

# PbSi

Performance-based Solutions, Inc.

...just task us

## **GENERAL SERVICES ADMINISTRATION**

### **Federal Acquisition Service**

*Authorized Federal Supply Schedule Price List*

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through **GSA Advantage!**<sup>™</sup>, a menu-driven database system. The INTERNET address for **GSA Advantage!**<sup>™</sup> is: <http://www.GSAAdvantage.gov>.

### **Schedule for - Consolidated**

**Federal Supply Group: CORP**

**Contract Number: GS-00F-034CA**

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

**Contract Period:** - February 4, 2015 through February 3, 2020

**Contractor:** Performance-based Solutions, Inc.  
1555 King Street, Suite 201  
Alexandria, VA 22314 2738

**Business Size:** Small, Disadvantaged, Woman Owned Business

**Telephone:** (703) 575/6464  
**Fax Number:** (703) 575-6467  
**Web Site:** [www.taskpbsi.com](http://www.taskpbsi.com)  
**Contract Administrator:** Collette M. Dawud  
**E-mail:** celey@taskpbsi.com

**Effective October 1, 2015, the Consolidated Schedule will become the Professional Services Schedule (PSS), with no changes to any terms and conditions found within this document". Should any changes be made to the existing terms and conditions via the issuance of a contract modification, a new file will need to be uploaded as required by clause 552.238-81 MODIFICATIONS (FEDERAL SUPPLY SCHEDULE) (APR 2014) (ALTERNATE I – APR 2014)."**

## CUSTOMER INFORMATION

**1a. Table of Awarded Special Item Number(s) with appropriate cross-reference to page numbers:**

SIN	Recovery	SIN Description
C541-1000	C541-1000RC	Other Direct Costs (ODCs) are expenses other than labor hours (Small Business Set-Aside)
C541-4D	C541-4DRC	Conference, Events and Tradeshow Planning Services
C874-1	C874-1RC	Integrated Consulting Services
C874-4	C874-4RC	Training Services: Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration, Learning Management, Internships per MOBIS Refresh 20

**1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract. This price is the Government price based on a unit of one, exclusive of any quantity/dollar volume, prompt payment, or any other concession affecting price. Those contracts that have unit prices based on the geographic location of the customer, should show the range of the lowest price, and cite the areas to which the prices apply.**

**1c. If the Contractor is proposing hourly rates a description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform services shall be provided. If hourly rates are not applicable, indicate "Not applicable" for this item.**

**2. Maximum Order:** \$1,000,000.00

**3. Minimum Order:** \$100.00

**4. Geographic Coverage (delivery Area):** Domestic Only

**5. Point(s) of production (city, county, and state or foreign country):** Same as company address

**6. Discount from list prices or statement of net price:** Government net prices (discounts already deducted). See Attachment.

**7. Quantity discounts:** None Offered

**8. Prompt payment terms:** Net 30 days

**9a. Notification that Government purchase cards are accepted up to the micro-purchase threshold:** Yes

**9b. Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold:** will not accept over \$2,500

**10. Foreign items (list items by country of origin):** None

**11a. Time of Delivery (Contractor insert number of days):** Specified on the Task Order

**11b. Expedited Delivery. The Contractor will insert the sentence "Items available for expedited delivery are noted in this price list." under this heading. The Contractor may use a symbol of its choosing to highlight items in its price list that have expedited delivery:** Contact Contractor

**11c. Overnight and 2-day delivery. The Contractor will indicate whether overnight and 2-day delivery are available. Also, the Contractor will indicate that the schedule customer may contact the Contractor for rates for overnight and 2-day delivery:** Contact Contractor

- 11d. Urgent Requirements.** The Contractor will note in its price list the “Urgent Requirements” clause of its contract and advise agencies that they can also contact the Contractor’s representative to effect a faster delivery: Contact Contractor
- 12. F.O.B Points(s):** Destination
- 13a. Ordering Address (es):** Same as Contractor
- 13b. Ordering procedures:** For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA’s), and a sample BPA can be found at the GSA/FSS Schedule homepage ([fss.gsa.gov/schedules](http://fss.gsa.gov/schedules)).
- 14. Payment Address (es):** Same as company address
- 15. Warranty provision:** Contractor’s standard commercial warranty.
- 16. Export Packing Charges (if applicable):** N/A
- 17. Terms and conditions of Government purchase card acceptance (any thresholds above the micro-purchase level):** Contact Contractor
- 18. Terms and conditions of rental, maintenance, and repair (if applicable):** N/A
- 19. Terms and conditions of installation (if applicable):** N/A
- 20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable):** N/A
- 20a. Terms and conditions for any other services (if applicable):** N/A
- 21. List of service and distribution points (if applicable):** N/A
- 22. List of participating dealers (if applicable):** N/A
- 23. Preventive maintenance (if applicable):** N/A
- 24a. Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants:** N/A
- 24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contractor’s website or other location.) The EIT standards can be found at:** [www.Section508.gov/](http://www.Section508.gov/).
- 25. Data Universal Numbering System (DUNS) number:** 119621626
- 26. Notification regarding registration in Central Contractor Registration (CCR) database:** Registered
- 27. Final Pricing:** The rates shown below include the Industrial Funding Fee (IFF) of 0.75%.

