor may be requested to provide products or services in accordance with rules, regulations, OMB orders, standards and documentation as specified by the agency's order.

14h. Data/Deliverable Requirements

Any required data/deliverables at the ordering level will be as specified or negotiated in the agency's order.

14i. Government-Furnished Property

As specified by the agency's order, the Government may provide property, equipment, materials or resources as necessary.

14j. Availability of Funds

Many Government agencies' operating funds are appropriated for a specific fiscal year. Funds may not be presently available for any orders placed under the contract or any option year. The Government's obligation on orders placed under this contract is contingent upon the availability of appropriated funds from which payment for ordering purposes can be made. No legal liability on the part of the Government for any payment may arise until funds are available to the ordering Contracting Officer.

15. Contract Administration for Ordering Activities

Any ordering activity, with respect to any one or more delivery orders placed by it under this contract, may exercise the same rights of termination as might the GSA Contracting Officer under provisions of FAR 52.212-4, paragraphs (l) Termination for the ordering activity's convenience, and (m) Termination for Cause (See C.1.)

16. GSA Advantage!

GSA Advantage! is an on-line, interactive electronic information and ordering system that provides on-line access to vendors' schedule prices with ordering information. GSA Advantage! will allow the user to perform various searches across all contracts including, but not limited to:

- (1) Manufacturer;
- (2) Manufacturer's Part Number; and
- (3) Product categories.

Agencies can browse GSA Advantage! by accessing the Internet World Wide Web utilizing a browser (ex.: NetScape). The Internet address is <http://www.fss.gsa.gov/>.

17. Purchase of Open Market Items

NOTE: Open Market Items are also known as incidental items, noncontract items, non-Schedule items, and items not on a Federal Supply Schedule contract.

For administrative convenience, an ordering activity contracting officer may add items not on the Federal Supply Multiple Award Schedule (MAS) -- referred to as open market items -- to a Federal Supply Schedule blanket purchase agreement (BPA) or an individual task or delivery order, **only if-**

- (1) All applicable acquisition regulations pertaining to the purchase of the items not on the Federal Supply Schedule have been followed (e.g., publicizing (Part 5), competition requirements (Part 6), acquisition of commercial items (Part 12), contracting methods (Parts 13, 14, and 15), and small business programs (Part 19));
- (2) The ordering activity contracting officer has determined the price for the items not on the Federal Supply Schedule is fair and reasonable;
- (3) The items are clearly labeled on the order as items not on the Federal Supply Schedule; and
- (4) All clauses applicable to items not on the Federal Supply Schedule are included in the order.

18. Contractor Commitments, Warranties and Representations

- a. For the purpose of this contract, commitments, warranties and representations include, in addition to those agreed to for the entire schedule contract:
 - (1) Time of delivery/installation quotations for individual orders;
 - (2) Technical representations and/or warranties of products concerning performance, total system performance and/or configuration, physical, design and/or functional characteristics and capabilities of a product/equipment/ service/software package submitted in response to requirements which result in orders under this schedule contract.
 - (3) Any representations and/or warranties concerning the products made in any literature, description, drawings and/or specifications furnished by the Contractor.
- b. The above is not intended to encompass items not currently covered by the GSA Schedule contract.

19. Overseas Activities

The terms and conditions of this contract shall apply to all orders for installation, maintenance and repair of equipment in areas listed in the pricelist outside the 48 contiguous states and the District of Columbia, except as indicated below:

The terms and conditions do not apply to Point of Inland Carrier, Point of Exportation (FAR 52.247-38) or overseas locations.

Upon request of the Contractor, the ordering activity may provide the Contractor with logistics support, as available, in accordance with all applicable ordering activity regulations. Such ordering activity support will be provided on a reimbursable basis, and will only be provided to the Contractor's technical personnel whose services are exclusively required for the fulfillment of the terms and conditions of this contract.

20. Blanket Purchase Agreements (BPAs)

The use of BPAs under any schedule contract to fill repetitive needs for supplies or services is allowable. 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 BPA and should be based on a strategy that is expected to maximize the effectiveness of the BPA(s). Ordering activities shall follow FAR 8.405-3 when creating and implementing BPA(s).

21. Contractor Team Arrangements

Contractors participating in contractor team arrangements must abide by all terms and conditions of their respective contracts. This includes compliance with Clauses 552.238-74, Contractor's Reports of Sales and 552.238-76, Industrial Funding Fee, i.e., each contractor (team member) must report sales and remit the IFF for all products and services provided under its individual contract.

22. Installation, Deinstallation, Reinstallation

The Davis-Bacon Act (40 U.S.C. 276a-276a-7) provides that contracts in excess of \$2,000 to which the United States or the District of Columbia is a party for construction, alteration, or repair (including painting and decorating) of public buildings or public works with the United States, shall contain a clause that no laborer or mechanic employed directly upon the site of the work shall received less than the prevailing wage rates as determined by the Secretary of Labor. The requirements of the Davis-Bacon Act do not apply if the construction work is incidental to the furnishing of supplies, equipment, or services. For example, the requirements do not apply to simple installation or alteration of a public building or public work that is incidental to furnishing supplies or equipment under a supply contract. However, if the construction, alteration or repair is segregable and exceeds \$2,000, then the requirements of the Davis-Bacon Act applies.

The ordering activity issuing the task order against this contract will be responsible for proper administration and enforcement of the Federal labor standards covered by the Davis-Bacon Act. The proper Davis-Bacon wage determination will be issued by the ordering activity at the time a request for quotations is made for applicable construction classified installation, deinstallation, and reinstallation services under SIN 132-8.

23. Section 508 Compliance

If applicable, Section 508 compliance information on the supplies and services in this contract are available in Electronic and Information Technology (EIT) at the following: www.Section508.gov/.

24. Prime Contractor Ordering from Federal Supply Schedules

Prime Contractors (on cost reimbursement contracts) placing orders under Federal Supply Schedules, on behalf of an ordering activity, shall follow the terms of the applicable schedule and authorization and include with each order

- (a) A copy of the authorization from the ordering activity with whom the contractor has the prime contract (unless a copy was previously furnished to the Federal Supply Schedule contractor); and
- (b) The following statement:

This order is placed under written authorization from _____ dated _____. In the event of any inconsistency between the terms and conditions of this order and those of your Federal Supply Schedule contract, the latter will govern.

