

## State of New Jersey Division of Purchase and Property E-Buy RFQ # 768892S

### Volume I: Required Forms and Technical Proposal

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**April 8, 2013**

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## 1.0 Technical Proposal

### 1.1 Understanding of the Work

Hurricane Sandy moved up the east coast of the United States on October 29, 2012 bringing extreme winds, storm surges and flooding. Some of the heaviest damage was in New Jersey, one of the country's most densely populated urban areas, where it displaced approximately 100,000 people. Sandy damaged or destroyed more than 72,000 homes and businesses in New Jersey alone. It was rated the deadliest and most destructive tropical cyclone of the 2012 Atlantic hurricane season, as well as the second-costliest hurricane in United States history.

To help the citizens of NJ, Governor Chris Christie's Administration submitted a plan to the Federal Government outlining how the state intends to spend nearly \$1.83 billion to help victims of Hurricane Sandy. The State of NJ expects the Federal Government to approve these funds in April 2013. The plan includes \$825 million to help homeowners rebuild and elevate their homes. It also sets aside more than \$254 million for renters and \$500 million for the New Jersey Economic Development Authority to help businesses with grants and other programs.

Under a law signed into effect on March 27<sup>th</sup> by Governor Christie, a network of state monitors was established to oversee recovery and rebuilding efforts. Checks and balances are also being established to review the procurement process for state contracts utilizing federal reconstruction money. As such, the State of NJ has stepped in as a leader, monitoring and publically displaying expenditures for all rebuilding project efforts totaling more than \$5 million. Anything under that amount is submitted to the discretion of the state treasurer.

As part of this monitoring effort, the State of New Jersey is contracting strategic consultant services to support all facets of intermediate and long term recovery efforts. The Procurement Bureau, Division of Purchase and Property is thus seeking vendors that can help monitor the State's recovery efforts, as well as assist with compliance and reporting of those efforts according to Federal and State requirements.

The State intends to award a Blanket Purchase Agreement (BPA) that includes three activity pools: program and process management auditing; financial auditing and grant management; and integrity monitoring/anti-fraud support services for disaster recovery.

The Addx Team would like to assist with activities in the third pool – integrity monitoring/anti-fraud support services for disaster recovery. As part of our assistance, we will independently monitor financial and operational performance against management and contract objectives. Further, the Addx Team will mitigate risks and strengthen the State of NJ's contract competence. In essence, we will be your "eyes and ears" that assist the State of NJ in identifying the undetected risks.

### 1.2 The Addx Advantage

In response to the requirements set forth by the VA, Addx has brought together a team with extensive investigative and monitoring expertise. Our combined experience and ability to foster collaboration and build consensus among stakeholders with different backgrounds and competing priorities make the Addx Team an ideal candidate to the perform work under this BPA.



Addx is a Service-Disabled Veteran-Owned Small Business (SDVOSB) verified by the Center for Veterans Enterprise (CVE) with the Department of Veterans Affairs. Headquartered in a Top Secret-cleared facility in Alexandria, VA, our award-winning professional services firm brings the requisite experience to perform program management and provide monitoring

and investigative support. A multi-year recipient of both *Inc. Magazine's* "Fastest Growing Private Companies in America" and *Washington Technology's* "Fast 50" awards, Addx provides agile, high-impact Good Government solutions that deliver measurable public sector return on investment and improve efficiency and effectiveness while remaining focused on mission accomplishment.

*Registered in the Contractor Performance Assessment Reporting System (CPARS), Addx earns "exceptional" ratings in its evaluations.*

We bring the requisite experience and needed capability to support the State of New Jersey across the functional areas described in the State's Request for Quote (RFQ), most notably in **Pool 3 - Integrity Monitoring/Anti-Fraud**. We provide comparable services to the Department of Veterans Affairs, Center for Veterans Enterprise (CVE) and for the U.S. Army Corps of Engineers Hurricane Protection Office (HPO). Other Addx Government clients include DHS (HQ, TSA, CBP, CIS), DOD (AT&L, Joint Staff, Army, Navy, Air Force), DOE (EIA), Commerce (USPTO), Agriculture, Interior, HUD, and GSA.



Our Partner in this endeavor is Computer Evidence Specialists, LLC (CES), a Minority-owned, Small Disadvantaged Business and a Service Disabled Veteran Owned Business (SDVOB) registered in the State of New Jersey (NJ#0400334857). CES was founded in 2002 with a focus on anti-fraud programs and the investigation and analyses of fraud issues. It developed a specialized focus on healthcare program integrity issues, particularly within the Medicare arena. CES currently supports the Center for Medicare & Medicaid Services (CMS) on the Zone Program Integrity Contracts (ZPIC) zone 4 and 5, the National Provider Site Inspection/Visits contract, National Benefit Integrity MEDIC contract and the National Part C and D Compliance Audits. They also provide investigative personnel on a nationwide U.S. Postal Office of Inspector General (OIG) Services contract. CES is a leader in anti-fraud initiatives focusing on healthcare benefit integrity programs and fraud, waste and abuse in the healthcare arena. Its work in these arenas has been lauded by CMS, the Federal Bureau of Investigation (FBI), the Department of Health and Human Services (HHS-OIG), and numerous private healthcare companies.



Based in Colorado, Broad Spec provides a comprehensive suite of capabilities in programming, design, administration and oversight of construction projects. It is also expert at assessing building safety and damages after disasters. For example, as part of Broad Spec's work following the Loma Prieta earthquake, its inspectors entered both residential and commercial facilities to make hazard assessments. With more than 250 professionals knowledgeable in all aspects of building development (engineers, architects, building officials, health and life safety professionals, and building inspectors), Broad Spec is uniquely qualified to join the Addx Team as it seeks to assist in this effort.

Together, Addx, CES and Broad Spec (the Addx Team) have a solid, award-winning record of integrating business solutions and management disciplines to improve clients' critical mission performance. **Figure 1** provides the State of New Jersey with highlights of our support as well as our core services.

Addx Expertise / Benefit to the Customer	
<b>Program Management Support:</b> <i>Addx builds trusting relationships with program executives to deliver best practices, increase program clarity and respond to emerging needs.</i>	<ul style="list-style-type: none"> <li>Better likelihood of success in identifying fraud</li> <li>Improved cost effectiveness for the anti-fraud effort</li> <li>Increased customer confidence that we can deliver results quickly and accurately</li> </ul>
<b>Management Consulting Services:</b>	<ul style="list-style-type: none"> <li>Targeted human resources dedicated to the antifraud effort</li> </ul>



<b>Addx Expertise / Benefit to the Customer</b>	
<i>We help clients develop practical, measurable and effective management solutions that increase organizational success.</i>	<ul style="list-style-type: none"> <li>• Honed knowledge management for fraud identification, information sharing</li> <li>• Accurate studies and analyses to support New Jersey’s antifraud effort</li> </ul>
<b>Technology Services:</b> <i>Addx delivers a full lifecycle engineering approach. Experts build comprehensive roadmaps as foundations for successful project execution from start to finish.</i>	<ul style="list-style-type: none"> <li>• Technical authority to support the mission, ensuring accuracy and efficiency</li> <li>• Information Assurance enhancing quality of deliverables and improving communication</li> <li>• Technology Transition facilitating processes</li> </ul>

**Figure 1: Addx Expertise and Benefits to the State of New Jersey**

### **1.3 Accomplishing the Scope of Services**

Our approach for accomplishing the Scope of Services comes from our capabilities, experience, and people. The Addx Team has supported contracts of similar size, complexity, and requirements. For example, under contract with the VA, Addx provides investigative services to the Center for Veterans Enterprise (CVE) to determine the eligibility of companies to receive status as verified Veteran Owned Small Business (VOSB) and Service-Disabled Veteran Owned Small Businesses (SDVOSB) for the purpose of specially designated set-aside Federal contract procurements. This is directly comparable to the State of New Jersey’s effort to ensure that expenditures for disaster relief are actually reaching the people who truly need them. When contractors misuse these set asides, they directly harm those who need them – just as misusing disaster relief funds directly harms those most affected by Hurricane Sandy.





### **1.5 Similar Services Provided**

The Addx Team has extensive experience providing fraud investigation services similar to those requested by the State of New Jersey. Our experience ranges from advisory and assistance services on the implementation of an expanded fraud identification program to oversight, audit and anti-fraud, waste, and abuse services field work.



<b>Department of Veterans Affairs – Verification On-site Examination Services</b>	
<b>Type:</b> Firm Fixed Price	<b>Budget:</b> ██████████
<b>Description of Services:</b>	
<p>The Department of Veterans Affairs (VA) Center for Veterans Enterprise (CVE) promotes business ownership and expansion for Veterans and service-connected disabled Veterans to increase participation in the Federal marketplace with emphasis on VA work opportunities. A key component to increase participation is CVE’s Verification program. Addx examiners perform on-site examinations of Service Disabled Veteran Owned Small Businesses (SDVOSBs) seeking entrance into the VA’s Veterans First Contracting Program. These on-site examinations include a detailed examination of official business records and corporate operations, on-site interviews, and an evaluation of the subject’s business property; ensuring boundaries and areas are consistent and documented. These evaluations and the resultant data provide the input needed to assist in the overall decision and rating of the subject business by the CVE. Addx examiners utilize an understanding of economic theories, business information, financial reporting systems, accounting and auditing standards and procedures, data management &amp; electronic discovery, evidence gathering and investigative techniques, and litigation processes and procedures to perform their work. The Addx Team has continuously provided updated guidance and information relative to improvement of the site visit and its processes. Our Forensic Examiners are continuing to evolve in terms of utilizing technology to assist in engagements to identify anomalies and inconsistencies while tracing relative assets and data. The program is now nationally recognized. In addition and as a result of these efforts, we provide valuable insight to the House VA Committee (HVAC) with overall positive results.</p>	
<b>Department of Veterans Affairs – Subcontractor Compliance Review</b>	
<b>Type:</b> IDIQ	<b>Budget:</b> ██████████
<p>As part of the Veterans Benefits, Health Care, and Information Technology Act of 2006, legislation was enacted to enable the Department of Veterans Affairs to implement a “veterans first” approach to VA-specific contracting. This new legislation authorized a special contracting authority to set aside contracts for Service-Disabled Veteran-Owned Small Businesses (SDVOSB) and Veteran-Owned Small Businesses (VOSB) on either a sole source or a competitive basis. The Veterans First Contracting Program permits VA contracting officers to give special consideration to teams that include SDVOSB and VOSB as subcontractors on full and open competitive bids. Addx conducts VA Subcontractor Compliance Reviews in support of VA Center for Acquisition Innovation, evaluating whether small businesses are performing the percentage of work as specified in the subcontracting or set-aside criteria, and whether large companies are meeting their stated subcontractor commitments.</p>	
<b>Medicare Drug Prescription Integrity Contractor – NBI MEDIC</b>	
<b>Zone Program Integrity Contractor- Zone 4</b>	
<b>Type:</b> Subcontractor to Health Integrity /IDIQ-Task Order	<b>Budget:</b> ██████████
<b>Description of Services:</b>	
<p>The ZPIC IDIQ Contract provides oversight, audit, and anti-fraud, waste, and abuse services related to Medicare Parts A, B, C, DME, Homes Health and Hospice for: TX, NM, OK, CO. Additionally, three of the four Zone 4 state have agreed to participate in the Medi-Medi Program (e.g., a comparative evaluation of Medicare v. Medicaid claims for services for the same beneficiaries). CES’s efforts include the following tasks: Performing Proactive Analysis, Data Analysis and Data Mining, Conducting Medical Reviews Related to Benefit Integrity Investigations, Supporting Law Enforcement for Answering Complaints and Providing Supportive Claim Data on Providers and Beneficiaries, Investigating Fraud and Abuse, Recommending Recovery and Federal Funds Through Administrative Action, Pre-Payment Edits, and Revocation, and finally, Refer Cases to Law Enforcement Participate in ALJ Hearings as needed.</p>	