## **ABOUT PERFORMANCE-BASED SOLUTIONS, INC. (PBSI)**

Performance-based Solutions, Inc. (PbSi) provides management consulting, business integration and information technology solutions to assist public and private sector customers to develop and implement strategies to meet evolving statutory, regulatory, policy and procedural requirements. These services include project management, process and productivity improvement, customer service enhancement, event management including logistics support, benchmarking and surveying, training and developing annual operating plans.

PbSi provides expert advice, assistance, guidance, facilitation and decision support services. PbSi has successfully assisted clients to respond to organizational mandates, improve mission performance within changing environments and to manage change. PbSi possesses high quality performance and technical capabilities required to: offer value-added methodologies; deliver prioritized plans; complete requirements definition and process documentation requirements; deliver process improvement strategies and facilitate stakeholder acceptance.

Within human resources management organizations, PbSi conducts performance evaluations and designs competency-based approaches for identifying workforce training needs and developing performance management plans. Also, PbSi designs classroom training, self-study training modules, and computer-based training for technical professionals; and inventories knowledge, skills, and abilities to align training needs with position descriptions and performance expectations. PbSi is well-equipped to ensure that these activities are effectively integrated with training and facilitation strategies designed to institutionalize these processes and quality assurance activities that facilitate proper oversight.

Additionally, PbSi places significant emphasis on establishing performance measures to evaluate the success and effectiveness of overall efforts; and on identifying and providing recommendations for mitigating, managing and eliminating risks.

**Awarded Labor Categories**

Item	SIN	Awarded Labor Category	Min Edu	Min Exp	Site	Year 1
1	C541-4D/RC	Conference Manager	Bachelors	10	Both	\$78.35
2	C541-4D/RC	Conference Coordinator	Bachelors	5	Both	\$69.59
3	C541-4D/RC	Online Registration Tech	Bachelors	5	Both	\$76.84
4	C541-4D/RC	Meeting Planner	Bachelors	4	Both	\$57.98
5	874-1/RC	Program Manager V (Existing)	Masters	15	Customer	\$139.05
6	874-1/RC	Project Manager I (Existing)	Bachelors	5	Customer	\$48.14
7	874-1/RC	Consultant II (Existing)	Masters	8	Customer	\$58.26
8	874-1/RC	Consultant III (Existing)	Masters	10	Customer	\$72.82
9	874-1/RC	Consultant V (Existing)	Ph.D.	15	Customer	\$139.05
10	874-1/RC	Analyst I (Existing)	Bachelors	3	Customer	\$35.02
11	874-1/RC	Analyst III (Existing)	Masters	10	Customer	\$65.10
12	874-1/RC	Program Analyst II (Existing)	Masters	5	Customer	\$62.42
13	874-1/RC	Subject Matter Specialist III (Existing)	Masters	10	Customer	\$89.30
14	874-4/RC	Trainer II (New)	Masters	10	Customer	\$127.93
15	874-4/RC	Program Manager V (Existing)	Masters	15	Customer	\$139.05
16	874-4/RC	Project Manager I (Existing)	Bachelors	5	Customer	\$48.14
17	874-4/RC	Subject Matter Specialist III (Existing)	Masters	10	Customer	\$89.30
18	874-4/RC	Consultant II (Existing)	Masters	8	Customer	\$58.26
19	874-4/RC	Consultant III (Existing)	Masters	10	Customer	\$72.82
20	874-4/RC	Consultant V (Existing)	Ph.D.	15	Customer	\$139.05

## Labor Category Descriptions

Labor Category	Minimum General Experience	Minimum Education	Description/Scope of Responsibilities
Program Manager V	Recognized as a leader in the field. Has exercised authority and responsibility for day-to-day management of supervisory personnel; complex multi-disciplined programs, including technical and administrative oversight of subordinate supervisors, team leaders and staff, tasks and internal and external resources.	Master's degree with 15 years of general experience to include 10 years of specialized experience. Additional experience may be substituted for education, and specialized experience in access of ten years may sufficiently substitute for general experience at the discretion of the Government.	Responsible for supervising high-level professional and subordinate supervisors tasked with large or multiple complex tasks related to mission-oriented business integration projects. Directs the work of larger teams tasked with ongoing programmatic responsibilities as well as possibly directing the work of individual Project Managers. Ensures the accuracy and timeliness of deliverables, including status reports for a single larger ongoing program or multiple projects or tasks. This person may also directly provide expert advice and assistance.
Consultant V	Recognized as a leader in the field. Has exercised independent authority and responsibility for day-to-day management of project staffs, including technical and administrative oversight and resources. Has independently developed policy guidance, and made high-level recommendations for policy implementation. Has demonstrated experience developing and applying highly advanced principles, concepts and techniques.	Ph. D with 15 years of general experience to include 10 years of specialized experience. Additional experience in access of 15 years may be substituted for education, and specialized experience in access of 10 years may sufficiently substitute for general experience at the discretion of the Government. Additional consideration will be given to demonstrated specific/relevant experience.	May serve as the project manager or senior technical lead on complex tasks requiring specific technical leadership. Provides the highest level of independent consultation, executive guidance, and independent technical direction and implementation planning in support of client business improvement initiatives. Develops and applies highly advanced principles, concepts and techniques appropriate to providing senior leadership, analysis, guidance or insight into the scientific or technical discipline under evaluation. May plan, conduct or supervise contracts or complex projects of major significance, requiring technical expertise or the ability to develop and apply methods and procedures. May perform advanced analyses of policies and strategies; conduct process or activity flow, analysis or design; operations research; simulation and data modeling using automated tools; developing and providing training materials; or related skills.
Consultant III	Recognized among peers in the field. Has exercised authority and responsibility for leadership of project staffs, including technical and administrative oversight and resources. Has developed, individually or as a member of teams, policy guidance, and made high-level recommendations for policy implementation. Has demonstrated experience developing and applying highly advanced principles, concepts and techniques.	Master's degree with 10 years general experience to include 7 years specialized experience. Additional experience may be substituted for education, and specialized experience in access of seven years may sufficiently substitute for general experience at the discretion of the Government.	Provides expert, independent services and research on an as-required basis to mission-oriented business integration projects. Ensures proper definition of the issues and assists in developing and monitoring business/project plan, to ensure success, through coordinated contacts with the client. Applies broad, complete, understanding of principles, concepts and techniques appropriate to serving as a scientific or technical resource providing analysis, guidance, and insight into the scientific or technical discipline under evaluation; performs analyses of policies and strategies; also may conduct process or activity flow, analysis or design; operations research; simulation and data modeling using automated tools; developing and providing training materials; and related skills gained through extensive study and experience.