25. Insurance—Work on a Government Installation (JAN 1997) (FAR 52.228-5)

- (a) The Contractor shall, at its own expense, provide and maintain during the entire performance of this contract, at least the kinds and minimum amounts of insurance required in the Schedule or elsewhere in the contract.
- (b) Before commencing work under this contract, the Contractor shall notify the Contracting Officer in writing that the required insurance has been obtained. The policies evidencing required insurance shall contain an endorsement to the effect that any cancellation or any material change adversely affecting the Government's interest shall not be effective—
 - (i.) For such period as the laws of the State in which this contract is to be performed prescribe; or
 - (ii.) Until 30 days after the insurer or the Contractor gives written notice to the Contracting Officer, whichever period is longer.
- (c) The Contractor shall insert the substance of this clause, including this paragraph (c), in subcontracts under this contract that require work on a Government installation and shall require subcontractors to provide and maintain the insurance required in the Schedule or elsewhere in the contract. The Contractor shall maintain

a copy of all subcontractors' proofs of required insurance, and shall make copies available to the Contracting Officer upon request.

26. Software Interoperability

Offerors are encouraged to identify within their software items any component interfaces that support open standard interoperability. An item's interface may be identified as interoperable on the basis of participation in a Government agency-sponsored program or in an independent organization program. Interfaces may be identified by reference to an interface registered in the component registry located at <http://www.core.gov>.

27. Advance Payments

A payment under this contract to provide a service or deliver an article for the United States Government may not be more than the value of the service already provided or the article already delivered. Advance or pre-payment is not authorized or allowed under this contract. (31 U.S.C. 3324)

TERMS AND CONDITIONS APPLICABLE TO INFORMATION TECHNOLOGY (IT) PROFESSIONAL SERVICES (SPECIAL ITEM NUMBER 132-51) AND ELECTRONIC COMMERCE (EC) SERVICES (SPECIAL ITEM NUMBER 132-52)

1. Scope

- (a) The prices, terms and conditions stated under Special Item Number 132-51 Information Technology Professional Services apply exclusively to IT Services within the scope of this Information Technology Schedule.
- (b) The Contractor shall provide services at the Contractor's facility and/or at the ordering activity location, as agreed to by the Contractor and the ordering activity.

2. Performance Incentives

- (a) Performance incentives may be agreed upon between the Contractor and the ordering activity on individual fixed price orders or Blanket Purchase Agreements under this contract in accordance with this clause.
- (b) The ordering activity must establish a maximum performance incentive price for these services and/or total solutions on individual orders or Blanket Purchase Agreements.
- (c) Incentives should be designed to relate results achieved by the contractor to specified targets. To the maximum extent practicable, ordering activities shall consider establishing incentives where performance is critical to the ordering activity's mission and incentives are likely to motivate the contractor. Incentives shall be based on objectively measurable tasks.

3. Ordering Procedures for Services (Requiring a Statement of Work) (G-FCI-920) (MAR 2003)

FAR 8.402 contemplates that GSA may occasionally find it necessary to establish special ordering procedures for individual Federal Supply Schedules or for some Special Item Numbers (SINs) within a Schedule. GSA has established special ordering procedures for services that require a Statement of Work. These special ordering procedures take precedence over the procedures in FAR 8.404 (b)(2) through (b)(3).

When ordering services over \$100,000, Department of Defense (DOD) ordering offices and non-DOD agencies placing orders on behalf of the DOD must follow the policies and procedures in the Defense Federal Acquisition Regulation Supplement (DFARS) 208.404-70 – Additional ordering procedures for services. When DFARS 208.404-70 is applicable and there is a conflict between the ordering procedures contained in this clause and the additional ordering procedures for services in DFARS 208.404-70, the DFARS procedures take precedence.

GSA has determined that the prices for services contained in the contractor's price list applicable to this Schedule are fair and reasonable. However, the ordering activity using this contract is responsible for considering the level of effort and mix of labor proposed to perform a specific task being ordered and for making a determination that the total firm-fixed price or ceiling price is fair and reasonable.

- (a) When ordering services, ordering activities shall—
 - (1) Prepare a Request (Request for Quote or other communication tool):
 - i. A statement of work (a performance-based statement of work is preferred) that outlines, at a minimum, the work to be performed, location of work, period of performance, deliverable schedule, applicable standards, acceptance criteria, and any special requirements (i.e., security clearances, travel, special knowledge, etc.) should be prepared.
 - ii. The request should include the statement of work and request the contractors to submit either a firm-fixed price or a ceiling price to provide the services outlined in the statement of work. A firm-fixed price order shall be requested, unless the ordering activity makes a determination that it is not possible at the time of placing the order to estimate accurately the extent or duration of the work or to anticipate cost with any reasonable degree of confidence. When such a determination is made, a labor hour or time-and-materials proposal may be requested. The firm-fixed price shall

be based on the rates in the schedule contract and shall consider the mix of labor categories and level of effort required to perform the services described in the statement of work. The firm-fixed price of the order should also include any travel costs or other incidental costs related to performance of the services ordered, unless the order provides for reimbursement of travel costs at the rates provided in the Federal Travel or Joint Travel Regulations. A ceiling price must be established for labor-hour and time-and-materials orders.

- iii. The request may ask the contractors, if necessary or appropriate, to submit a project plan for performing the task, and information on the contractor's experience and/or past performance performing similar tasks.
- iv. The request shall notify the contractors what basis will be used for selecting the contractor to receive the order. The notice shall include the basis for determining whether the contractors are technically qualified and provide an explanation regarding the intended use of any experience and/or past performance information in determining technical qualification of responses. If consideration will be limited to schedule contractors who are small business concerns as permitted by paragraph (2) below, the request shall notify the contractors that will be the case.

(2) Transmit the Request to Contractors:

- i. Based upon an initial evaluation of catalogs and price lists, the ordering activity should identify the contractors that appear to offer the best value (considering the scope of services offered, pricing and other factors such as contractors' locations, as appropriate) and transmit the request as follows:
- ii. NOTE: When buying IT professional services under SIN 132—51 ONLY, the ordering office, at its discretion, may limit consideration to those schedule contractors that are small business concerns. This limitation is not applicable when buying supplies and/or services under other SINs as well as SIN 132-51. The limitation may only be used when at least three (3) small businesses that appear to offer services that will meet the agency's needs are available, if the order is estimated to exceed the micro-purchase threshold.
- iii. The request should be provided to at least three (3) contractors if the proposed order is estimated to exceed the micro-purchase threshold, but not exceed the maximum order threshold.
- iv. For proposed orders exceeding the maximum order threshold, the request should be provided to additional contractors that offer services that will meet the ordering activity's needs.
- v. In addition, the request shall be provided to any contractor who specifically requests a copy of the request for the proposed order.
- vi. Ordering activities should strive to minimize the contractors' costs associated with responding to requests for quotes for specific orders. Requests should be tailored to the minimum level necessary for adequate evaluation and selection for order placement. Oral presentations should be considered, when possible.