**Figure 3: Description of Similar Projects**

## 2.0 Management Overview

### 2.1 Meeting the Requirements of the RFQ

Integrity monitoring and fraud risk management are ongoing processes, requiring continuous monitoring of regulatory requirements with an eye toward marketplace expectations. The Addx Team has experience creating customer specific requirements, establishing a regulatory compliant program using these steps:





The Addx Team’s in-depth federal experience directly translates to identifying, mitigating and preventing losses of federal funds and assets through fraudulent acts

## 2.2 Understanding the Objectives

The State of New Jersey wants to ensure grant money is used for its intended purpose -- rebuilding areas damaged by Hurricane Sandy. We understand the importance of restoring order and rebuilding after catastrophic events and are familiar with the potential for fraudulent activities by entities attempting to take advantage of the organization left vulnerable. The Addx Team seeks to support the State of New Jersey’s mission and ensure that all grant funds are protected from individuals, organizations, or groups who are not the intended recipient or those that do not qualify for assistance. It is also our goal to continuously monitor and audit recipients to ensure that they receive and utilize funds for their intended purpose. Conversely, our Team will aid the State of New Jersey in the identification and recovery of misappropriated and/or fraudulently obtained funds as well as in remediation to ensure the program continues to adapt to the changing environment where fraud, waste, and abuse thrives.

## 2.3 Technical Approach

The Addx Team delivers unique capabilities to support forensic investigations, integrity monitoring, and anti-fraud services. Our Director of Forensics and Investigations, [REDACTED] has significant experience with data mining, financial investigations and reporting; he currently [REDACTED]

As part of the Veterans Benefits, Health Care, and Information Technology Act of 2006, legislation was enacted to enable the Department of Veterans Affairs to implement a “veterans first” approach to VA-specific contracting. While the intent of the Veterans First Contracting Program was to give SDVOSB and VOSB a competitive advantage when competing for VA contracts, a recent Government Accounting Office



study uncovered troubling findings of a program riddled with fraud and inaccuracies. In order to restore the program’s integrity, VA implemented controls to eliminate fraud and abuse.

### 2.3.1 Integrity Monitoring/Anti-Fraud

#### 2.3.1.1 Forensic accounting and all specialty accounting services

**Forensic accounting, forensic accountancy or financial forensics** is the specialty practice area of accountancy that describes engagements that result from actual or anticipated disputes or litigation. "Forensic" means "suitable for use in a court of law"; is to that standard and potential outcome that forensic accountants generally have to work.

Financial forensic engagements may fall into several categories. For example:

- Economic damages calculations, whether suffered through tort or breach of contract;
- Post-acquisition disputes such as earnouts or breaches of warranties;
- Bankruptcy, insolvency, and reorganization;
- Securities fraud;
- Business valuation; and
- Computer forensics/e-discovery.

Engagements relating to criminal matters typically arise in the aftermath of fraud. They frequently involve the assessment of accounting systems and accounts presentation—in essence determining whether or not the numbers reflect reality.

Forensic accounting can best be performed by establishing procedures and checks which will result in red flags such as; duplicate payments, false vendor records, and erratic or lack thereof time keeping procedures, can signal suspicious behavior.

[REDACTED]

This approach incorporates both rule-based and modeling tools in a real-time monitoring environment, with a feedback loop that supports continuous improvement.

Three key elements are used to establishing and maintaining the continuous loop:

[REDACTED]

A degree of forensic accounting is applied during the examinations conducted under the VA contracts for CVE and SCR, where records of income are derived from payroll reports, tax records, and contracts. Corporate legal documents are also reviewed to determine corporate ownership and control as well as compliance with requirements for government contracts set forth by the VA.

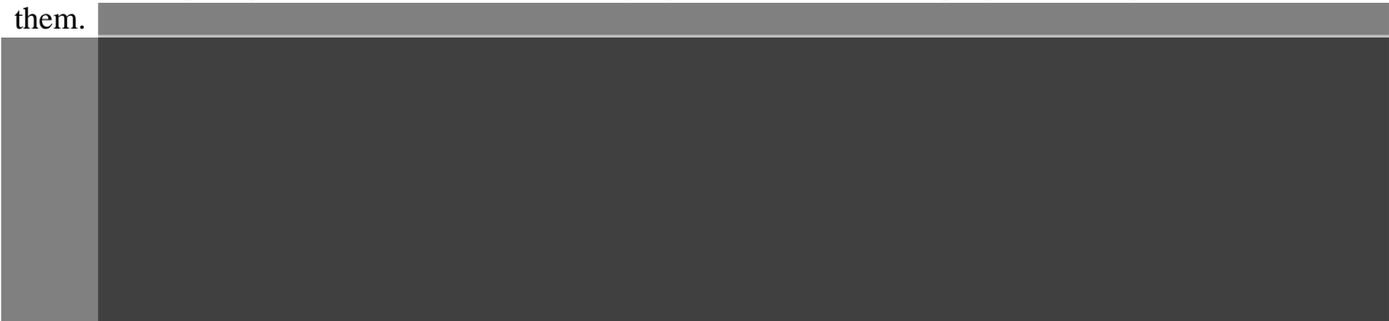


Our personnel have identified millions of dollars in fraud resulting in referrals to federal law enforcement for prosecution. CES has personnel in New Jersey who are experienced in fraud investigations and audits and maintained an office in Brick, NJ for several years.

**2.3.1.2 Risk assessments and loss prevention strategies**

As NJ strives to mitigate risk and prevent to loss and/or misappropriation of disaster recovery funds, the Addx Team can help supporting its efforts to ensure all recipients of grant funds are eligible for United States Department of Housing and Urban Development (HUD) and United States Federal Emergency Management Agency (FEMA) Public Assistance grant funding and that all work is performed in accordance with HUD, FEMA and other applicable federal and State regulations, policies and guidance including, but not limited to, Davis-Bacon Act (40 U.S.C. 276a to 276a-7) and Clean Air Act (42 U.S.C. 1857 (h)).

Addx personnel has the experience to recognize construction fraud related to various project elements such as schedule, quality and costs, to include identifying the risks and developing an action plan to deal with them.



This may be accomplished by the following:



The best way to address fraud is to mitigate and establish safeguards and parameters to prevent the unwanted event from taking place through measures such as the following:

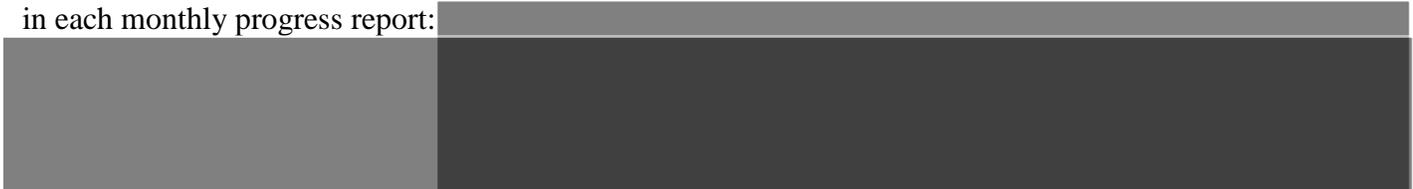




**2.3.1.3 Performance and program monitoring and promotion of best practices as applicable to each task order issued under this contract**

The Addx Team, will use a variety of methods to achieve open and current communications with each other. There will be regularly scheduled meetings between the PM, examiners, and New Jersey staff to ensure that all personnel are operating efficiently. The PM will maintain close contact with New Jersey to coordinate and request information and will be the central point of contact between the Addx Team and New Jersey. Communication will be maintained on both a formal and informal basis.

The Addx Team will provide New Jersey with progress reports sent by Addx management to the New Jersey POC. The report will adhere to protocol established between the Addx Team and the New Jersey POC based upon the State's needs. The report will be written in understandable language and render any recommendation for program implementation. For example, Addx may include the following information in each monthly progress report:



The PM will work with the New Jersey POC as appropriate to assist in contract commencement and to establish understanding of the requirements. After establishing this common understanding, our PM, [redacted] will confer with Team members to make a technical assessment and identify the best allocation of Team resources to complete each Task and assignment. Addx will furnish all necessary supervision, personnel, facilities, transportation, supplies, and equipment to produce the deliverables necessary to fulfill the various Tasks of this contract.

Following each deliverable, the Addx Team will analyze the deliverable development process and outcomes to identify areas for process improvement. Specifically, the Team will review any applicable stakeholder satisfaction feedback provided by New Jersey as well as any issues that arose during the deliverable



development process. From this review, we determine whether process improvements are possible. Process improvements may also be identified on an ad-hoc basis and not just upon completion of a deliverable.

**2.3.1.4 Fraud and misconduct investigation, prevention, detection and remediation;**

The Addx Team’s experience in the intelligence and law enforcement community provides unique insight into a wide range of standards, practices, and principals for detecting and combating fraud. Our forensic team members have unique experience (law enforcement; investigative and forensic examiners) in identifying illicit financial networks, following the money, and accessing the right data sources, with understanding of how to utilize such data to create actionable intelligence to support prevention efforts. Our approach requires timely access to [REDACTED] is a key element of our anti-fraud programs and controls. The primary objective of the [REDACTED] facing the State of New Jersey and to overall performance by identifying, acknowledging, and controlling fraud risks that threaten its vital resources. As a first step to any fraud risk assessment, individuals need to have the in-depth knowledge of the culture and the potential schemes that may be taken. The Addx Team will identify those critical areas where internal controls may need to be strengthened and provides assurances to the State of New Jersey that the risk of fraud is being effectively managed. The Fraud Risk Assessment is identified as the first step in identifying potential frauds that *could* occur. The Addx Team’s mission is to prevent these frauds before they occur, to detect frauds and fraud attempts as soon as possible, and to remediate the fraud discovered.