<b>Labor Category</b>	<b>Minimum General Experience</b>	<b>Minimum Education</b>	<b>Description/Scope of Responsibilities</b>
Consultant II	Has demonstrated ability to exercise authority and responsibility on project teams, including technical and administrative oversight and resources. Has developed, individually or as a member of teams, policy guidance, and made high-level recommendations for policy implementation. Has demonstrated experience developing and applying principles, concepts and techniques in area of concentration.	Master's Degree with 8 years of general experience to include 5 years of specialized experience. Additional experience may be substituted for education, and specialized experience in access of five years may sufficiently substitute for general experience at the discretion of the Government.	Applies broad, complete, understanding of principles, concepts and techniques appropriate to serving as a scientific or technical resource providing analysis, guidance, and insight into to mission-oriented business integration projects; performs analyses of policies and strategies; also may conduct process or activity flow, analysis or design; operations research; simulation and data modeling using automated tools; developing and providing training materials; and related skills gained through extensive study and experience. Also may lead the development of outreach strategies and the design and production of communications materials. Demonstrates the skill and ability to perform complex professional tasks and develop innovative solutions.
Subject Matter Expert III	Recognized among peers as an expert with advanced knowledge in a specialized scientific, engineering or technical area. Has exercised authority and responsibility for leadership of technical project teams or technical components of deliverables developed by teams. Has developed, individually or as a member of teams, policy guidance, and made high-level recommendations for policy implementation.	Master's Degree with 10 years' experience to include 7 years of specialized experience. Additional experience may be substituted for education, and specialized experience in access of seven years may sufficiently substitute for general experience at the discretion of the Government.	Provides subject matter expertise, executive guidance, and technical direction and implementation planning, in support of client business initiatives such as scientific and engineering applications, social science, financial data, compliance issues, regulatory affairs, review and improvement of agency planning and budgetary processes, grant management processes, application modeling, and strategic and tactical enterprise support. Possesses experience in business process facilitation, reengineering, training, methodology development, best practice modeling, and organizational development through information systems.
Project Manager I	Has exercised authority and responsibility for day-to-day supervision, including technical and administrative oversight of staff, tasks and resources. Has made high-level recommendations for policy implementation. Has assigned, reviewed and ensured the quality of work performed by subordinates. Has demonstrated leadership in project support in a government or commercial contracting environment.	Bachelor's Degree with 5 years of senior technical leadership or supervisory experience to include 3 years of specialized experience. Additional consideration will be given to demonstrated specific/relevant customer specific experience.	Responsible for handling the day-to-day management and administration of project tasks, developing detailed work plans and scheduling in response to customer requirements and requests, assigning staff responsibilities and supervising staff efforts. Utilizes, maintains control over, and redirects available resources as necessary to complete tasks in accordance with scheduled milestones and budgetary constraints to mission-oriented business integration projects. Performs quality checks of all work products, and is responsible for formulating and enforcing work standards. Interacts continuously with government technical representatives to present interim results, discuss concerns, and ensure total product/service satisfaction.