(3) Evaluate Responses and Select the Contractor to Receive the Order:

After responses have been evaluated against the factors identified in the request, the order should be placed with the schedule contractor that represents the best value. (See FAR 8.404)

- (b) The establishment of Federal Supply Schedule Blanket Purchase Agreements (BPAs) for recurring services is permitted when the procedures outlined herein are followed. All BPAs for services must define the services that may be ordered under the BPA, along with delivery or performance time frames, billing procedures, etc. The potential volume of orders under BPAs, regardless of the size of individual orders, may offer the ordering activity the opportunity to secure volume discounts. When establishing BPAs, ordering activities shall—
 - (1) Inform contractors in the request (based on the ordering activity's requirement) if a single BPA or multiple BPAs will be established, and indicate the basis that will be used for selecting the contractors to be awarded the BPAs.

- i. SINGLE BPA: Generally, a single BPA should be established when the ordering activity can define the tasks to be ordered under the BPA and establish a firm-fixed price or ceiling price for individual tasks or services to be ordered. When this occurs, authorized users may place the order directly under the established BPA when the need for service arises. The schedule contractor that represents the best value should be awarded the BPA. (See FAR 8.404)
 - ii. MULTIPLE BPAs: When the ordering activity determines multiple BPAs are needed to meet its requirements, the ordering activity should determine which contractors can meet any technical qualifications before establishing the BPAs. When establishing the BPAs, the procedures in (a)(2) above must be followed. The procedures at (a)(2) do not apply to orders issued under multiple BPAs. Authorized users must transmit the request for quote for an order to all BPA holders and then place the order with the Schedule contractor that represents the best value.
- (2) Review BPAs Periodically: Such reviews shall be conducted at least annually. The purpose of the review is to determine whether the BPA still represents the best value. (See FAR 8.404)
- (c) The ordering activity should give preference to small business concerns when two or more contractors can provide the services at the same firm-fixed price or ceiling price.
 - (d) When the ordering activity's requirement involves both products as well as executive, administrative and/or professional, services, the ordering activity should total the prices for the products and the firm-fixed price for the services and select the contractor that represents the best value. (See FAR 8.404)
 - (e) The ordering activity, at a minimum, should document orders by identifying the contractor from which the services were purchased, the services purchased, and the amount paid. If other than a firm-fixed price order is placed, such documentation should include the basis for the determination to use a labor-hour or time-and-materials order. For ordering activity requirements in excess of the micro-purchase threshold, the order file should document the evaluation of Schedule contractors' quotes that formed the basis for the selection of the contractor that received the order and the rationale for any trade-offs made in making the selection.

4. Order

- (a) Agencies may use written orders, EDI orders, blanket purchase agreements, individual purchase orders, or task orders for ordering services under this contract. Blanket Purchase Agreements shall not extend beyond the end of the contract period; all services and delivery shall be made and the contract terms and conditions shall continue in effect until the completion of the order. Orders for tasks which extend beyond the fiscal year for which funds are available shall include FAR 52.232-19 Availability of Funds for the Next Fiscal Year. The purchase order shall specify the availability of funds and the period for which funds are available.
- (b) All task orders are subject to the terms and conditions of the contract. In the event of conflict between a task order and the contract, the contract will take precedence.

5. Performance of Services

- (a) The Contractor shall commence performance of services on the date agreed to by the Contractor and the ordering activity.
- (b) The Contractor agrees to render services only during normal working hours, unless otherwise agreed to by the Contractor and the ordering activity.
- (c) The ordering activity should include the criteria for satisfactory completion for each task in the Statement of Work or Delivery Order. Services shall be completed in a good and workmanlike manner.
- (d) Any Contractor travel required in the performance of IT Services must comply with the Federal Travel Regulation or Joint Travel Regulations, as applicable, in effect on the date(s) the travel is performed. Established Federal Government per diem rates will apply to all Contractor travel. Contractors cannot use GSA city pair contracts.

6. Inspection of Services

The Inspection of Services–Fixed Price (AUG 1996) clause at FAR 52.246-4 applies to firm-fixed price orders placed under this contract. The Inspection–Time-and-Materials and Labor-Hour (JAN 1986) clause at FAR 52.246-6 applies to time-and-materials and labor-hour orders placed under this contract.

7. Responsibilities of the Contractor

The Contractor shall comply with all laws, ordinances, and regulations (Federal, State, City, or otherwise) covering work of this character. If the end product of a task order is software, then FAR 52.227-14 Rights in Data – General, may apply.

8. Responsibilities of the Ordering Activity

Subject to security regulations, the ordering activity shall permit Contractor access to all facilities necessary to perform the requisite IT Services.

9. Independent Contractor

All IT Services performed by the Contractor under the terms of this contract shall be as an independent Contractor, and not as an agent or employee of the ordering activity.

10. Organizational Conflicts of Interest

(a) Definitions.

“Contractor” means the person, firm, unincorporated association, joint venture, partnership, or corporation that is a party to this contract.

“Contractor and its affiliates” and “Contractor or its affiliates” refers to the Contractor, its chief executives, directors, officers, subsidiaries, affiliates, subcontractors at any tier, and consultants and any joint venture involving the Contractor, any entity into or with which the Contractor subsequently merges or affiliates, or any other successor or assignee of the Contractor.

An “Organizational conflict of interest” exists when the nature of the work to be performed under a proposed ordering activity contract, without some restriction on ordering activities by the Contractor and its affiliates, may either (i) result in an unfair competitive advantage to the Contractor or its affiliates or (ii) impair the Contractor’s or its affiliates’ objectivity in performing contract work.

(b) To avoid an organizational or financial conflict of interest and to avoid prejudicing the best interests of the ordering activity, ordering activities may place restrictions on the Contractors, its affiliates, chief executives, directors, subsidiaries and subcontractors at any tier when placing orders against schedule contracts. Such restrictions shall be consistent with FAR 9.505 and shall be designed to avoid, neutralize, or mitigate organizational conflicts of interest that might otherwise exist in situations related to individual orders placed against the schedule contract. Examples of situations, which may require restrictions, are provided at FAR 9.508.