The Addx Team’s in-depth federal experience directly translates to identifying, mitigating and preventing losses of federal funds and assets through fraudulent acts. To this end, the Addx Team will [REDACTED]



Upon detection, the entity is reported with a detailed analysis of findings and recommended follow-up, to the New Jersey POC. The New Jersey POC is given access to the examiner for further clarifications to create a partnership environment as we share a mutual goal of program integrity. Remediation takes place throughout the entire process and program to evaluate the effectiveness of the program and efforts are achieving the intended results, which is providing qualified recipients the benefits they deserve.

**2.3.1.5 Implementation and management of appropriate compliance systems and controls required by State and Federal governing guidelines, regulations and law**



The Addx Team will review with the State of New Jersey processes and systems of internal controls and, as appropriate, document its findings in order to rate these processes' and systems' ability to monitor potential

fraudulent activity and identify financial anomalies. Processes and systems for consideration include, but are not limited to:

- Contracting processes
- Contract payment processes
- Key systems of internal controls over contract billings, payments, invoices, acceptance of deliverables, SOWs, and quality assurance over contracting processes.

Addx is familiar with the Federal, State (including NJ) and local regulations governing the prevention of fraud, waste, and abuse. These laws and regulations include, but are not limited to, criminal violations covered under Title 25 Frauds and Fraudulent Conveyances of the New Jersey State Penal Code. Federal criminal violations would be primarily pursued under Titles 18 (criminal) and 31 (civil) of the U.S. Code (USC) under specific sections. These include, but are not limited to 18 USC 1001, False Statements; 18 USC 287, False Claims; 18 USC 1031, Major Fraud against the United State and 31 USC 3729, False Claims Act. VA Site Examiners often conduct investigations of business registered and/or operating in the state of New Jersey and are thereby familiar with state licensing regulations, tax requirements, and laws governing business, organizations, and individuals within the state.

Applicable laws and regulations are incorporated at every stage of program implementation as well as throughout the execution of the program. As the Code of Federal Regulation (CFR), title 38, section 74, and Veterans Administration Acquisition Regulations (VAAR) 852 provide the primary guidelines for Addx's contracts with the VA, we've built the program and structured audits with them as the primary basis for inclusion and compliance. There are numerous other laws and regulations that must be taken into consideration in terms of other areas of fraud, waste, and abuse. Addx personnel are located nationally and are mobile, which will be valuable in support of developing and gathering information for prosecution of violators outside of the State of New Jersey's jurisdiction under federal law. All other information identified and gathered regarding potential fraud will be developed for consideration of prosecution under New Jersey State Law (Title 25 of the New Jersey Penal Code) or federal law. As previously stated violations under federal law would be pursued under Title 18 USC covering criminal violations such as False Claims, False Statements, Major Fraud Against the United States, Bribery and Title 31 USC, Section 3729 – False Claims Act.

The requisite laws, regulations, and guidelines are incorporated into the initial and on-going training of site examiner staff, with continued revisions of the program operating manual and reporting requirements established with the VA. Requisite documents are uploaded into the Addx portal, where examiners, management, and approved entities may remote access from their computers. Documented in monthly program status reports, Addx confirms receipt and incorporation by acknowledging and describing our efforts in established sections for those respective topics in the monthly status reports.

***2.3.1.6 Development and implementation of policies and procedures to assist in ensuring that program requirements are met, including preventing a duplication of benefits, and measures to detect and prevent fraud, waste abuse and mismanagement of funds; Compliance with Federal and State laws, and DRGR regulations as applicable***

The Addx Team consists of highly trained examiners proficient in the field of fraud investigations that are able to utilize skilled interviewing techniques as a means to assist in the identification of ownership and control. They are attuned to soliciting answers with respect to the question at hand. Our examiners are also proficient in report writing and can provide a report that identifies thorough, accurate and complete results that identify the facts as well as highlight and document any deficiencies and inconsistencies in the document review with respect to financial authority and business operations.



During the investigation, examiners may conduct interviews, observe the facilities, and review documents. If necessary and when appropriate, pictures can be taken for proof and/or accurate representation of reported information. The intent of the reviews is to maintain continued monitoring as well as the environment that any entity may be audited throughout the time included in the program, in an effort to deter certain entities from attempting to defraud the system.

Active records of completed investigations will be maintained and cross referenced to ensure entities identified as ineligible or restricted from program access do not receive benefits, as well as entities already receiving benefits do not receive a duplication of benefits.

A key differentiator for our team is [REDACTED]

[REDACTED] The Addx Team will have access [REDACTED]

[REDACTED] Our queries also include a search of [REDACTED] database search engine. This information, to include any developed leads, is thoroughly reviewed and documented then included in the examination of the applicant to determine eligibility.

Our examiners are proficient in generating reports that provide pertinent information from interviews conducted with the business owner(s) and key personnel detailing the facts to support our recommendations regarding the eligibility of the business. After completion of an investigation, the Addx Team will finalize the review, and findings will be shared with New Jersey in a report structured by the areas of review and the questions inquired.

The Addx Team will also leverage data sources and tools to begin a comprehensive forensic accounting investigation of illicit targeted individuals, entities, and any potential connection to fraudulent networks:

### **2.3.1.7 Compliance with local regulations and ordinances as applicable**

Addx personnel are experienced with working under the same Federal and State laws, regulations, and standards regarding information. These include, but are not limited to, Federal Information Security Management Act (FISMA), Appendix III of OMB Circular A-130, and guidance and standards, available from the Department of Commerce National Institute of Standards and Technology (NIST).

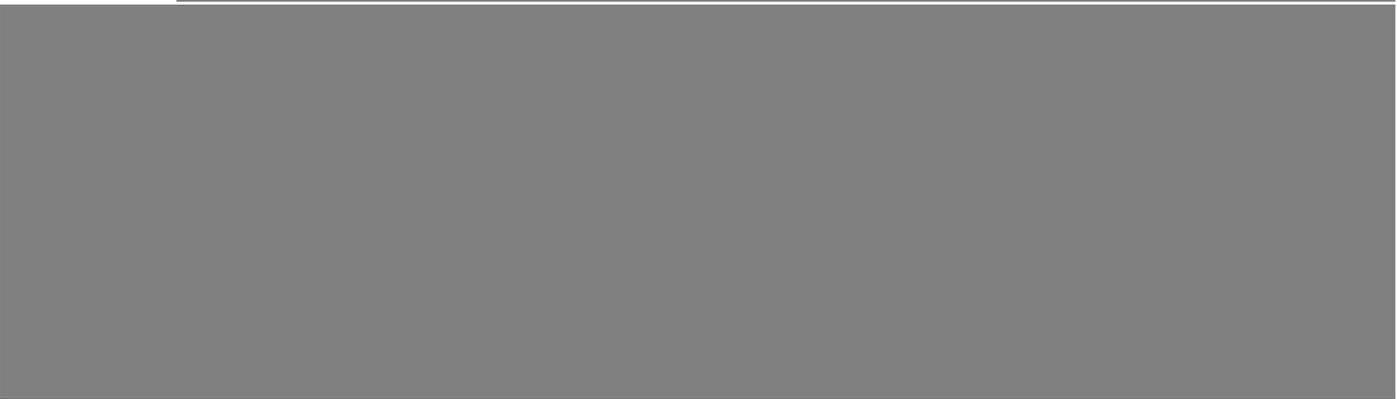


The Addx Team’s experience in the intelligence and law enforcement community provides unique insight into the authorities and enforcement capabilities of each. All information and documentation obtained will be in compliance with federal statutes and the New Jersey Penal Code for prosecutorial consideration. Addx will refer all suspected federal violations to the Department of Homeland Security, Office of Inspector General (OIG), the investigative branch of FEMA for action deemed appropriate. Addx will refer all suspected state violations to the New Jersey “Statewide Sandy Fraud working Group,” which was created to serve as New Jersey’s clearinghouse for investigations and prosecution of criminal and civil fraud related to Superstorm Sandy and the recovery process. Addx will coordinate and work closely with the “Statewide Sandy Fraud Working Group” as well as the Department of Homeland Security OIG to insure compliance with appropriate state and federal laws, regulations and ordinance for preservation of evidence developed. The areas of potential criminal or civil violations for referral would include false claims, misrepresentations, bid rigging and bribery (not all inclusive). As part of our recommendations within the targeting packages, our team can provide advice as to which agency has the requisite titles, authorities, and capabilities that can be leveraged for further action.

**2.3.1.8      *Disseminate information regarding the Anti-Fraud hotline maintained by the Office of the State Comptroller***

Addx understands the importance of maintaining several outlets to which to report suspected fraud, and supports the promotion of all outlets. We have experience with the promotion and inclusion of media and hotline outlets, as it aids in the effort to prevent fraudulent activity. Addx additionally promotes support hotlines for participants in the Veterans First program who have questions regarding the verification process for becoming eligible to participate in procurements to veteran set-aside contracts. Site examiners are educated upon entrance into the program as to the details of the hotline, services the hotline provides, as well as other areas to obtain important information such as websites and mailing lists. Addx will utilize this same network, as well as the Addx corporate website, to promote any outlets available for reporting suspected fraud of grant funds.

**2.3.1.9**



***Financial Intelligence Data Mining***

Data analytics is the process of transforming raw data into actionable information. This information may include the identification of previously unknown patterns, trends, outliers, anomalies, and other indicators of illicit financial activity. The ability to draw conclusions and make predictions from this information is critical to the preventing fraudulent activity. These conclusions can include identifying:

- direct or indirect correlation between data,
- new and emerging risks, and

- systemic weaknesses and vulnerabilities.

Our Team also has access to a broad spectrum of commercial and business intelligence data, both globally and locally sourced, which can incorporate additional data points to develop baselines and synthesize contextually meaningful analysis. The Addx Team will actively coordinate with appropriate POC for identification of any other potential fraudulent schemes identified throughout recovery phase for inclusion in data mining process. We will coordinate with the Fraud Prevention & Investigative Branch (FPIB) of FEMA and institutions managing/maintaining payment/claim information in an effort to identify anomalies in the following areas:

- Duplicate payments

### **2.3.1.10 Reports and Recommendations**

The exploitation of the financial data yields reports that provide a comprehensive understanding of the money movement with appropriate substantiation and recommendations. The conclusions and recommendations delivered in the intelligence and target packages will receive a prosecutorial level scrutiny and a clear, available audit trail. When effective action is taken, disruption to the network often results in displacement of resources and methods used by the bad actors. We can use our institutional knowledge, expertise, and analytical capability to anticipate alternative methods to finance and supply targeted groups.