<b>Labor Category</b>	<b>Minimum General Experience</b>	<b>Minimum Education</b>	<b>Description/Scope of Responsibilities</b>
Program Analyst II	<p>Complete to in-depth knowledge of principles, concepts and techniques appropriate to program management and analysis, planning, scheduling, logistics, and data analysis.</p> <p>Demonstrates the skill and ability to perform complex tasks and develop innovative solutions. Able to communicate effectively and clearly present recommendations, technical approaches and findings.</p>	<p>Master's Degree with 5 years of general experience to include 3 years of specialized experience in program management or analysis. Additional experience may be substituted for education, and specialized experience in access of 3 years may sufficiently substitute for general experience at the discretion of the Government.</p>	<p>Within defined objectives, but with considerable latitude, performs in a professional position requiring an in-depth knowledge and capability to perform independent, complex analysis, concept formulation, and new method identification.</p> <p>Interacts with project staff and clients. This individual must be capable of providing analysis, planning, requirements definition, evaluation of alternatives in technical approaches and associated cost analyses for creating or upgrading system performance. Performs and assists in the performance of risk identification, analysis and mitigation; computations of ROI; value engineering and management; and cost-benefit analysis associated with mission-oriented business integration projects.</p>
Analyst III	<p>Has exercised authority and responsibility for day-to-day technical oversight of staff, tasks or resources. Has developed policy guidance, and made high-level recommendations for policy or procedural implementation.</p> <p>Has comprehensive knowledge of principles, concepts and techniques related to planning, scheduling, research, logistics, and data analysis</p>	<p>Master's Degree with 10 years of general experience to include 7 years of specialized experience. Additional experience may be substituted for education, and specialized experience in access of 7 years may sufficiently substitute for general experience at the discretion of the Government.</p>	<p>May provide direction to lower level Analysts and may serve as Team Leader on appropriate tasks. May independently perform tasks assigned by a customer or, on larger more complex assignments, may serve as a mid-level front-line support professional to higher level Subject Matter Experts, Senior Consultants and/or managers. Are essential to mission-oriented business improvement tasks, performing vital professional support and team leader functions related to information gathering, data collections, facilitation, oversight of meeting coordination staff, mid-level analysis, and report editing and generation. Maintains routine interactions with senior staff. May assign, review and ensure the quality of work performed by subordinates.</p>
Analyst I	<p>Has exercised broad, often complete, understanding of principles, concepts and techniques appropriate to providing professional support, including first-level data collection and analysis, planning, scheduling logistics, and program analysis.</p> <p>Demonstrates the skill and ability to perform semi-complex professional tasks.</p>	<p>Bachelor's degree with 3 years of general experience to include 1 year of specialized experience. Specialized experience includes office management, suspense tracking, review and approval of executive correspondence, project status reports, submitting input for monthly reports, outreach, meeting coordination, writing/editing and program analysis.</p> <p>Proficient with Microsoft Office Suite with basic computer skills.</p>	<p>Within defined parameters, exercises authority and responsibility for day-to-day performance of professional tasks, including technical and administrative tasks. Has routine interactions with internal customer staff. Responsibilities include providing professional assistance in support of the work of Consultants, Subject Matter Experts and managers. Provides outreach, meeting coordination, policy support, program administration, contributing to project reports, writing/editing, and/or program analysis, etc.</p>



<b>Labor Category</b>	<b>Minimum General Experience</b>	<b>Minimum Education</b>	<b>Description/Scope of Responsibilities</b>
Trainer II	<p>Position requires a minimum of 10 years of experience</p> <ul style="list-style-type: none"> <li>-Experience in coordinating the presentations of three or more trainers.</li> <li>-Experience with presenting large and small group instruction and deliver successful meetings using (Microsoft PowerPoint or Web software).</li> <li>-Knowledge of Instructional Systems               <ul style="list-style-type: none"> <li>-Design and developing training materials to fit the goals and objectives of the training requirements.</li> <li>-Ability to establish instructional goals and objectives and ability to developing classes or courses that accomplish the goals and objectives.</li> <li>-Solid interpersonal communications and organizational skills.</li> </ul> </li> <li>-Good attention to detail and accuracy, as well as, an ability to make on-the-spot corrections under stressful conditions.</li> </ul> <p>Ability to address students questions in a fair complete manner</p>	<p>Requires a Master's Degree in Education, Instructional Systems Design or related management, professional or business field.</p>	<p>Coordinates the overall development and presentation of course materials.</p> <p>Reviews and adjusts the training materials developed by other trainers.</p> <p>Develops training materials to include lesson plans, course descriptions and student materials.</p> <p>Presents training classes so that students understand the objectives and can accomplish these objectives when they leave the classroom.</p> <p>Develops courses of instruction that ties together the individual lesson plans in a block of instruction.</p> <p>Must be able to establish connections and operate technical support equipment for webinars, remote conferences, and training.</p> <p>Must be able to create instructional training materials.</p>

<b>Labor Category</b>	<b>Minimum General Experience</b>	<b>Minimum Education</b>	<b>Description/Scope of Responsibilities</b>
Conference Manager	<p>Minimum 10 years' experience in meeting management. Experience in database management and working knowledge of computer software (Microsoft word, spreadsheets and PowerPoint). Previous experience in handling multiple meetings, convention services, tradeshow sales and management, registration services and in providing direction, review and oversight of support staff. Good telephone manner, e-mail and writing skills, contract negotiation and RFP evaluation necessary. Excellent interpersonal, communication and organizational skills, attention to detail and accuracy.</p>	<p>Requires a Bachelor's Degree. Conference Managers are working on the requirements for the Certified Meeting Professional (CMP) credential or have achieved this goal.</p>	<p>Handles clients meeting needs and provides meeting planning oversight and services to clients and subordinate staff members. Serves as a trusted advisor and partner to PBSI's clients.</p> <p>Principle Functions:</p> <ul style="list-style-type: none"> <li>• Staff and operational oversight</li> <li>• Provide oversight, recommendations and assistance in providing high quality service and expertise</li> <li>• Liaison with clients</li> <li>• Meeting planning and management services: including handling, but not limited to</li> <li>• Site selection</li> <li>• Contract negotiations</li> <li>• All aspects of meeting planning and trade shows including an excellent understanding of the registration process and the post-con reporting process</li> <li>• Multiple client conference call logistics and fulfillment</li> <li>• Work closely with various departments: IT, Finance/Accounting</li> <li>• Troubleshoot solutions for any meeting challenges</li> <li>• Make decisions significantly relating to client service</li> <li>• Exercises independent judgment with regard to serving the client</li> </ul> <p>Supervises Meeting Managers, Meeting coordinators and contractors</p>