11. Invoices

The Contractor, upon completion of the work ordered, shall submit invoices for IT services. Progress payments may be authorized by the ordering activity on individual orders if appropriate. Progress payments shall be based upon completion of defined milestones or interim products. Invoices shall be submitted monthly for recurring services performed during the preceding month.

12. Payments

For firm-fixed price orders the ordering activity shall pay the Contractor, upon submission of proper invoices or vouchers, the prices stipulated in this contract for service rendered and accepted. Progress payments shall be made only when authorized by the order. For time-and-materials orders, the Payments under Time-and-Materials and Labor-Hour Contracts at FAR 52.232-7 (DEC 2002), Alternate I (APR 1984) applies to time-and-materials orders placed under this contract. For labor-hour orders, the Payment under Time-and-Materials and Labor-Hour

Contracts at FAR 52.232-7 (DEC 2002), Alternate II (DEC 2002) applies to labor-hour orders placed under this contract.

13. Resumes

Resumes shall be provided to the GSA Contracting Officer or the user ordering activity upon request.

14. Incidental Support Costs

Incidental support costs are available outside the scope of this contract. The costs will be negotiated separately with the ordering activity in accordance with the guidelines set forth in the FAR.

15. Approval of Subcontracts

The ordering activity may require that the Contractor receive, from the ordering activity's Contracting Officer, written consent before placing any subcontract for furnishing any of the work called for in a task order.

16. Description of IT Services and Pricing

Portfolio Management Consulting, LLC offers a full range of IT services under the GSA Information Technology Schedule contract, including all areas under Special Item Number (SIN) 132-51 as follows:

IT Facility Operation and Maintenance (FPDS Code D301): Portfolio Management Consulting, LLC offers resources and facilities/systems management services across a wide range of architectures, and commercial ADP equipment and software. We provide facility planning; client/server migrations; operational support; technical support; end user support; help desk operations; computer operations; remedial and preventive maintenance management; security management; communications operations; system performance analysis and management; systems tuning; systems programming; product evaluation and recommendations; capacity planning; and security analysis, implementation, and management.

IT Systems Development Services (FPDS Code D302). Portfolio Management Consulting, LLC provides full systems development life cycle services including requirements analysis, process analysis and design, cost/benefit analysis, product evaluation and analysis, quality assurance planning, test planning, training, logical and physical database design, programming, configuration management, and implementation and support. Consistent and flexible methodologies are employed organization-wide according to the Software Engineering Institute (SEI) Capability Maturity Model, for consistent results. For each project, Portfolio Management Consulting, LLC furnishes complete documentation and deliverables in accordance with the approved methodology.

IT Systems Analysis Services (FPDS Code D306): Portfolio Management Consulting, LLC offers the analysis and design of a broad variety of information, business, and scientific systems applications. Portfolio Management Consulting, LLC analyzes business processes and, through intensive interaction with the user and technical communities, documents current and improved processes, defines requirements, and submits the results to the customer for review and approval. Upon approval, Portfolio Management Consulting, LLC designs the application using state-of-the-art methodologies, techniques, and tools. We will use a customer defined methodology or a Portfolio Management Consulting, LLC flexible and proven methodology. These methodologies can include business process reengineering, prototyping, and pilot tests. Also included in this area are systems and applications software maintenance. For each project, Portfolio Management Consulting, LLC furnishes complete documentation and deliverables in accordance with the approved methodology for users and systems personnel.

Automated Information Systems Design and Integration Services (FPDS Code D307): Portfolio Management Consulting, LLC designs and develops systems for the wide range of applications, fully integrating hardware, software, and communications according to customer needs. All hardware platforms from microcomputer client/server systems to supercomputers are supported. Services for local, metropolitan, and wide area networks include but are not limited to, network requirements analysis, planning, design, engineering, installation, operations, help desk support, performance monitoring, performance tuning, security management, firewall design and construction, and classified support. For each project, Portfolio Management Consulting, LLC furnishes complete documentation and deliverables in accordance with the approved methodology for users and systems personnel.

Programming Services (FPDS Code D308): Using commercially available development languages and automated development, test, and configuration management tools, Portfolio Management Consulting, LLC builds applications based on customer-approved designs. Our structured programming work includes programming the application,

unit testing, module testing, and system testing using Portfolio Management Consulting, LLC's quality assurance procedures and configuration management practices. Programming includes development of network utilities and operating system utilities as a part of systems development life cycle tasks. For each project, Portfolio Management Consulting, LLC furnishes complete documentation and deliverables in accordance with the approved methodology for users and systems personnel.

IT Backup & Security Services (FPDS Code 310): Portfolio Management Consulting, LLC provides a comprehensive suite of security and disaster recovery products and services. These include hardware and software cryptographic services, firewalls, host security, hot site/cold site, full network and local backup protection. All products and integrated systems are fully supported and training is always available. For each project, Portfolio Management Consulting, LLC furnishes complete documentation and deliverables, electronically and in hard copy, according to the approved methodology for users and systems personnel.

IT Data Conversion Services (FPDS Code D311): Portfolio Management Consulting, LLC offers support for conversion of applications programs, databases, network operating systems, and end user computing systems. The services include but are not limited to, analysis of the conversion requirement; cost/benefit analysis of alternatives; development of comprehensive test plans; design and construction of conversion routines and filters; system conversion; migration of the new system/data to the target hardware and software infrastructure; complete system and user acceptance testing; and post-conversion review. For each project, Portfolio Management Consulting, LLC furnishes complete documentation and deliverables in accordance with the approved methodology for users and systems personnel.

Computer Aided Design/Computer Aided Manufacturing (CAD/CAM) Services (FPDS Code D313): Portfolio Management Consulting, LLC offers a full range of 2D and 3D CAD/CAM services. The CAD/CAM services include but are not limited to, 3D solid modeling, full scope automated professional design support services, architectural, engineering, mechanical, facility plans archiving, scanning, and vectorization. CAD/CAM files can be created in any CAD/CAM platform (e.g., AutoCAD, Mechanical Desktop, Microstation, or Intergraph,); files can be converted to any other CAD/CAM format. Output can be either soft copy or full color plots up to e-size or even Internet quality images.