### **2.3.2 Deliverables and Due Dates**

Deliverables to be provided to the State of New Jersey include:

- Monthly reports on activities conducted for each task to include the type of activity, results, recommendations and analysis;
- A report every four (4) weeks on analysis of data as to fraud detection, outlier trends and progress by agencies or contractors to correct anomalies and system processes to provide verification of resolution and prevention of reoccurrence; and
- Monthly reports on the resolution of issues identified as a result of audit or monitoring from agencies providing oversight.

### **2.3.3 Reporting and Documentation**

The Addx Team will provide and submit to the Using Agency and the State Contract Manager all reports and documents necessary to document services provided including, but not limited to, auditing, compliance, integrity monitoring, oversight and fraud detection and prevention, in accordance with Federal HUD, FEMA



and State requirements. Any final audit reports submitted by the contractor to a Using Agency shall be certified by a New Jersey Certified Public Accountant (CPA) employed by the contractor.

Addx shall retain all records, documents, and communications (including electronic in disk or print form) that relate to the award and performance of this Contract as required by State and Federal regulations.

We will maintain all records related to products, transactions or services under this contract for a minimum period of five years from the date of final payment. Such records shall be made available to the New Jersey Office of the Comptroller, for audit and review, upon request pursuant to N.J.A.C. 17:44-2.2 and disclose to other parties for audit and review. Record retention beyond the five- year mark may be necessary and will be directed by the State. The Addx Team be responsible for providing protective storage of daily or disaster-related documents and reports used during the provision of services under this RFQ, including but not limited to, audit, compliance, integrity monitoring, oversight and fraud detection and prevention and shall make any documents available to the State upon request.

### **2.3.4 Litigation Services**

The Addx Team understands that, at our own cost, we will fully cooperate with the State of New Jersey providing any and all documentation and/or working papers necessary to support the State of New Jersey's legal defense. This includes any State of New Jersey political sub-divisions, in any matter before any federal, state or local regulatory agency if any agency files a proceeding against the State or any of its political sub-divisions, and the basis for the proceeding is a result from the implementation of a recommendation made by the Addx Team. In this event, the Addx Team will make our staff, and documentation related to services (i.e. notes, work papers, etc.), available to the State of New Jersey. It is our understanding though that all legal support and respective legal labor costs will be the responsibility and paid for by the State of New Jersey. Addx Corporation is not then held responsible for providing or supplying funding for, legal representation or defense of the State or any of its political subdivisions at its own cost.

### **2.3.5 Travel Expenses and Reimbursements**

The Contractor agrees to adhere to the General Services Administration (GSA) published travel rules and rates to include disaster specific amendments in accordance with the Federal Travel Regulations.

Reimbursable expenses shall be limited to the following:

- Coach class air fare purchased at the lowest reasonably available rate and baggage fees, to include consultant deployment and demobilization travel;
- Meals limited to the maximum current GSA per diem rate (receipts not required but will be supplied if HUD or other funding agencies require same);
- Lodging limited to the maximum current GSA per diem rate to include GSA- or HUD approved lodging waivers;
- Rotation airfare for consultant employees or approved sub-consultants/subcontractors will be reimbursed based on the consultant travel policy which limits each individual to a maximum of one (1) extended weekend trip every two (2) weeks, with up to one (1) trip up every quarter being a trip that can extend up to a week in duration; coach class air fare purchased at the lowest reasonably available rate plus baggage fees. Additional rotations or extensions of rotation duration may also be allowed outside of this rotation policy if deemed cost-effective or for client-recognized holidays, as long as they are approved by the State; and
- Mileage for Contractor privately owned vehicles at the current New Jersey rate of 31 cents per mile.

## 2.4 Level of Effort

New Jersey is eager to rebuild its shoreline as well as the inland communities that have suffered so much loss in the wake of Hurricane Sandy. It needs a partner that can move swiftly in support of the State's efforts to help residents of these stricken areas return to a normal way of life. The Addx Team stands ready to move forward on Day One of the Contract and work effectively and consistently until the State completes this restorative mission.

Our Team consists of partners that share the requisite experience and complementary skill sets to support the State's forensic accounting requirements. Already, we are working together to ensure that resources are in place to aid New Jersey upon the issuance of the first Task Order.

## 2.5 Realistic, Attainable, and Appropriate Plans

Upon BPA award, we will have our PMO (and supporting functions) ready to support BPA calls issued by the State. As BPA calls are awarded, we will assess the level of effort required at the task level and staff the task appropriately. To do this, we will leverage our existing staff, engage staff from our partners and subcontractors, and (if necessary) quickly recruit and hire the needed professionals to support the State's needs.

The Addx Team's approach to carrying out this work is informed by our track record of successfully completing projects of similar scope and size. Our overall Project Management Plan includes an Integrated Master Schedule that will incorporate task order-level project plans. Such plans include information on the responsible individuals, intermediate milestones, and dependencies (such as customer review of deliverables). As a result, our work plans focus on measurable objectives, and clearly enumerate the steps required to reach them.

## 3.0 Contract Management

We use a comprehensive project management approach that is composed of a set of phases, activities, and tasks that define a project. We employ conventional automated project management tools for schedule, delivery, ordering, and financial management. The Addx Team will ensure clear and responsive communications internally, with our site representatives, and, most importantly, with all appropriate levels of New Jersey stakeholders.

Upon award, Addx will rapidly set up a Program Management Office (PMO) that will effectively carry out the requirements of the BPA: responding to task orders (TOs), staffing TOs as they are awarded, and providing overall management and oversight (both at the BPA level and at the TO level).

**Establish PMO:** One of our PMO's first priorities will be to establish a Task Order Response Center (at no direct cost to the Government) that enables us to respond immediately to any State TO requests. Addx's experience in proposal development makes us well-qualified for this aspect of the program. We can respond rapidly; comply with complex Government requirements; and produce reliable, well-documented cost and schedule estimates.

**Staffing:** As TOs are released and awarded, we will staff them with qualified, readily available personnel. In addition to our internal resources and those of our teammates, we are partnering with staffing agencies that allow us access to tens of thousands of prescreened candidates.

**Management:** We manage our projects in accordance with industry best practices such as the Project Management Institute's Project Management Body of Knowledge (PMI PMBOK). Our past performance (detailed in section 4) demonstrates that we consistently deliver high-quality services and deliverables to our clients, resulting in high customer satisfaction and frequent repeat business.

**Task Execution:** With our PMO infrastructure and TO-level staff in place, we will effectively execute and manage any and all TOs awarded to us. Our management procedures are informed by lessons learned from our work in the private and public sectors as well as by industry best practices. Well-defined and repeatable PMBOK-driven processes enable us to provide high quality services; ensure schedule, cost, and risk control; and deliver high customer satisfaction. Finally, our PMO and TO managers will be able to call upon all our Team's corporate resources as necessary to meet the State's requirements.

Upon contract award, Addx will prepare and conduct a kickoff meeting between the State personnel, our Program Manager, assigned Project Manager(s), and the appropriate Addx/subcontractor personnel. Due to the potentially aggressive timeline of the initial phase of this contract, the meeting will focus on ensuring a quick start to review activities. This may entail arranging badging, clearances, work space, travel, and other logistics. Each Senior Consultant assigned to this effort will oversee task execution in his or her respective task area. Our PM will oversee all work performed on this contract.

Addx will develop a detailed project plan (using MS Project) for every project. The project plan will describe how we will carry out the task, which task lead(s) will be responsible for the project, milestones, tracking procedures, other activities (including reports), risk mitigation plans, and procedures for receiving and returning contract files.

Addx will conduct the integrity monitoring and antifraud in close alignment with the states and agencies to facilitate the ongoing need to monitor the activities. We monitor the process from the initial request of the grantees in those affected areas to when the funds are dispersed, ensuring proper use of the funds.

### **3.1 Managing, Controlling, and Supervising Task Orders**

Addx brings a structured, disciplined program management approach that is built around Capability Maturity Model Integration (CMMI) and other industry best practices (e.g., Project Management Institute's Management Body of Knowledge [PMBOK], ISO 9000). While these methodologies form the foundation of our approach, we adapt to the needs and the specific requirements of our clients to deliver responsive customer service and ensure high-quality services and deliverables.

The overall management plan is the framework to provide a clear roadmap to lay out the overall program level management overseeing the business strategies to carry out the plan to meet the program objectives. The monitoring of program execution and performance ensures that grantor agencies use appropriated funds in an efficient and appropriate way.

All measures will be taken to monitor the shipment and supplies, their documentation and tracking in the accounting system, and clear reconciliation of the records and a records keeping system or database. This minimizes and prevents fraud, waste abuse and mismanagement of funds. We will establish a watch and hotline so that fraud or abuse can be reported.



### 3.2 Communication

Clear lines of communication, authority, and escalation will ensure smooth performance on this effort. At the BPA level, Our PM will be the principal point of contact for the State’s leadership. Each task order will have a project manager assigned, so that the appropriate manager from the State will have a dedicated point of contact. The project managers and his or her team will work collectively to assist the states with the recovery efforts and monitor and investigate the activities of issuance of the funds and how it’s utilized and properly handled. As such Addx will monitor these activities very closely to ensure that they are used properly and in accordance with the state and federal regulations.

*Our communications will include all required reports (per the RFQ) as well as regular phone, email, and in-person contact.*

During the execution of the contract, we seek feedback and comments and incorporate comments into our Monthly Status Reviews, which provide a summary level illustration of the activities and progress made on the contract and the resolution of the issues depicted in the Monthly Status Reports, which focus on program and staff performance and key issues. We want to know how we are performing. The Monthly Status Report will outline the specifics of the closure on the critical issues and the result of the action plan and provide the monitoring agencies with the information and oversight.

## 4.0 Organizational Support and Experience

The Addx Team provides anti-fraud services, including investigation, analytics, audits and predictive analysis. Our areas of expertise include: identifying current schemes within the program; identifying current perpetrators within the program; identifying emerging schemes targeting the program; identifying perpetrators targeting the program; identifying organized criminal groups targeting the program; and identifying organized criminal groups conducting fraud schemes within the program.

The Addx Team has supported contracts of similar size, complexity, and requirements. For example, under contract with the Veterans Administration, Addx provides investigative services to the Center for Veterans Enterprise (CVE) to determine the eligibility of companies to receive status as verified Veteran Owned Small Business (VOSB) and Service-Disabled Veteran Owned Small Businesses (SDVOSB) for the purpose of specially designated set-aside Federal contract procurements. This is directly comparable to the State of New Jersey’s effort to ensure that expenditures for disaster relief are actually reaching the people who truly need them. When contractors misuse these set asides, they directly harm those who need them – just as misusing disaster relief funds directly harms those most affected by Hurricane Sandy.

Addx is also running the first VA-wide implementation of a subcontracting and compliance review program, helping the VA to identify fraud, waste, and abuse. Addx conducts compliance reviews on-site and off-site to monitor VA contractors’ compliance with work performance requirements, subcontracting commitments, and subcontracting plans to ensure that they are performing in accordance set-aside clauses and subcontracting commitments and plans incorporated into their contracts. These reviews included assessing contractual and financial documents to ensure compliance with work percentage requirements.