<b>Labor Category</b>	<b>Minimum General Experience</b>	<b>Minimum Education</b>	<b>Description/Scope of Responsibilities</b>
Conference Coordinator	Experience in database management and working knowledge of computer software (Microsoft Word, Access, spreadsheets, Microsoft Outlook and Presentation Graphic) Excellent Interpersonal, communication and organizational skills Attention to detail and accuracy	Requires a Bachelor's Degree	<p>Provides meeting management for specific activities. Has the ability to multi-task, follow-up on assignments and complete assignments according to agreed upon timelines. Serves as a good teammate in working with PBSI staff and clients. Must have good telephone manners and e-mail writing skills to communicate with speakers, sponsors, exhibitors, and meeting attendees. Must have strong computer skills, particularly with spreadsheets, registration database and web site updates. Fulfills all meeting and exhibition administrative duties related to the support of PBSI clients including but not limited to:</p> <ul style="list-style-type: none"> <li>• Maintenance of all exhibit spreadsheets, following up on collecting descriptions, providing kits and being available for phone and e-mail questions</li> <li>• Maintenance of all sponsor spreadsheets, following up on collecting information and logos and being available for phone and e-mail questions</li> <li>• Maintenance of all speaker spreadsheets, following up on collecting hand-out information and a/v needs, arranging air travel, transfers and hotel accommodations and being available for phone and e-mail questions</li> <li>• Assist with onsite management of meetings and trade shows in Washington, DC and other cities primarily in the US</li> <li>• Perform site selection tasks in locating appropriate meeting sites</li> <li>• Fulfill all registration responsibilities including financial balancing.</li> <li>• Makes decisions significantly relating to service the client</li> <li>• Makes decision significantly relating to service the client</li> <li>• Exercises independent judgment with regard to serving the client</li> </ul> <p>Other duties as assigned</p>

<b>Labor Category</b>	<b>Minimum General Experience</b>	<b>Minimum Education</b>	<b>Description/Scope of Responsibilities</b>
<p>Online Registration Technician</p>	<p>Position requires minimum of 5 years' experience</p> <p>Experience with technology hardware and software used in producing and delivering successful meetings (Microsoft Word, Access, spreadsheets, online registration)</p> <p>Interpersonal, communication and organizational skills</p> <p>Attention to detail and accuracy as well as well-rounded knowledge of technology solutions</p>	<p>Requires a Bachelor's Degree plus additional technology training</p>	<p>Provides support of all automated meeting services to include registration, web-based capabilities, and database management. Has the ability to multi-task, follow-up on assignments and complete assignments according to agreed upon timelines. Serves as a good teammate in working with PBSI staff and clients. Must have good communication skills and e-mail writing skills to communicate with staff. Must have continuing education to keep abreast of the latest in meetings' technology solutions and efficiencies. Fulfills all technology duties related to the support of PBSI clients including, but limited to:</p> <ul style="list-style-type: none"> <li>• Maintenance of web site or web links to other sites</li> <li>• Able to respond to staff inquiries about aspects of technology applications</li> <li>• Prepare customized registration template for online and manual registration</li> <li>• Prepare template for frequent reports to clients about the progress of the planning</li> <li>• Prepare frequent registration reports to indicate the progress of the registration activities</li> <li>• Fulfill all registration responsibilities including financial balancing</li> <li>• Makes decision significantly relating to service the client</li> <li>• Exercises independent judgment with regard to serving the client</li> </ul> <p>Other duties as assigned</p>

Labor Category	Minimum General Experience	Minimum Education	Description/Scope of Responsibilities
Meeting Planner	<p>Minimum 4 years' experience in meeting management.</p> <p>Previous experience in handling multiple meetings, convention services, trade show sales and management and registration services.</p> <p>Experience in database management and working knowledge of computer software (Microsoft Word, Spreadsheets and Microsoft Outlook)</p> <p>Excellent interpersonal, communication and organizational skills</p> <p>Attention to detail and accuracy</p> <p>Supervises Meetings Coordinators</p>	Requires a Bachelor's Degree	<p>Handles client meeting needs. Serve as a trusted advisor and partner to PBSI clients. Good telephone manner, e-mail and writing skills to enhance communication with clients, volunteers and attendees. Strong computer skills, contract negotiation and RFP evaluation necessary.</p> <p>Meeting planning and management services: including, but not limited to:</p> <ul style="list-style-type: none"> <li>• Site selection</li> <li>• Contract negotiation</li> <li>• All aspects of meeting planning and trade shows including an excellent understanding of the registration process and the post-conference reporting process</li> <li>• Multiple client conference call logistics and fulfillment</li> <li>• Work closely with various departments: IT, Finance, and Creative Design</li> <li>• Troubleshoot solutions for any meeting challenges</li> <li>• Makes decisions significantly relating to service the client</li> </ul> <p>Exercised independent judgment with regard to serving the client</p>

### Substitution Guidelines

Degree	Degree and Experience Substitution	Related Experience Substitution
Associate's	2 Years	2 years
Bachelor's	Associate's + 2 Years	4 years
Master's	Bachelor's + 2 Years	6 years
Doctorate	Master's + 2 years	10 years