IT Network Management Services (FPDS Code D316): Portfolio Management Consulting, LLC provides the full range of LAN/WAN telecommunications management. We design, install, and manage all sizes of networks for voice, data, and secure communications. Functional needs include backbone, enterprise-wide, Internet, and videoconferencing communications. Network systems administration and monitoring are performed according to enterprise and industry standards. For each project Portfolio Management Consulting, LLC furnishes complete documentation and deliverables in accordance with the approved task order.

Automated News Services, Data Services, or Other Information Services (FPDS Code D317): Portfolio Management Consulting, LLC offers full media support including service analysis, recommendation including cost impact studies, implementation, training, and on-going support. Related services for the management of data and records in automated or manual systems are also provided. The services we offer include but are not limited to, development, implementation, testing, and operation, of data/records management systems. Portfolio Management Consulting, LLC will provide a range of support services for a variety of database management systems. For each project, Portfolio Management Consulting, LLC furnishes complete documentation and deliverables in accordance with the approved methodology.

Other Information Technology Services, Not Elsewhere Classified (FPDS Code D399):

Systems Installation. Portfolio Management Consulting, LLC offers complete installation services for networks, end user computing systems, and COTS and custom software. The installation includes but is not limited to, the analysis of the system being installed; identification of all related tasks and activities; compilation of all needed materials, software, and hardware; design of a comprehensive testing and verification plan; coordination with all affected organizations; full hardware and software installation; execution of the system test plan; participation in the user acceptance test; and post-installation reviews. For each project, Portfolio Management Consulting, LLC furnishes complete documentation and deliverables in accordance with the approved methodology for users and systems personnel.

Internet Support. Portfolio Management Consulting, LLC offers support for the implementation and maintenance of Internet systems, to include world wide web support; home page design and construction; Intranet design and

implementation; Web and Intranet security management; HTML programming; Java and Perl technical support; graphics visualization and design; and multimedia applications analysis, design, development, and deployment.

Strategic Information Technologies Planning, Program Assessment, and Studies. Portfolio Management Consulting, LLC offers services to support the development, analysis, and implementation of information technologies strategies and architectures. Services include program planning and assessment, risk/trade-off analyses, requirements analyses, alternatives analyses, and feasibility studies. Unique industry expertise may be provided in specialty areas.

Note 1: All non-professional labor categories must be incidental to and used solely to support hardware, software and/or professional services, and cannot be purchased separately.

Note 2: Offerors and Agencies are advised that the Group 70 – Information Technology Schedule is not to be used as a means to procure services which properly fall under the Brooks Act. These services include, but are not limited to, architectural, engineering, mapping, cartographic production, remote sensing, geographic information systems, and related services. FAR 36.6 distinguishes between mapping services of an A/E nature and mapping services which are not connected nor incidental to the traditionally accepted A/E Services.

Labor Category Descriptions Applicable to Information Technology (IT) Professional Services (Special Item Number 132-51)

Title: 1. Program Manager I

Minimum/General Experience: 12 years experience in systems engineering, the business, or the technology directly related to the project. Three years of supervisory experience leading technically oriented projects and personnel. Experienced in directing large efforts as well as multiple concurrent smaller efforts. Knowledgeable of the federal contract and procurement regulations. Competent in program planning, budgets, and schedules.

Functional Responsibility: Manages the direct program support; Responsible for cost and operational effectiveness; Responsible for enforcing work standards, assigning work schedules, and communicating company policies, procedures, and goals to subordinates.

Minimum Education: Bachelor's degree in computer science, engineering, mathematics, business. Three (3) years of applicable experience may be substituted for a degree.

Title: 1a. Program Manager II

Minimum/General Experience: 15 years experience in systems engineering, the business, or the technology directly related to the project. Five years of supervisory experience leading technically oriented projects and personnel. Experienced in directing large efforts as well as multiple concurrent smaller efforts. Knowledgeable of the federal contract and procurement regulations. Competent in program planning, budgets, and schedules.

Functional Responsibility: Manages the direct program support; Responsible for cost and operational effectiveness; Responsible for enforcing work standards, assigning work schedules, and communicating company policies, procedures, and goals to subordinates.

Minimum Education: Bachelor's degree in computer science, engineering, mathematics, business. Three (3) years of applicable experience may be substituted for a degree.

Title: 2. Senior Principal Information Engineer

Minimum/General Experience: Fourteen years IT systems experience, with ten of the fourteen using structured analytical and programming techniques at the systems level, as well as developing and implementing advanced techniques and procedures. Sought as a recognized expert in requirements definition, conceptualizing system design, evaluating alternatives, and selecting final solutions. Expert in the use and development of integrated CASE Tools for requirements analysis and system design. At least five years managing and directing the efforts of other analysts. Recognized nationally as an expert in the field.

Functional Responsibility: Defines, designs, and specifies processes and procedures for developing complex information systems. Chief Designer during the system development life cycle. Defines the documentation requirements.

Minimum Education: Bachelor's degree in computer science, related technical field. Advanced degree is desirable, as is being recognized in the field as an expert. Three (3) years of applicable experience may be substituted for a degree.

Title: 2a. Principal Information Engineer

Minimum/General Experience: Twelve years IT systems experience, with eight of the twelve using structured analytical and programming techniques at the systems level. Highly experienced at defining requirements, conceptualizing system design, evaluating alternatives, and presenting recommendations. Expert in the use and development of integrated CASE Tools for requirements analysis and system design. At least three years directing the efforts of other analysts.

Functional Responsibility: Defines, designs, and specifies processes and procedures for developing complex information systems. Team Leader during the requirements analysis and system design phase of the system development life cycle. Performs the final approval review of documentation created to support the analysis and design activities.

Minimum Education: Bachelor's degree in computer science, related technical field. Advanced degree is desirable, as is being recognized in the field as an expert. Three (3) years of applicable experience may be substituted for a degree.

Title: 2b. Sr. Information Engineer

Minimum/General Experience: Eight (8) years experience in information systems development, functional and data requirements analysis, systems analysis and design, programming, program design, and documentation preparation

Functional Responsibility: Apply disciplines to reengineer methodologies/- principles. Develop analytical and computational techniques and methodology for problem solutions. Perform strategic systems planning, business information planning, business, and analysis. Perform process and data modeling.

Minimum Education: Bachelor's degree in computer science, related technical field. Three (3) years of applicable experience may be substituted for a degree.