**Figure X** contains the primary references for our sited relevant past experience:

Department of Veterans Affairs – On-Site Examination Services (Addx)	
<b>Government Agency/Organization:</b> U.S. Department of Veterans Affairs Center for Veterans Enterprise (CVE)	<b>Contracting Officer’s Representative:</b> Name: <span style="background-color: gray; color: black;">[REDACTED]</span> Phone: <span style="background-color: gray; color: black;">[REDACTED]</span>
Department of Veterans Affairs – Subcontractor Compliance Reviews (Addx)	
<b>Government Agency/Organization:</b>	<b>Contracting Officer’s Representative:</b>



U.S. Department of Veterans Affairs Center for Veterans Enterprise (CVE)	Name: [REDACTED] Phone: [REDACTED]
<b>Government Agency/Organization:</b> Medicare Parts A, B, C, DME, Homes Health and Hospice	<b>MS Chief Operating Officer</b> Name: [REDACTED] Phone: [REDACTED]

Figure 4: Primary Addx Team References

## 4.1 Organization Chart



The Addx Team has developed a comprehensive and efficient organizational structure that is tailored according to the directives of the solicitation to ensure maximum effectiveness. Addx Director of Forensic Investigative Services, [REDACTED] will act as Partner/Principal and Program Manager. [REDACTED] will be the single point of contact for the State of New Jersey and will directly manage this contract. He will have oversight over all Project Managers including subcontractors.

Addx Project Manager [REDACTED] reports to the PM. [REDACTED] will manage the day-to-day allocation of resources –time, money, people and materials – and ensure the quality and timeliness of deliverables. He will also oversee the Senior Consultants, who act as the highest level of field staff, giving direction, training, and occasional on-site guidance to the Associate/Staff. The Associate/Staff are our onsite examiners performing the bulk of the anti-fraud work.

All members of the Addx Team can tap the expertise of our Subject Matter Experts (SMEs) as needed while receiving support from Administrative Support Staff, who ensure access to documents and the portal and provide all required clerical duties.

## 4.2 Staff Experience

Figure 6 shows Staff the Addx Team has already identified for this project, along with their experience and an indication of which staff has been provided as part of the key resumes.

Name	Labor Category	Years Experience	Benefit to NJ
(Addx)	Principal/Partner/ Director/Program Manager	27	SME in program management, strategy development and planning, budgetary and financial guidance on government contracts. Received numerous awards for expertise in the fields of procurement fraud, bribery, embezzlement, and financial accounting fraud
(Addx)	Project Manager	13	PMP Certified, over 10 years of experience in resource leadership organizing, planning, and executing complex tasks
(Addx)	Subject Matter Expert	25	Highly experienced Certified Fraud Examiner (CFE), Certified Public Accountant (CPA), former federal agent for HUD, Department of Treasury, ATF, and the FBI
(Addx)	Subject Matter Expert	29	Former federal agent for NCIS specializing in crimes against persons, property, procurement fraud, counter-terrorism, force protection, protective services
(Addx)	Senior Consultant	34	Highly experienced SME, former federal agent for USMC, NCIS, USPS, CBP, and the Department of Treasury
(Addx)	Consultant	30	Highly experienced SME, Certified Fraud Specialist (ACFS), former federal agent for USMC, NCIS, USPS, and CBP
(Addx)	Associate Staff	25	Certified Forensic Accountant (CrFA) with extensive experience investigating complex criminal and civil investigations
(Addx)	Administrative Support Staff	3	Corporate ISO 9001:2008 Auditor, specially trained to interface with corporate clientele and to deliver business process improvement services
(CES)	Project Manager/ Subject Matter Expert/ Senior Consultant	35	Former FBI Senior Executive Service lead fraud investigations unit. Served the National Joint Terrorism Task Force (NJTTF) as Unit Chief
(CES)	Project Manager/ Subject Matter Expert/ Senior Consultant	20	Developed Anti-Fraud program at CMS which uncovered hundreds of millions of fraudulent billings
(BroadSpec)	Project Manager/ Subject Matter Expert/ Senior Consultant	28	Certified Building Official, ICC/IBO, Certified Building Inspector, ICC/IBO. As President of Broad Spec Inc., provides oversight, compliance and contract management for government clients
BroadSpec)	Project Manager/ Subject Matter Expert/ Senior Consultant	20	Experienced Civil Engineer in both the public and private sector. Manages engineers and inspectors to evaluate disasters, individual assessments, and provides for the remediation.

**Figure 6: Experience of Key Personnel**

Additionally, Addx Corporation has identified [REDACTED] for our State of New Jersey registered CPA,



## 5.0 Resumes

Resumes for key personnel indicated in **Figure 6** are provided in Appendix A. As required by section 4.5 of the solicitation, the relevance section of the resumes highlight up to three previous positions that are the most highly relevant previous projects each key person has worked on, along with the required reference for that project.

## 6.0 Experience on Similar Contracts

Our Team’s experience in sanctions support can provide unparalleled insight and yield improved effectiveness into sanctions and designations programs. We possess deep experience with both interagency and cooperative collaboration with state/local law enforcement and understand that this interaction is necessary for success. Our work at the Department of Veterans Affairs is designed to aid in integrity and fraud investigation and enforcement. Our national presence, deep financial expertise, and deep understanding of New Jersey’s mission ensure that we can help with its stated goal of monitoring the appropriate use of designated disaster relief funds. Team Member CES is providing similar services to The National Benefit Integrity MEDIC as well as MEDICARE Zone 4.

### 6.1.1 Department of Veterans Affairs – On-site Examination Services

#### On-Site Examination Services

<b>Contracting Officer’s Representative:</b> Name: <span style="background-color: gray; color: gray;">[REDACTED]</span> Phone: <span style="background-color: gray; color: gray;">[REDACTED]</span> Email: <span style="background-color: gray; color: gray;">[REDACTED]</span>	
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**Period of Performance:** September 27, 2010 - September 26, 2013

#### Description of the Project

The Department of Veterans Affairs (VA) Center for Veterans Enterprise (CVE) promotes business ownership and expansion for Veterans and service-connected disabled Veterans to increase participation in the Federal marketplace with emphasis on VA work opportunities. A key component to increase participation is CVE’s Verification program. Addx examiners perform on-site examinations of Service Disabled Veteran Owned Small Businesses (SDVOSBs) seeking entrance into the VA’s Veterans First Contracting Program. These on-site examinations include a detailed examination of official business records and corporate operations, on-site interviews, and an evaluation of the subject’s business property; ensuring boundaries and areas are consistent and documented. These evaluations and the resultant data provide the input needed to assist in the overall decision and rating of the subject business by the CVE. Our examiners are extremely qualified and utilize an understanding of economic theories, business information, financial reporting systems, accounting and auditing standards and procedures, data management & electronic discovery, evidence gathering and investigative techniques, and litigation processes and procedures to perform their work. To date, our staff has conducted over 1,500 site visit examinations and has increased the overall identification of ineligible SDVOSBs from 3-5% to an alarming rate of overall 42%. The Addx Team has continuously provided updated guidance and information relative to improvement of the site visit process and its processes. Our Forensic Examiners are continuing to evolve in terms of utilizing technology to assist in engagements to identify anomalies and inconsistencies while tracing relative assets and data. The program is now nationally recognized. In addition and as a result of these efforts, we provide valuable insight to the House VA Committee (HVAC) with overall positive results.

#### Contract Relevance

Addx examiners perform on-site examinations of Service Disabled Veteran Owned Small Businesses (SDVOSBs) seeking entrance into the VA’s Veterans First Contracting Program. These on-site examinations include a detailed review of official business records and corporate operations, on-site interviews, and an evaluation of the subject’s business property; ensuring boundaries and areas are consistent and documented. These evaluations and the resultant data provide the input needed to assist in the overall decision and rating of the subject business by the CVE.

For each examination, our examiners review all documentation supporting VA Form 0877. Based on the evidence, Addx determines whether veterans control the company and manage the company on a day-to-day basis. Upon completion, our examiners submit a written Site Visit Report recommending whether the company be verified as a Veteran Owned Small



**On-Site Examination Services**

Business (VOSB), Service Disabled Veteran Owned Small Business (SDVOSB), or denied verification.

Our examiners are extremely qualified performing business and/or financial law enforcement investigations. To date, our staff has conducted over 1,450 site visit examinations and has increased the overall identification of ineligible SDVOSB’s from 3-5% to an alarming rate of overall 42%. The Addx Team has continuously provided updated guidance and information relative to improvement of the site visit process and its processes. The program is now nationally recognized. In addition and as a result of these efforts, we are providing valuable insight to the House VA Committee (HVAC) with overall positive results.

Addx provides both program and project management support in providing Verification On-site Examination Services through this task order contract. Addx routinely works with the CO and COTR to define work plans, schedule on-site verification visits, define schedule milestones and resource requirements, and develop site visit reports detailing findings of each review, compliance scoring recommendations and recommendations for follow-up. Through these reviews, Addx works with CVE to define compliance requirements and builds review plans designed to determine applicant companies’ adherence to those requirements. These reviews are metrics analyses that provide insight into each reviewed company’s structure relative to being certified as either Service Disabled or Veteran-Owned Small Business. Addx drafts reports for each review performed. Each report details the company reviewed, record reviewed, findings, and a verification recommendation. All reports are reviewed internally for accuracy, completeness, adherence to reporting requirements, and presentation quality before customer delivery.

Addx developed, implemented and maintains detailed documentation for all reviews performed for this program. This documentation, in the form of audit reports, is filed and can be cross-referenced by date performed and verification recommendation. Addx maintains version control and configuration quality for all reports. Configuration quality includes both report presentation and inventory management. We maintain a very strict audit trail to ensure accountability of all documentation as these reports are drafted, reviewed, filed, and later referenced to support program reporting requirements.

Through an integrated program that requires coordination of reviews schedule, staff, and tools (configured laptop computers), Addx has performed nearly 1,450 site visit review since program inception in September 2010. Schedule currency and accuracy are critical to efficient program management. The site visit schedule is available to all stakeholders in real-time and offers both the plan for future program support and a history of all previously completed program milestones. Program resourcing scheduling follows a WBS that defines the structure of each review team, projected audit duration (based on size of company being reviewed), and resource assignments

The Verification Site Visit program is designed to offer protections to firms undergoing a review. Addx manages this initiative through an Integrated Project Plan that includes risk identification and mitigation strategies. With this understanding, Addx initiated its planning cycle, focusing on addressing potential program risks such as (but not limited to):

- The inadvertent disclosure of an applicant’s proprietary information;
- Information security and control;
- Potential throughput constraints during the transition period from the current service provider to Addx and during the transition from the current state Verification process to the desired process; and
- Specific quality control issues such as incomplete applications or incomplete applicant information.