**Awarded Courses**

SIN Awarded	Course Title	Course Length	Min Participants	Max Participants	Contract or or Customer Site	Domestic or Overseas	Unit of Issue (e.g. Per Person, Per Course)	Price Awarded (including IFF)/Year 1
874-4/RC	Contract Accounting	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	DCAA Audit	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Winning Proposals	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Responding to RFP	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Contract Law	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Bidding on Construction	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Marketing to Federal Buyers	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	GSA MOBIS Schedule	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	8(a) Contracting	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	8(a) Transition Plans	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Federal Customer Relationship	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Technology and Fed Customers	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Contract Administration	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Marketing Websites	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Financing for 7(j)	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Effective Marketing	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Teaming Strategies	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Contract Negotiation	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Tax Obligations	8	1	40	Customer	Domestic	Course	\$1,007.50
874-4/RC	Source Selection	8	1	40	Customer	Domestic	Course	\$1,007.50

## **Training Course Descriptions**

### **Federal Government Contract Accounting and Record Keeping**

Small Businesses that support Federal programs/contracts are subject to a wide range of unique accounting regulations and requirements. Small government contractors must understand the accounting principles and standards pertaining to negotiation, performance, and termination. Accounting for Federal Contracts has its own unique and specialized rules, problems and hurdles. Without proper accounting practices and some type of system in place — at every stage of the contract — a contractor can be faced with *enormous* difficulties, including the loss of profits as well as the loss of contracts. This course is designed to provide the 8(a) owner with an understanding of the basic principles and uniqueness of Government Contract Accounting.

### **Preparing for a DCAA Audit**

At some point during the growth and development of your business, a government contractor can expect to be audited. But rather than create panic as it traditionally causes for many small businesses, 8(a) firms should manage their businesses in a manner that requires minimal preparation for anticipated government audit and welcome them as a public validation of their adherence to standards and principles. This course will assist 8(a) contractors in designing and customizing their Accounting Systems, Quick Books, Peachtree or Deltek to comply with Defense Contract Auditing Agency (DCAA). Participants will also have the opportunity to share experiences with business owners who may be using other types of accounting systems.

### **Developing Winning Cost Proposals**

This workshop is designed for both new and experienced business owners seeking to successfully compete as offerors for negotiated procurements. The workshop will cover the basics of developing a winning cost proposal and delves into what it takes to be successful in a highly competitive acquisitions environment. The course will focus on pre-RFP planning and positioning, solution analysis and development, and competitive analysis. The trainer will assist participants to effectively analyze an RFP, make an informed bid/no-bid decision, determine if you can make money on the contract and if so, how to proceed in responding to what the government requires and what your business needs to make a profit. This workshop will also include guidance on alternative pricing strategies, preparation for orals, tips for defending your bids and negotiation techniques.

### **Responding Competitively to RFP's, RFQ's and RFI's**

In many respects, decision buying agencies make regarding acquisition planning and source selection are driven by the responses they receive from solicitations. This is true particularly with acquisitions that are restricted to categories of small businesses—as well as acquisitions being considered for set asides. Winning a government contract requires business owners to respond to either, a Request for Proposal (RFP), Request for Quote (RFQ), or a sources sought, or Request for Information (RFI). Business owners who desire to work with the Federal government must understand the process of responding to these types of requests correctly and strategically. This workshop will discuss the key elements of responding to each of these requests and what is required to respond competitively and correctly including; analyzing the scope of work, preparing a response and understanding how the information prepared will be evaluated.

### **Contract Law, Legal Aspects of Owning and 8(a) Firm**

Understanding the legal issues of owning and operating a business is essential for successful participation in and transition from the 8(a) program. This workshop on some of the legal aspects of owning a business offers the 8(a) firm an overview of government contract law essentials. This course identifies the basic elements of contract formation, classifications of contracts, and contract strategies applying to validity and successful contract negotiations. The course will also cover rules of consideration, validity, illegality, the statute of frauds, third-party rights, employment contracts, breach, structure and governance of an 8(a) firm, change/transfer of ownership or control, graduation and termination from 8(a) program.

## **Estimating and Bidding on Construction Contracts**

Pricing construction jobs requires specialized experience and a set of very specific skills. An expert in pricing information technology service projects, despite his capabilities, may be seriously handicapped in a construction job costing environment. The focus of this workshop will be the pre-requisites and proven techniques for accurate and competitive construction estimating and bidding. These proven techniques may be used by both General Contractors (GCs) and specialty trades. The objective of this workshop is to outline, discuss, and demonstrate the process required to generate sustainable and profitable bids on construction contracts. The workshop also will examine pricing “green” construction requirements and the impact of environmental and energy conservation standards on construction pricing.

## **Marketing Your Services or Products to Federal Buyers**

Successful business owners must constantly sell their services and products to new customers and work feverishly to retain and grow their existing business base of satisfied customers. Marketing to the Federal Government is very much like marketing to any potential customer except the business owner must learn and understand what the Federal Government buys and how the Federal government buys services and products. This workshop will address the nuances of marketing to the Federal Government and a few specific topics including: Agency Forecasts, the Federal Budget Process, and the Acquisition Cycle, The importance of making contact with the buyer, and developing marketing strategies to maintain strong market presence.

## **Developing a GSA MOBIS Proposal**

This one-day workshop is designed to instruct and assist small business representatives to develop, step-by-step, and price applications (proposals) to obtain their GSA MOBIS (Mission-Oriented Business Integration Services) contracts. The workshop also provides substantial information about multiple-award task order contracts as they relate to Federal small business programs. This workshop will demonstrate for participants a proven strategy for effectively developing the MOBIS sections requiring executive summaries, corporate information, past performance information, Special Item Numbers, labor categories and descriptions and pricing formats. It will also discuss modifications to MOBIS contracts and responding to requests for GSA Schedule quotes.