Title: 2c. Information Engineer

Minimum/General Experience: Five (5) years experience in information systems development, functional and data requirements analysis, systems analysis and design, programming, program design, and documentation preparation

Functional Responsibility: Assist in applying disciplines to reengineer methodologies/principles. Assist in developing analytical and computational techniques and methodology for problem solutions. Perform basic strategic systems planning, business information planning, business, and analysis. Perform non-complex process and data modeling.

Minimum Education: Bachelor's degree in computer science, related technical field. Three (3) years of applicable experience may be substituted for a degree.

Title: 3. Senior Principal Engineer

Minimum/General Experience: Fourteen years experience in the engineering and development of complex solutions to system problems. Recognized nationally as an expert in the field.

Functional Responsibility: Applies systems analysis and engineering techniques and procedures to developing complex information systems on multiple platforms and development environments. Combines software, hardware, standards and engineering in the development of system architectures.

Minimum Education: Master's degree in computer science, engineering, or related field. Doctorate degree is desired. Three (3) years of applicable experience may be substituted for a degree.

Title: 4. Principal Analyst

Minimum/General Experience: Seven years experience in a field related to the project.

Functional Responsibility: Serves as the lead subject matter expert to provide technical expertise, implementation review, editing and coordination of projects that include, but are not limited to, technology analysis, strategic technology planning, policy research and analysis, technical training support, and automated, electronic or hard copy information product development.

Minimum Education: Bachelor's degree in computer science or related field. Three (3) years of applicable experience may be substituted for a degree.

Title: 5. Subject Matter Expert I

Minimum/General Experience: Ten years of progressively responsible experience involving information technology and related systems and often unique specialization. Recognized as an industry or specialty expert especially in the use of information processing, telecommunications, or security systems, through exposure such as publications, research, teaching, and speeches.

Functional Responsibility: Expert consulting in highly specialized, leading edge information technologies and methodologies. Provides highly technical specialized guidance with regard to automated solutions to complex information processing problems. Often called upon as one of a few nationally recognized specialists with unique knowledge and skills.

Minimum Education: Advanced degree in specialty area, information technology, computer science, operations research, electrical engineering, industrial hygiene, or mathematics, or equivalent experience. Four (4) years of applicable experience may be substituted for a degree.

Title: 5a. Subject Matter Expert II

Minimum/General Experience: Twelve years of progressively responsible experience involving information technology and related systems and often unique specialization. Recognized as an industry or specialty expert especially in the use of information processing, telecommunications, or security systems, through exposure such as publications, research, teaching, and speeches.

Functional Responsibility: Expert consulting in highly specialized, leading edge solutions involving information technologies and methodologies. Provides highly technical specialized guidance with regard to automated solutions to complex information processing problems. Often called upon as one of a few nationally recognized specialists with unique knowledge and skills.

Minimum Education: Advanced degree in specialty area, information technology, computer science, operations research, electrical engineering, or mathematics. Four (4) years of applicable experience may be substituted for a degree.

Title: 6. Sr. Program Analyst

Minimum/General Experience: Nine (9) years experience in a field related to the project. Advanced knowledge of specific discipline. Ability to develop solutions to complex problems.

Functional Responsibility: Initiates studies and determine techniques or methods to accomplish objectives. Develops recommendations and reports. Schedules and executes project plans.

Minimum Education: Bachelor's degree in computer science or related field. Three (3) years of applicable experience may be substituted for a degree.

Title: 6a. Program Analyst

Minimum/General Experience: Six (6) years experience in a field related to the project. Broad knowledge of specific discipline. Ability to provide input to develop solutions to complex problems.

Functional Responsibility: Generates, manipulates, and analyzes programmatic information and data. Provides input to develop recommendations and reports. Executes project plans under direction.

Minimum Education: Bachelor's degree in computer science or related field. Three (3) years of applicable experience may be substituted for a degree.

Title: 7. Sr. Consultant

Minimum/General Experience: Six (6) years experience in applying technical and management systems methods to define and develop solutions to problems and issues.

Functional Responsibility: Responsible for the execution of project tasks under the direction of a higher level Consultant or a Manager. Applies technical and management systems methods to define and develop solutions to problems and issues.

Minimum Education: Bachelor's degree in related field. Three (3) years of applicable experience may be substituted for a degree.

Title: 7a. Consultant

Minimum/General Experience: Three (3) years experience in applying technical and management systems methods to define and develop solutions to problems and issues.

Functional Responsibility: Supports the execution of project tasks under the direction of a higher level Consultant or a Manager. Applies technical and management systems methods to define and develop solutions to problems and issues.

Minimum Education: Bachelor's degree in related field. Three (3) years of applicable experience may be substituted for a degree.

Title: 7b. Jr. Consultant

Minimum/General Experience: Zero to two (2) years experience in applying technical and management systems methods to define and develop solutions to problems and issues.

Functional Responsibility: Supports the execution of project tasks under the direction of a higher level Consultant or a Manager. Applies technical and management systems methods to define and develop solutions to problems and issues.

Minimum Education: High School diploma with some post-secondary coursework.

Title: 8. Sr. Technical Security Specialist

Minimum/General Experience: Ten (10) years experience programming and testing application software using a variety of software languages. Demonstrated ability to develop detailed program designs and system test plans and to supervise the programmers and systems analysts in the programming and testing of information systems. Demonstrated ability to formulate specifications for computer programmers to use in coding, testing, and debugging of computer programs. Proven ability to work independently or under only general direction on complex application problems involving all phases of systems analysis is required. At least five (5) years must be specialized experience providing computer security requirements for high level applications, evaluating approved security product capabilities, or developing security lifecycle process solutions. Knowledgeable of applicable security development standards & security regulatory compliance.

Functional Responsibility: Provides security technical and administrative direction for personnel performing software development tasks, including the review of work products for correctness, adherence to the design concept and to user standards, and for progress in accordance with schedules. Coordinates with the Project and/or Program Manager to ensure problem solution and user satisfaction. Makes recommendations, if needed, for approval of major systems installations. Prepares milestone status reports and deliveries/presentations on the system concept to colleagues, subordinates, and end user representatives. Provides daily supervision and direction to support staff.

Minimum Education: Bachelor's degree in computer science or related field. Three (3) years of applicable experience may be substituted for a degree.