The Addx Program Manager provides CVE with a monthly report of all examinations performed and indicates all points of interest relevant to the examinations. Addx has a designated staffer on-site at CVE to work with them to improve their processing of applications. The on-site staffer goes through all new application records provided by the government and assigns them to an Addx examiner. This close working relationship allows Addx to increase the number of examinations performed.

At the beginning of the contract, Addx field examiners had difficulty securely accessing the relevant information needed to conduct an on-site investigation. Addx provided counsel system integration in regards to maintaining and adhering to Privacy Act related regulations. Through this process, CVE was able to establish a secure virtual private network (VPN) that cleared individuals could access remotely. With this capability in hand, the number of field examinations an examiner could conduct increased from a few investigations a week to multiple investigations per week, without a loss of quality.

**6.1.2 Department of Veterans Affairs – Subcontracting Compliance Reviews**

**Subcontractor Compliance Reviews**

**Point of Contact:**

Name:   
 Phone:   
 Email:

**Point of Contact:**



## **Subcontractor Compliance Reviews**

**Period of Performance:** April 20, 2011 – April 19, 2016

### **Description of the Project**

As part of the Veterans Benefits, Health Care, and Information Technology Act of 2006, legislation was enacted to enable the Department of Veterans Affairs to implement a “veterans first” approach to VA-specific contracting. This new legislation authorized a special contracting authority to set aside contracts for Service-Disabled Veteran-Owned Small Businesses (SDVOSB) and Veteran-Owned Small Businesses (VOSB) on either a sole source or a competitive basis. The Veterans First Contracting Program permits VA contracting officers to give special consideration to teams that include SDVOSB and VOSB as subcontractors on full and open competitive bids. Addx conducts VA Subcontractor Compliance Reviews in support of VA Center for Acquisition Innovation, evaluating whether small businesses, are performing the required percentage of work as specified in the subcontracting or set-aside criteria, and whether large companies are meeting their stated subcontractor commitments.

### **Contract Relevance**

**Addx conducts VA Subcontractor Compliance Reviews in support of VA Center for Acquisition Innovation, evaluating whether small businesses, are performing the required percentage of work as specified in the subcontracting or set-aside criteria, and whether large companies are meeting their stated subcontractor commitments.**

#### **Conduct Limitations on Subcontracting Compliance Review (LSCR)**

Addx conducts LSCRs as outlined in Chapters 2 and 3 of the Subcontracting Compliance Review Program (SCR) manual to determine whether small business concerns, including SDVOSBs and VOSBs, are performing the required percentage of work as specified in the limitations on subcontracting or set-aside criteria. Based on the criteria and associated activities as defined in the SCR manual, we perform contractual reviews as a means to identify the limitations on subcontracting or set-aside clauses in the contract. Our examinations include comparative analysis of both the prime contractor and the subcontractor’s financial and accounting business records, including payroll records. Other documents that are examined include a review of invoices, job cost ledgers, accounts payable ledgers from the prime contractor as well as the accounts receivable ledger of the subcontractor, a review of cancelled checks as well as banking records to ensure that payments have not exchanged hands after initial payments were made. Interviews are conducted to identify discrepancies and confirm their role on any contract in question.

For each review, Addx examiners evaluate the percentage of work performed by employees of the small business prime contractors and any subcontractors on the contract. These reviews ensure that the costs formula used in determining how the percentage of work was calculated is clearly documented and included as an appendix or attachment to the compliance review report. Addx’s examiners also evaluate the percentage of work performed by employees of the small business prime contractors and any subcontractors on the contract. These reviews are conducted at both prime and subcontractor locations. Upon completion of an on-site evaluation, Addx examiners prepare a review report, conduct a detailed internal quality control review of the report, and submit the report to the COTR for inspection and acceptance.

#### **Conduct Subcontracting Commitments Compliance Reviews (SCCR)**

When conducting a SCCR, Addx examiners review the contractor’s subcontracting plan and related reports. Interviews of company personnel are conducted as a means to substantiate whether all information was submitted into the Electronic Subcontracting Reporting system (ESRS) for the current contract. These interviews assist in determining whether the company is meeting their goals; what programs the company has instituted to increase its small business participation; and whether the contractor’s subcontracting goal to each small business subgroup has been increasing, decreasing, or remaining stable over the last five years.

To determine whether contractors, regardless of status, are complying with their subcontracting commitments included in their contracts, Addx examiners review contractors’ subcontracting commitments included in the contract and examine the contractor’s initiatives and efforts undertaken to meet the subcontracting commitments in the contract. Our examiners identify the overall percentages of subcontracts identified in the subcontracting plan compared to that of the actual contract amounts. This information is documented and a report is submitted to VA for further action as necessary.

#### **Conduct Subcontracting Plan Compliance Reviews (SPCR)**

Following the procedures stated in chapters 2 and 3 of the SCR manual, our examiners review the prime subcontracting plan incorporated in the overall contract to identify all subcontractors and contract amounts. When substitutions of subcontractors are identified, the substitution is noted and our examiners then verify that the subcontractor is verified as an acceptable SDVOSB or small business concern. VOSB concerns are included in their contracts by virtue of VAAR clause 852.215-71. Addx examiners conduct interviews with contractor representatives responsible for the contractor’s subcontracting program.

Addx examiners are trained in interview methods and know how to solicit information relative to developing, preparing, and



**Subcontractor Compliance Reviews**

executing subcontracting plans; monitoring performance relative to the requirements of the subcontracting plans; how the company formulates these plans; and how to ensure compliance with applicable rules and regulations while promoting the program. Addx examiners focus on an assessment of management’s support of their subcontracting program. Through this process, we can identify their familiarity with the program and their knowledge of the requirements. In addition, Addx examiners conduct an assessment of a contractor’s willingness to develop and promote company-wide policy initiatives that demonstrate the company's support for awarding contracts and subcontracts to small and small disadvantaged business concerns and ensure that small and small disadvantaged businesses are included on the source lists for solicitations for products and services they are capable of providing.

Our analyses identify the method used to develop the subcontracting goals for small and small disadvantaged business concerns. Our reports explain the method and state the quantitative basis (in dollars) used to establish the percentage goals. Our examiners also look at how the areas to be subcontracted to small and small disadvantage business concerns were determined and how the capabilities of small and small disadvantaged businesses were determined, to include any source lists used in the determination. The examiners evaluate records to support outreach efforts with small business trade associations, attendance at small and minority business procurement conferences and trade fairs. We also evaluate records to support internal guidance and encouragement provided to buyers through (1) workshops, seminars, training programs, incentive awards; and (2) monitoring activities to evaluate compliance with the prime contractor’s program. This information is documented and a report is submitted to VA for further action as necessary.

**Follow-up Compliance Reviews**

Occasionally follow-up reviews need to be conducted to determine if the contractor has taken corrective actions and implemented recommendations regarding previously identified deficiencies. These follow-up reviews are initiated following any review where the initial review resulted in a rating of “Fail” in the case of LSCRs and SCCRs, or a rating of “Marginal” or “Unacceptable” in the case of SPCRs. As part of the follow-up review, Addx examiners review the contractors’ corrective action and determine its validity. If compliant, a draft compliance checklist is submitted to the COTR for further action.

**6.1.3 Zone Program Integrity Contractor- Zone 4**

**Zone Program Integrity Contractor- Zone 4**

**Point of Contact:**

**Name:** [Redacted]  
**Phone:** [Redacted]

**Point of Contact:**

**Name:** [Redacted]  
**Phone:** [Redacted]

**Period of Performance:** September 30, 2008- Present

**Description of the Project**

The ZPIC IDIQ Contract provides oversight, audit, and anti-fraud, waste, and abuse services related to Medicare Parts A, B, C, DME, Homes Health and Hospice for: TX, NM, OK, CO. Additionally, three of the four Zone 4 state have agreed to participate in the Medi-Medi Program (e.g., a comparative evaluation of Medicare v. Medicaid claims for services for the same beneficiaries). CES’s efforts include the following tasks: Performing Proactive Analysis, Data Analysis and Data Mining, Conducting Medical Reviews Related to Benefit Integrity Investigations, Supporting Law Enforcement for Answering Complaints and Providing Supportive Claim Data on Providers and Beneficiaries, Investigating Fraud and Abuse, Recommending Recovery and Federal Funds Through Administrative Action, Pre-Payment Edits, and Revocation, and finally, Refer Cases to Law Enforcement Participate in ALJ Hearings as needed.

**Contract Relevance**

CES uses its pool of investigators to identify, investigate, and refer suspected cases of fraud, waste, and abuse to law enforcement. CES’s investigations utilize multiple intelligence channels and methods to perform their functions under the contracts including a fusion center approach, a rapid response team, and experienced personnel.

CES recruits, trains and supervises all our personnel who work on the ZPIC4 Contract. CES provides program management; subject matter experts; research, analytical and intelligence support; criminal investigative services; briefing papers and case debriefs for CMS officials; and specialized presentations during investigative training conferences. Our Program Manager conducts regular liaison with the prime contractor to monitor the performance of our personnel under the contract and ensure any issues that arise are resolved in a timely manner.

**6.2 Additional Experience**

Even though Addx does not hold direct experience dealing with FEMA in the aftermath of a major catastrophic event, Addx does have experience in preparation for expected catastrophic events as detailed in the Army Corps of Engineers contract. Addx does hold experience with FEMA through an existing

subcontract to provide Equal Employment and Opportunity complaint processing services to investigate claims of discrimination. The proposed Project Manager, [REDACTED] was strategically involved in the award and implementation of the FEMA EEO Investigations contract, as well as the establishment of the current Addx subcontract. [REDACTED] worked alongside FEMA agency personnel to coordinate the programs integration and understands the agencies mission for supporting citizens and first responders to ensure that as a nation we work together to build, sustain, and improve our capability to prepare for, protect against, respond to, recover from, and mitigate all hazards.

BroadSpec's staff of [REDACTED] [REDACTED] have extensive experience in supporting FEMA in responding to disaster recovery efforts. BroadSpec staff reported to New Orleans following hurricane Katrina providing technical oversight with regards to building codes and safety. Their staff also supported FEMA reporting to the San Francisco Bay following the Loma Prieta Earthquake to aid in building inspections and damage assessments. Additionally, BroadSpec staff provided technical support for post disaster property assessments, in conjunction with mutual aid agreements between local municipalities.