## **Demystifying Federal Contracting for 8(a) Participants**

This workshop will help 8(a) business owners to understand and translate much of the deliberate syntax of federal laws, regulations, decisions and procedures into the clear and concise language

of their business models, technical proposals and strategic plans. This workshop covers selected portions of the Small Business Act, as amended; significant Federal agency statutory authorities, selected parts of the Federal Acquisition Regulation; sections 120, 121 and 124 of Title 13 of the Code of Federal Regulations; continuing 8(a) eligibility requirements; and major Office of Hearings and Appeals, court, GAO and other decisions. Rather than note coverage of provisions and rulings, the workshop identifies ten major aspects of successful government contracting (i.e.; Federal small business program office interactions, contractor teaming, mentor protégé programs, capture management), and discusses the statutes, rules and policies that provide guidance, authorities and limitations on activities within each step.

## **Developing 8(a) Transition Plans**

This workshop is aimed at 8(a) contractors in the transitional stage of program participation. The workshop offers government contracting strategies to survive after a contractor completes the nine-year program and/or exceeds the small business size standards. One focus will be establishing early linkages, or relationships, with both large and emerging contractors, including micro-enterprises with little or no past performance. The workshop will touch upon, but will not focus on transitional financing issues, and will focus primarily on the range of strategic alliances that must be formalized to ensure continued access to procurement opportunities. A goal of the workshop will be to discuss and encourage participants to implement various proven strategies for creating lasting mutually beneficial relationships among partners in the private sector. The workshop will include participation by large corporations and 8(a) graduates.



## **Managing Your Federal Customer/Relationship Management**

When marketing, 8(a) contractors, like all small government contractors, must develop relationships with small business program offices, contracts and agency program staff. Each has specific responsibilities in the acquisition process. Prime contractors must also clearly understand the roles of these individuals, their authorities and the limitations of their authorities. These relationships must be effectively nurtured from the point of opportunity identification to contract award. Following contract award, the nature of these relationships changes but managing them remains essential to success. For subcontractors, there are subtle and not-so-subtle differences, but effective relationship management remains critical. This workshop will examine the significance of these relationships for prime and subcontractors. It will also offer suggestions and proven strategies for maximizing the benefits of these relationships.

## **Technology and Your Federal Customers**

This workshop will cover technological developments from two perspectives: The impact of leading edge technologies on products and services procured by the Federal government; and utilizing technology to enhance the productiveness of your business and to gain an edge on the competition. Included in the presentation will be a discussion of green, energy efficient, technologies and their emergence in government acquisitions. The workshop will also include a comprehensive discussion of the Small Business Innovation and Research/Technology Transfer programs. It will also address anticipated major Federal initiatives that will hinge on developing new technologies and products based on those technologies. The Workshop will also focus on the impact that emerging technologies are having on science, engineering and information technology solutions.

## **Contract Administration and Subcontract Management to ensure Follow-on Work**

Now that you've been awarded the contract, technical performance alone does not ensure success. Contract management, or contract administration, can also affect contract success and future past performance ratings! In this workshop, participants will learn how to avoid legal pitfalls and disasters. A range of topics will be covered to ensure that participants understand all parameters of successful contract performance. Additional issues associated specifically with subcontract management will be addressed. Topics will include project management and managing milestones and deliverable schedules, project reporting, invoice management, staffing, status meetings, quality control and assurance, and customer service. The subjects will be discussed from both a single and multiple task order environment.

## **Designing Your Marketing Website**

A thorough knowledge of Internet marketing includes a comprehensive understanding of emerging technology, effective web page layout and design, search engines, interactive applications, web-based shopping and purchasing applications. Workshop sessions will examine the basic tenets of designing a marketing website for easy navigation. By the end of the training, the participant will understand how a simple well-designed web site will create a significant increase in the numbers of pages viewed by each visitor. The goals of the workshops will be to assist participants to increase "hits", signups, customers, sales, and encourage visitors to a participant's site to explore web pages in greater detail.

## **Alternate Financing for 7(j) eligible Contractors**

Small Businesses often have a hard time securing traditional debt, or "bank," financing for their businesses. The old saying that "it takes money to make money" certainly pertains to small business owners. Small business Owners have to be creative and knowledgeable of all financing options available to them. This workshop will address the various financial programs available to small business owners for start-up as well as existing enterprises, for a variety of general business purposes. Specific topics to be discussed include: Sources of Financing, SBA Loan Programs, Equity Financing, Types of Lenders, Capital Requirements, and other alternative means of financing your business.

## **Effectively Managing Your Business: the Key to your Growth & Development**

Successfully managing a business requires specific management skills in addition to knowledge of key business practices for your specific industry. This workshop will assist participants in understanding the key components of managing a business to

yield success, including: a solid knowledge of your business industry; strong leadership skills, decision-making skills, employee management, and flexibility. Additionally, the workshop will review a myriad of other important topics critical to managing your business including: marketing basics, pricing your products or services, business taxes, legal structures, forecasting for future growth, and options for financing your businesses.