Title: 8a. Technical Security Specialist

Minimum/General Experience: Seven (7) years experience programming and testing application software using a variety of software languages. Demonstrated ability to develop detailed program designs and system test plans and to supervise the programmers and systems analysts in the programming and testing of information systems. Demonstrated ability to formulate specifications for computer programmers to use in coding, testing, and debugging of computer programs. Proven ability to work independently or under only general direction on complex application problems involving all phases of systems analysis is required. At least two (2) years must be specialized experience providing computer security requirements for high level applications, evaluating approved security product capabilities, or developing security lifecycle process solutions. Knowledgeable of applicable security development standards & security regulatory compliance.

Functional Responsibility: Provides security technical and administrative direction for personnel performing software development tasks, including the review of work products for correctness, adherence to the design concept and to user standards, and for progress in accordance with schedules. Coordinates with the Project and/or Program Manager to ensure problem solution and user satisfaction. Makes recommendations, if needed, for approval of major systems installations. Prepares milestone status reports and deliveries/presentations on the system concept to colleagues, subordinates, and end user representatives. Provides daily supervision and direction to support staff.

Minimum Education: Bachelor's degree in computer science or related field. Three (3) years of applicable experience may be substituted for a degree.

Title: 9. Senior Industry/Functional Area Specialist

Minimum/General Experience: Ten (10) years experience in related field. Eight (8) years of demonstrated specialized experience in the functional area of required tasks. Recognized amongst peers for understanding and communicating common best practices for the industry. Has domain and expert technical knowledge of functional areas and programmatic knowledge practice-wide. Provides work direction and guidance to other personnel; ensures accuracy of the work of other personnel, operates under deadlines, able to work on multiple tasks.

Functional Responsibility: Utilize a knowledge base to create conceptual business models and to point out relevant issues and considerations in mission/business alignment. Assess the operational and functional baseline of an organization and its organizational components, and help to define the direction and strategy for an engagement while ensuring the organizational needs are being addressed. Examples of the functional areas would include Human Resources, Finance, Supply, Health Service, etc. Work with senior managers to provide industry vision and guidance with regard to their industry. Lead the determination and classification of information inadequacies and/or deficiencies that affect the functional area's ability to support/meet organizational goals. Support the development of functional area strategies for enhanced operations in a cross-functional area mode throughout the organization. Applies management analysis processes, statistical methods, and advanced technical and analytical research techniques to determine solutions based on client requirements.

Minimum Education: Bachelor's degree in a related field. Three years of applicable experience may be substituted for degree.

Title: 9a. Principal Industry/Functional Area Specialist

Minimum/General Experience: Twelve (12) years experience in related field. Ten (10) years of demonstrated specialized experience in the functional area of required tasks. Recognized amongst peers for strong expertise in industry issues and trends. Has domain and expert technical knowledge of functional areas and programmatic knowledge practice-wide. Manages, controls, and directs the activities of multiple functional areas through program and project/task managers with overall responsibility for the implementation of project phases. Responsible for decision making that has long-term impact on meeting major project performance objectives. Provides guidance and direction to other professionals, acts in a consulting and/or advisory capacity; coordinates resolution of highly complex problems and tasks, possesses ability to meet and operate under deadlines.

Functional Responsibility: Utilize functional area expertise gained through direct industry experience to assess the operational and functional baseline of an organization and its organizational components. Examples of the functional areas would include Human Resources, Finance, Supply, Health Service, etc. Work with senior managers and executives to provide industry vision and strategic direction with regard to their enterprise. Guide the

determination of information inadequacies and/or deficiencies that affect the functional area's ability to support/meet organizational goals. Generate functional area strategies for enhanced operations in a cross-functional area mode throughout the organization. Participate in account strategy sessions, strategic assessments and design reviews to validate enterprise approach and associated work products.

Minimum Education: Master's degree in a related field. Three years of applicable experience may be substituted for degree.

Services Price List

(Hourly Firm Fixed Prices)

for

Information Technology (IT) Professional Services

(Special Item Number 132-51)

| Category No. | Labor Category | Rates Year 1 | Year 2 Rates | Year 3 Rates | Year 4 Rates | Year 5 Rates |
|--------------|---------------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|
| | | 05/30/2011 through 05/29/2012 | 05/30/2012 through 05/29/2013 | 05/30/2013 through 05/29/2014 | 05/30/2014 through 05/29/2015 | 05/30/2015 through 05/29/2016 |
| 1. | Program Manager I | \$111.01 | \$113.90 | \$116.86 | \$119.90 | \$123.02 |
| 1a. | Program Manager II | \$123.79 | \$127.00 | \$130.31 | \$133.69 | \$137.17 |
| 2. | Senior Principal Information Engineer | \$136.46 | \$140.01 | \$143.65 | \$147.38 | \$151.21 |
| 2a. | Principal Information Engineer | \$103.65 | \$106.34 | \$109.11 | \$111.95 | \$114.86 |
| 2b. | Sr. Information Engineer | \$92.54 | \$94.94 | \$97.41 | \$99.94 | \$102.54 |
| 2c. | Information Engineer | \$88.54 | \$90.84 | \$93.20 | \$95.63 | \$98.11 |
| 3. | Senior Principal Engineer | \$119.97 | \$123.09 | \$126.29 | \$129.58 | \$132.95 |
| 4. | Principal Analyst | \$99.37 | \$101.95 | \$104.60 | \$107.32 | \$110.11 |
| 5. | Subject Matter Expert I | \$150.17 | \$154.07 | \$158.08 | \$162.19 | \$166.41 |
| 5a. | Subject Matter Expert II | \$184.50 | \$189.30 | \$194.22 | \$199.27 | \$204.45 |
| 6. | Sr. Program Analyst | \$107.77 | \$110.57 | \$113.45 | \$116.40 | \$119.42 |
| 6a. | Program Analyst | \$97.18 | \$99.71 | \$102.30 | \$104.96 | \$107.69 |
| 7. | Sr. Consultant | \$84.71 | \$86.91 | \$89.17 | \$91.49 | \$93.87 |
| 7a. | Consultant | \$77.01 | \$79.02 | \$81.07 | \$83.18 | \$85.34 |

| Category No. | Labor Category | Rates Year 1 | Year 2 Rates | Year 3 Rates | Year 4 Rates | Year 5 Rates |
|--------------|--|-------------------------------|-------------------------------|-------------------------------|-------------------------------|-------------------------------|
| | | 05/30/2011 through 05/29/2012 | 05/30/2012 through 05/29/2013 | 05/30/2013 through 05/29/2014 | 05/30/2014 through 05/29/2015 | 05/30/2015 through 05/29/2016 |
| 7b. | Jr. Consultant | \$59.94 | \$61.50 | \$63.10 | \$64.74 | \$66.42 |
| 8. | Sr. Technical Security Specialist | \$175.73 | \$180.30 | \$184.99 | \$189.80 | \$194.73 |
| 8a. | Technical Security Specialist | \$165.46 | \$169.76 | \$174.17 | \$178.70 | \$183.35 |
| 9. | Senior Industry/ Functional Area Specialist | \$240.95 | \$247.21 | \$253.64 | \$260.23 | \$267.00 |
| 9a. | Principal Industry/ Functional Area Specialist | \$267.72 | \$274.68 | \$281.82 | \$289.15 | \$296.67 |

Notes

1. Travel costs will be additional to the labor rates, as authorized in the order.
2. Labor rates include the .75% Industrial Funding Fee that PMC will pay to GSA FSS.