CES has established relationships with CMS, which administers the Medicare and Medicaid programs, and with individual states which administer the state Medicaid programs. They have been recognized by CMS for their efforts in spearheading working groups with police, prosecutors, task forces, private insurance plans and CMS on the ZPIC and MEDIC contracts. Their liaison efforts have identified emerging fraud schemes and criminal organizations, enhancing fraud prevention efforts, the recovery of [REDACTED] [REDACTED]

In early 2009, President Obama announced a program to jump-start the development of high-speed rail corridors connecting major U.S. cities. The new program, The High-Speed Intercity Passenger Rail (HSIPR) Program, administered by the Federal Railroad Administration (FRA), was to be funded under the auspices of the American Recovery and Reinvestment Act (ARRA), with an initial set-aside of \$8 billion in funding. Following the announcement, FRA's Office of Passenger and Freight Programs (RDP-10) solicited applicants for HSIPR Program funding. The solicitation response was overwhelming; over 239 pre-application forms from 37 states and the District of Columbia were received for a total of \$57 billion in requests. In January 2010, President Obama announced the first recipients of program funding. Seventy nine (79) applications from 31 States were selected for funding. The tremendous response far exceeded the original set aside of \$8 billion in funding and flooded the FRA personnel infrastructure. In order to address the substantial workload increases and oversight capabilities, the FRA solicited bids for technical advisory and acquisition planning support services to assist RDP-10 with post-award Project Management Oversight (P.M.O.) acquisition. Addx was tasked with providing technical advisory and acquisition planning support services for RPD-10 with the end result of acquiring a high-performance P.M.O. consultant to successfully help FRA and RDP-10 achieve its outcomes on HSIPR and other passenger rail projects.

### **6.3 Disclosure**

None of the members of the Addx Team have any current or past business relationships with the contractor providing service on State Contract G-8034 Consulting: Disaster Recovery, G-8037 Housing Strategy Advisor or any other consultant providing consulting services on disaster recovery services.

### **6.4 Financial Capability**

Our last two years of financial statements and bank reference have been included in **Appendix B**.



## Appendix A Key Resumes

### A.1. Partner/Principal

	<b>Addx Corporation</b>
Partner/Principal/Director/Program Manager	

#### Demonstrated Experience

██████████ has more than 20 years of experience as Subject Matter Expert in the areas of facilitation, project management, strategy development & planning, budgetary & financial guidance on government contracts, Federal Acquisitions Regulations (FAR), contract specification reviews, audit and investigative litigation support, internal and financial fraud investigations, damage analysis, post-acquisition disputes, internal audits, and forensic accounting oversight. HE is a DHS certified course instructor and developer.

██████████ is a highly accomplished Program Manager able to serve as qualified subject matter resource who has extensive expertise in the world of procurement fraud and has received numerous awards for his expertise in the fields of procurement fraud, bribery, embezzlement, Financial Accounting Fraud (NASDAQ Fraud), environmental, product substitution, anti-trust violations, larceny and theft of Government property. ██████████

██████████ was recognized by Department of Defense (DoD) Inspector General for his investigative efforts of numerous high profile criminal and civil convictions which also resulted in debarments covering a spectrum of the various types of cases identified above. ██████████ Addx’s Director of Compliance and Forensic Investigations, is further highly regarded for his knowledge of the Federal criminal, civil, and administrative processes and was often requested by the U.S. Attorney’s Office for his assistance on investigations because of their high regard for his abilities and knowledge. He has also been sought out to instruct Special Agent, Attorney’s, and Auditor’s of other Government agencies on the aspects of the Procurement investigative process as it relates to criminal investigations as well as the Civil False Claims Act.

██████████ has been involved in many investigations and examinations that have been coordinated with the U.S. Attorney’s Office or appropriate authorities. This coordination and assistance has included Grand Juries, trials, and hearings. He has knowledge of the Federal rules and criminal procedures for both criminal and civil litigation processes, to include indictments, information’s, convictions, sentencing, search warrants, Rule 20, arrest, fines, restitution, pre-trial diversions, venue, Statue of limitations, as well as suspension and debarment proceedings; all of which were covered under the U.S. Criminal Code, Title(s) 18 or 31.

██████████ is currently the lead Subject Matter Expert & Auditor supporting the VA CVE (Center for Veterans Enterprise) office to review and report on compliance with SDVOSB verification as defined in Public Law and the Code of Federal Regulations. He is an expert for the business side of program management strategy, enterprise portfolio management, capital planning, acquisition, marketing and communication, and performance improvement. ██████████ further provides guidance to federal agencies; provides highly useful compliance and reengineering reports and has a broad understanding of GAO and regulatory compliance requirements. In addition, he assists with Capture Management and writing of Cost Proposals. In essence, ██████████ successfully oversees programs to ensure that activities conducted in accordance with established specifications, schedules, and budgets; coordinates interdepartmental functions in order to minimize delays; meets with program team members on a regular basis to review program status and plan future actions.

**Core Competencies** - Management experience; In-depth knowledge of FAR; Litigation Support; DCAA experience & visibility; Fraud Screening & Assessments; Qui Tams / False Claims Act; Government contracting; Contractor Reviews; Internal & External Investigations; Cost Valuation; Audit / Investigative plan knowledge; Internal Control Reviews; Internal audits; Compliance audits; Contract Performance Reviews

#### Education & Training

- B.S., Accounting, Frostburg State University, Frostburg, MD
- Member – Association of Certified Fraud Examiners.
- Federal Law Enforcement Training Ceneter (FLETC)
- Defense Contract Audit Institute (DCAI)

#### Experience with Similar Contracts



	<b>Addx Corporation</b>
<b>Addx Corporation Program Manager</b>	<b>2009 – Present</b>

\_\_\_\_\_ currently serves as the Director of Addx’s Compliance and Forensic Investigations Division. He also serves as a Subject Matter Expert (SME) on a highly visible Veteran’s Affairs program regarding Veteran owned companies. The program utilizes verification techniques. He facilitated, managed, developed, and coordinated all aspects of reengineered Veteran Affairs business verification process. His responsibilities included, but were not limited to, facilitating meetings to develop plans and supporting milestones for team delivery of program documents, prioritizing change requests (CRs); reviewed issues and risks; reviewed or current project status, etc. \_\_\_\_\_ was responsible for management and development of the creation, tracking and implementation of approved CRs and re-development of the verification program. He has experience in creating Work Breakdown Structures; Highly motivated, result-oriented management professional with extensive management experience providing services to government sector clients; Accomplished in guiding development teams to successful completion of projects; and has a thorough knowledge of contracting regulations and its processes. \_\_\_\_\_ is very detail oriented with proficient computer operation skills and is a self-starter with exceptional tasking skills. He is also currently the Lead Subject Matter Expert & auditor supporting the VA CVE (Center for Veterans Enterprise) office to review and report on compliance with SDVOSB certifications as defined in Public Law.

\_\_\_\_\_ also serves as the Program Manager coordinating and overseeing a highly visible program with Veterans Affairs regarding Limitations on Subcontracting. His program responsibilities include reviewing contractor’s books and ledgers to ensure compliance with VA regulations.

\_\_\_\_\_ is an expert for the business side of program management strategy, enterprise portfolio management, capital planning, acquisition, marketing and communication, and performance improvement. He provides guidance to federal agencies; provides highly useful compliance and reengineering reports and has a broad understanding of GAO and regulatory compliance requirements. He further assists with Capture Management and writing of Cost Proposals.

Mr. Armstrong oversees programs to ensure that activities are conducted in accordance with established specifications, schedules, and budgets; and further coordinates interdepartmental functions in order to minimize delays; meets with program team members on a regular basis to review program status and plan future actions.

**Key Achievements:**

- Provided early delivery of product due to user’s needs
- Recognized by client as Subject Matter Expert on agency Verification programs

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
_____	Owner – Addx Corporation	4900 Seminary Ave. #570 Alexandria, VA 22311	_____

<b>US Treasury Inspector General for Tax Administration</b>	<b>2004-2008</b>
<b>Supervisory Criminal Investigator/Assistant Special Agent in Charge</b>	

\_\_\_\_\_ managed specialized Procurement Unit overseeing critical mission involving criminal, civil, and administrative investigations related to government contractors. Oversight involved government contracting, procurement, FAR, white-collar fraud, embezzlement, theft, and internal employee misconduct. He provided subject matter guidance and counseling on Fraud Assessments, internal investigations, and Risk Valuations, which resulted in successful prosecutions of government contractors. He reviewed and analyzed unit’s financial operations and budget. He managed large inventory of investigations including an overbilling scheme of \$1.4M on IRS government program. \_\_\_\_\_ developed, managed and provided fraud-awareness training program to government contract representatives.

**Key Achievements:**

- Improved product line by developing and implementing report writing quality plan.
- Managed large inventory of investigations including an overbilling scheme of \$1.3M on IRS government



[Redacted]

**Addx Corporation**

program.

- Developed and provided fraud awareness training program to government contract representatives.

**US Treasury Inspector General for Tax Administration  
 Senior Criminal Investigator**

**2001-2004**

[Redacted] performed detailed reviews and analysis of government contractor financial data. He supervised teams and provided guidance to coworkers on procurement related issues. He recognized by US Attorney’s Office as Subject Matter Resource on matters involving government contracting. He routinely led teams of auditors and investigators in conducting thorough review of procurement programs through successful internal audits and investigative initiatives. He routinely reviewed and analyzed company financial statements to identify fraud and internal control weaknesses. [Redacted] was responsible for prosecutions involving fraud under the Civil False Claims Act in excess of \$1M loss. He developed successful fraud program within Treasury Department to oversee \$21.6B in contracts.

**Key Achievements:**

- Responsible for prosecutions involving fraud under the Civil False Claims Act in excess of \$1M loss.
- Independently developed contacts/sources for cases involving major contract fraud investigations and was successful in prosecution of defendants.
- Developed successful fraud program within Treasury Department to oversee \$21.6 B in contracts.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[Redacted]	Personnel Office C/O Timothy Camus, IG for Investigations	BPD – Human Resources Employment Services Branch 200 Third Street Parkersburg, WV 26106	[Redacted]

**Defense Criminal Investigative Service (DCIS), Dept of Defense (DoD) Office of Inspector General, 1990-2001  
 Special Agent**

Routinely conducted financial crime and procurement fraud investigations associated with procurements and purchases of equipment/services by government contractors. Worked in conjunction with the Defense Contract Audit Agency (DCAA) and coordinated investigations with the US Attorney’s Office or appropriate authority. Provided assistance with Grand Juries, trials, and evidentiary hearings. Conducted and developed valuable training programs regarding procurement process, white collar, and procurement fraud investigations, Civil False Claims Act, and applicability of FAR. Created concise reports of investigation for clients. Routinely reviewed financial statements and budgetary information for fraud. Received prestigious [Redacted] award. He was successful prosecution of CEO and CFO of publically traded company for providing false financial statements prior to sale to private firm, including identifying overstated net worth of \$30M. Responsible for identifying false billings and bribes by government contractor in excess of \$7M. He recovered \$5.3M from major government contractor for false billings under the Civil False Claims Act. He gained recognition award from US Attorney for false surety bond investigations of \$7.7M. Total recoveries in financial fraud investigations of \$70+M.