### **Effective Teaming Strategies: Marketing Primes, Larger Small Businesses & Other Small Businesses**

The workshop covers several elements of strategic positioning and teaming, focusing on making the business case for and building and participating on contractor teams, developing mutually beneficial mentor protégé proposals, developmental assistance plans, and forming joint ventures that, in addition to meeting regulatory requirements, embrace proven strategies and formats that have been acceptable to Federal contracting officers. The workshop will walk participants through the process of developing and negotiating sound non-disclosure agreements, contractor teaming agreements, joint venture agreements and subcontracts. The workshop will also focus on developing effective language for the management plans they must include with their technical proposals that clearly and concisely describe how prime contractors or managing joint venture partners will manage and operate the contractor team.

### **Contract Negotiation Techniques**

A vital skill needed in procurement is the ability to negotiate effectively. Almost every level of contracting involves negotiations—over small and large issues. This course provides participants with a solid battery of strategies, tactics and skills that are effective in contract formation and contract negotiations. This course also recognizes that how a contractor negotiates depends greatly on her personality and individual style. Exercises in this class will provide participants with insight into their negotiation styles and personal techniques. The skills gained from this course can be immediately applied to other contracting situations where formal and informal negotiations of all dimensions take place.

### **Federal Tax Obligations for Small Businesses**

To stay on good terms with the Internal Revenue Service, business owners need a basic understanding of the tax system. While a thorough understanding of every detail of the tax code is generally the responsibility of a company's CFO or contracted CPA, business owners do need to know when to ask for advice to maximize deductions, tax credits, and savings, and how to adjust to changes in the federal and state tax codes. This workshop will address the importance of business owners paying their fair share of taxes; but will also include an understanding of how to minimize their liabilities for Federal, state and local tax obligations. It will address employee withholding and business taxes and employee deductions and payroll management.

### **Source Selection and Contract Award**

As business owners pursuing federal contracts, workshop participants need a thorough understanding of the federal source selection process. This knowledge is critical to developing and implementing effective capture strategies. In other words, to increase the likelihood of being the winner, 8(a) contractors must understand how a government agency picks the winner. One of the most critical steps facing agencies and contractors in government contracting is source selection – the process agencies follow to choose among competing proposals. Through lecture and comprehensive case study, this hands-on course will provide participants with a number of major benefits, including a solid understanding of the selection process, checklists, responsiveness and responsibility, pre-award audits, affiliation and size determinations, participants on source selection teams and their roles, internal rules and guidelines. This knowledge will form the basis for sound business decision analysis and decision making with respect to capture strategy and forming winning capture teams. This workshop offers industry professionals a wealth of insights into the source selection process and the tools to use those insights to develop effective, winning proposals.

**Awarded Other Direct Costs (ODCs)**

<b>SIN Awarded</b>	<b>Support Product (ODC's)</b>	<b>Contractor or Customer Site</b>	<b>Unit of Issue (e.g. Hour, Task, Sq Ft)</b>	<b>Price Awarded (including IFF)/Year 1</b>
C541-1000/RC	Push to Talk MIC	Customer Site	Per Day	\$ 65.49
C541-1000/RC	Push to Talk MIC Controller	Customer Site	Per Day	\$ 226.70
C541-1000/RC	Power Speaker	Customer Site	Per Day	\$ 75.57
C541-1000/RC	LCD Projector	Customer Site	Per Day	\$ 352.64
C541-1000/RC	4 Channel Mixer	Customer Site	Per Day	\$ 40.30
C541-1000/RC	Getner Box	Customer Site	Per Day	\$ 226.70
C541-1000/RC	Audio Mixer board	Customer Site	Per Day	\$ 176.32
C541-1000/RC	Telephone Line	Customer Site	Per Day	\$ 125.94
C541-1000/RC	Telephone Interface	Customer Site	Per Day	\$ 166.25
C541-1000/RC	VGA DA	Customer Site	Per Day	\$ 136.02
C541-1000/RC	Prox Data Proj/Screen	Customer Site	Per Day	\$ 982.37
C541-1000/RC	Computer Laptop	Customer Site	Per Day	\$ 327.46
C541-1000/RC	Broadband Internet	Customer Site	Per Day	\$ 251.89
C541-1000/RC	Sound System	Customer Site	Per Day	\$ 151.13
C541-1000/RC	AV Tech/Hour	Customer Site	Per Hour	\$ 74.81
C541-1000/RC	Meeting Room (Small)	Customer Site	Per Day	\$ 503.78
C541-1000/RC	Meeting Room (Large)	Customer Site	Per Day	\$ 6,045.34
C541-1000/RC	Ground Transportation	Customer Site	Per Person	\$ 28.21
C541-1000/RC	Air Fare	Customer Site	Per Person	\$ 537.83
C541-1000/RC	Per Diem	Customer Site	Per Person	\$ 82.62
C541-1000/RC	Honorarium	Customer Site	Per Person	\$ 2,518.89
C541-1000/RC	Shipping	Customer Site	Per Package	\$ 35.67
C541-1000/RC	Printing	Customer Site	Per Page	\$ 0.06
C541-1000/RC	Hotel	Customer Site	Per Day	\$ 249.95
C541-1000/RC	Catering/Breakfast & Snack	Customer Site	Per Person	\$ 11.08
C541-1000/RC	Binders (1' Binder/ 6pk)	Customer Site	Each	\$ 9.76
C541-1000/RC	Tabs (Index Marker/5Tab)	Customer Site	Each	\$ 23.67
C541-1000/RC	Postage	Customer Site	Per Letter	\$ 0.42

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