**USA COMMITMENT TO PROMOTE
SMALL BUSINESS PARTICIPATION
PROCUREMENT PROGRAMS**

PREAMBLE

Portfolio Management Consulting, LLC provides commercial products and services to ordering activities. We are committed to promoting participation of small, small disadvantaged and women-owned small businesses in our contracts. We pledge to provide opportunities to the small business community through reselling opportunities, mentor-protégé programs, joint ventures, teaming arrangements, and subcontracting.

COMMITMENT

To actively seek and partner with small businesses.

To identify, qualify, mentor and develop small, small disadvantaged and women-owned small businesses by purchasing from these businesses whenever practical.

To develop and promote company policy initiatives that demonstrate our support for awarding contracts and subcontracts to small business concerns.

To undertake significant efforts to determine the potential of small, small disadvantaged and women-owned small business to supply products and services to our company.

To insure procurement opportunities are designed to permit the maximum possible participation of small, small disadvantaged, and women-owned small businesses.

To attend business opportunity workshops, minority business enterprise seminars, trade fairs, procurement conferences, etc., to identify and increase small businesses with whom to partner.

To publicize in our marketing publications our interest in meeting small businesses that may be interested in subcontracting opportunities.

We signify our commitment to work in partnership with small, small disadvantaged and women-owned small businesses to promote and increase their participation in ordering activity contracts. To accelerate potential opportunities please contact:

Mr. John Pedder (301)512-5366 voice jpедder@pmcllc.us (703)997-4526 fax

**BEST VALUE
BLANKET PURCHASE AGREEMENT
FEDERAL SUPPLY SCHEDULE**

(Insert Customer Name)

In the spirit of the Federal Acquisition Streamlining Act (ordering activity) and Portfolio Management Consulting, LLC enter into a cooperative agreement to further reduce the administrative costs of acquiring commercial items from the General Services Administration (GSA) Federal Supply Schedule Contract(s) _____.

Federal Supply Schedule contract BPAs eliminate contracting and open market costs such as: search for sources; the development of technical documents, solicitations and the evaluation of offers. Teaming Arrangements are permitted with Federal Supply Schedule Contractors in accordance with Federal Acquisition Regulation (FAR) 9.6.

This BPA will further decrease costs, reduce paperwork, and save time by eliminating the need for repetitive, individual purchases from the schedule contract. The end result is to create a purchasing mechanism for the ordering activity that works better and costs less.

Signatures

| Ordering Activity | Date | Contractor | Date |
|--------------------------|-------------|-------------------|-------------|
| | | | |

BPA NUMBER _____

(CUSTOMER NAME)
BLANKET PURCHASE AGREEMENT

Pursuant to GSA Federal Supply Schedule Contract Number(s) _____, Blanket Purchase Agreements, the Contractor agrees to the following terms of a Blanket Purchase Agreement (BPA) EXCLUSIVELY WITH (ordering activity):

- (1) The following contract items can be ordered under this BPA. All orders placed against this BPA are subject to the terms and conditions of the contract, except as noted below:

| MODEL NUMBER/PART NUMBER | *SPECIAL BPA DISCOUNT/PRICE |
|--------------------------|-----------------------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

- (2) Delivery:

| DESTINATION | DELIVERY SCHEDULES / DATES |
|-------------|----------------------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

- (3) The ordering activity estimates, but does not guarantee, that the volume of purchases through this agreement will be _____
- (4) This BPA does not obligate any funds.
- (5) This BPA expires on _____ or at the end of the contract period, whichever is earlier.
- (6) The following office(s) is hereby authorized to place orders under this BPA:

| OFFICE | POINT OF CONTACT |
|--------|------------------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

- (7) Orders will be placed against this BPA via Electronic Data Interchange (EDI), FAX, or paper.
- (8) Unless otherwise agreed to, all deliveries under this BPA must be accompanied by delivery tickets or sales slips that must contain the following information as a minimum:
 - (a) Name of Contractor;
 - (b) Contract Number;
 - (c) BPA Number;
 - (d) Model Number or National Stock Number (NSN);
 - (e) Purchase Order Number;
 - (f) Date of Purchase;
 - (g) Quantity, Unit Price, and Extension of Each Item (unit prices and extensions need not be shown when incompatible with the use of automated systems; provided, that the invoice is itemized to show the information); and
 - (h) Date of Shipment.

- (9) The requirements of a proper invoice are specified in the Federal Supply Schedule contract. Invoices will be submitted to the address specified within the purchase order transmission issued against this BPA.
- (10) The terms and conditions included in this BPA apply to all purchases made pursuant to it. In the event of an inconsistency between the provisions of this BPA and the Contractor's invoice, the provisions of this BPA will take precedence.

**BASIC GUIDELINES FOR USING
“CONTRACTOR TEAM ARRANGEMENTS”**

Federal Supply Schedule Contractors may use “Contractor Team Arrangements” (see FAR 9.6) to provide solutions when responding to a ordering activity requirements.

These Team Arrangements can be included under a Blanket Purchase Agreement (BPA). BPAs are permitted under all Federal Supply Schedule contracts.

Orders under a Team Arrangement are subject to terms and conditions or the Federal Supply Schedule Contract.

Participation in a Team Arrangement is limited to Federal Supply Schedule Contractors.

Customers should refer to FAR 9.6 for specific details on Team Arrangements.

Here is a general outline on how it works:

- The customer identifies their requirements.
- Federal Supply Schedule Contractors may individually meet the customers needs, or -
- Federal Supply Schedule Contractors may individually submit a Schedules “Team Solution” to meet the customer’s requirement.
- Customers make a best value selection.