**Key Achievements:**

- Received prestigious [Redacted]
- Successful prosecution of CEO and CFO of publically traded company for providing false financial statements prior to sale to private firm; to include identifying overstated net worth of \$30M.
- Responsible for identifying false billings and bribes by government contractor in excess of \$7M.
- Recovery of \$5.3M from major government contractor for false billings under Civil False Claims Act.
- Recognition award from U.S. Attorney for false Surety Bond investigation of \$7.7M
- Total recoveries in financial fraud investigations of over \$70M and outstanding performance ratings.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[Redacted]	Resident Agent in Charge	100 S. Charles St., Room 401 Baltimore, MD 21201	[Redacted]



**Defense Contract Audit Agency (DCAA)  
Auditor**

**1986-1990**

performed contract audits on government contractors, including incurred cost submissions, proposals, cost allowability assessments, Cost Accounting Standards, and indirect rates pool calculations. Provided accounting and financial advisory services regarding contracts/subcontracts to all Department of Defense components responsible for procurement and contract administration. He acquired in-depth knowledge of FAR as well as government contracting regulations and practices. He provided pre-award and post-award contract audit services. He performed contractor internal control systems audits, including system weakness reviews. Mr. Armstrong received award for identification of systemic internal control weaknesses of major government

**Key Achievements:**

- Received award for identification of systemic internal control weaknesses of major government contractor.

Contact Name	Contact Job Title	Address	Contact Number
Personnel	Human Resources Specialist	615 Chestnut Street, Suite 1000 Philadelphia, PA 19106	



## **A.2. Program Manager**

See A.1, Partner/Principal.



### A.3. Project Manager

	<b>Addx Corporation</b>
<b>Project Manager</b>	

\_\_\_\_\_ has over 10 years of experience in resource leadership through the application of practical skills in organizing, planning, and executing complex tasks. He has achieved successful results from utilizing highly effective management principles including the preparation and successful implementation of detailed project plans, budgets and staffing assignments, specifically tuned to meet contractual objectives. He performs budget analysis, determines cost saving measures, and institutes measures to ensure margin adherence. \_\_\_\_\_ functions as Program Manager of Compliance & Forensic Investigations managing personnel, case inventory, and day to day operations of a government contracts with the Department of Veterans Affairs (VA), Center for Acquisition Innovation (CAI). He oversees a team of site examiners, and monitors their compliance with contractual and legal requirements under established federal contracts. He performs evaluations of compliance and conducts reviews of program performance, analyzing findings and making recommendations for operational improvements. He creates workflow diagrams to aid the draft of procedural manuals designed to enhance program performance and streamlines editing and review of site visit reports. He resolves work production and staffing issues using qualitative research identifying factors impacting personnel. \_\_\_\_\_ rose from a Senior Investigator to Program Manager for United States Investigation Service (USIS). Managing six team leaders and collectively over 160 employees, he coordinated senior management to exceed operational and financial performance goals. He established productivity, quality, and staffing goals and monitored performance metrics to ensure reasonable results. He holds Project Management Professional merit as well as Essentials of Project Management training.

#### Education & Training

- Project Management Professional (PMP) Credential, Project Management Institute (PMI)
- Essentials of Project Management Certificate, Villanova University
- B.S., Criminal Justice, Radford University

#### Experience with Similar Contracts

<b>Addx Corporation</b>	<b>11/2012 – Present</b>
<b>Program Manager</b>	

\_\_\_\_\_ is responsible for managing personnel, case inventory, and day to day operations of a government contracts with the Department of Veterans Affairs (VA), Center for Acquisition Innovation (CAI). He oversees a team of site examiners responsible for conducting site visits and in depth examinations of federal contractors, and monitors their compliance with contractual and legal requirements under established federal contracts. He performs evaluations of compliance with Federal Acquisition Regulation (FAR) and VA Acquisition Regulation (VAAR) regulations. \_\_\_\_\_ conducts reviews of program performance, analyzing findings and making recommendations for substantive operational improvements based upon continuous review of deliverable quality and technical accuracy. He creates workflow diagrams to aid the draft of procedural manuals designed to enhance program performance and streamline editing and review of site visit reports. \_\_\_\_\_ has the ability to identify and resolve work production and staffing challenges utilizing qualitative research to identify factors impacting personnel. He also drafts action plans to address and relieve external and internal causes. Skilled in development of project and program goals and practical application of applicable management techniques, he works to achieve of milestones and objectives. He has excellent communication and collaboration skills and can work within diverse team settings.

#### Reference:

Contact Name	Contact Job Title	Address	Contact Number
_____	_____	4900 Seminary Ave. #570 Alexandria, VA 22311	_____

<b>USIS</b>	<b>2001- 9/2012~1/2012-9/2012</b>
<b>Program Manager</b>	

\_\_\_\_\_ held overall responsibility for all company EEO and IG programs. He established program policy, set and controlled program budgets and defined & assigned resources needed to execute all facets of the program successfully. He restructured the workforce compensation plan to address guidelines for new contracts and ensured financial and operational performance. \_\_\_\_\_ performed targeted identification of new EEO business opportunities, creating capture strategies such as marketing materials; e-mail, mail, and phone introductions;



**Addx Corporation**

follows-up on meetings for further discussion with potential customers and probable opportunities. Establishing competitive pricing and proposal content resulted in an award in May 2012 of \$500K for the TCV contract. He created operation goals based upon business and contractual obligations; he established milestones and program deliverables. [REDACTED] completed budget analysis, resolved issues and discrepancies, determined cost saving measures, and instituted measures to ensure margin adherence. He developed and assisted in the integration of metrics into all of the organizations programs and activities. He also developed compelling, customer-focused capture strategies, teaming strategies and win themes. [REDACTED] operated independently and executed account strategies and call plans.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[REDACTED]	Senior Director	7799 Leesburg Pike, Falls Church, VA 22043	[REDACTED]

**District Manager**

**4/2009-5/2011**

Mr. Cilla successfully managed a business district of six Team Leaders, 120 investigators, and 40 sub-contractors. He was effective in coordinating efforts among senior management, leadership staff and field investigative staff. Often exceeding operational and financial performance objectives, he successfully managed an annual operating budget exceeding \$20M. [REDACTED] established productivity, quality, and staffing goals and monitored performance metrics to ensure satisfactory results. He organized, developed, and supervised the creation of training, operating policy and workload procedures as well as monitored their implementation and success.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[REDACTED]	Chief Strategy Officer	1501 K St. NW # 300, Washington, DC 20005	[REDACTED]



#### A.4. Senior Consultants

	Addx Corporation								
<p>Senior Consultant</p>									
<b>Demonstrated Experience</b>									
<p>_____ has over 30 years of experience in investigative service for the Federal government. As a Senior Special Agent for Treasury Inspector General, _____ advised coworkers and other agencies assigned to assist in a misconduct investigation regarding of IRS Senior Executives and TIGTA employees. She supervised an internal affairs group and communicated with management and agents. Serving the Treasury Inspector General as Special Agent, _____ coordinated complex investigations involving a multi-million dollar bank failure. Bank officers and an employee were prosecuted for their misconduct. For the E. Naval Criminal Investigative Service she organized a credit card, bank, and vehicle fraud investigations. Conducting these investigations she obtained grand jury subpoenas, search warrants, command authorized search warrants, reviewed records, processed evidence for forensic analysis, interviewed witnesses, and conducted surveillances. She holds formal training as an investigator and PMP leadership preparation.</p>									
<b>Education &amp; Training</b>									
<ul style="list-style-type: none"> <li>B.A., Accounting, University of Massachusetts</li> <li>PMP Certification, Federal CIO University</li> <li>Criminal Investigator Training Program (Basic); FLETC</li> <li>U.S. Postal Inspector Training Program</li> </ul>									
<b>Experience with Similar Contracts</b>									
<p><b>Treasury Inspector General for Tax Administration (TIGTA)</b></p>									
<p><i>Senior Special Agent</i> <span style="float: right;"><b>10/2005 – 9/2006 ~1/2002-8 2004</b></span></p> <p>_____ independently developed contacts and sources for cases involving major investigations. When appropriate, coordinated, informed, and provided guidance to co-workers from TIGTA and other agencies assigned to assist in an investigation. She conducted internal investigations regarding the misconduct of Internal Revenue Service (IRS) Senior Executives and TIGTA employees. The misconduct involved violations of Federal law as well as administrative regulations.</p>									
<p><i>Assistant Special Agent In-Charge (ASAC)</i> <span style="float: right;"><b>8/2004-10/2005</b></span></p> <p>_____ was responsible for operating and supervising an internal affairs group within the Special Inquiries and Intelligence Division (SIID). As the ASAC, she was responsible for communicating and interacting with agents and management.</p>									
<p><b>Reference:</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Contact Name</th> <th>Contact Job Title</th> <th>Address</th> <th>Contact Number</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>Senior Special Agent</td> <td>Treasury IG, Washington,</td> <td>_____</td> </tr> </tbody> </table>		Contact Name	Contact Job Title	Address	Contact Number	_____	Senior Special Agent	Treasury IG, Washington,	_____
Contact Name	Contact Job Title	Address	Contact Number						
_____	Senior Special Agent	Treasury IG, Washington,	_____						
<p><b>Treasury Inspector General (TIG)</b> <span style="float: right;"><b>8/1999-8/2000</b></span></p> <p style="text-align: center;"><i>6.4.1.2 Special Agent</i></p> <p>_____ conducted and coordinated sensitive investigations involving misconduct by Department of Treasury personnel. She was a co-case agent on a multi-million dollar bank failure in West Virginia. She conducted several critical interviews of key witnesses and assisted in the recovery of several hundred boxes of buried bank records. Two bank officers were prosecuted for bank fraud and received jail sentences in excess of six years. In addition, _____ investigated an employee suspected of committing attendance fraud. Records were reviewed and interviews were conducted. The employee was prosecuted.</p>									
<p><b>Reference:</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Contact Name</th> <th>Contact Job Title</th> <th>Address</th> <th>Contact Number</th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>Program Manager</td> <td>4900 Seminary Ave. #570 Alexandria, VA 22311</td> <td>_____</td> </tr> </tbody> </table>		Contact Name	Contact Job Title	Address	Contact Number	_____	Program Manager	4900 Seminary Ave. #570 Alexandria, VA 22311	_____
Contact Name	Contact Job Title	Address	Contact Number						
_____	Program Manager	4900 Seminary Ave. #570 Alexandria, VA 22311	_____						
<p><b>E. Naval Criminal Investigative Service</b> <span style="float: right;"><b>1997-1999</b></span></p> <p><b>Special Agent</b></p>									



**Addx Corporation**

planned, organized, and conducted operations and investigations in accordance with applicable Department of Navy directives While assigned to the Marine Corps Base, Quantico, VA, she was involved in numerous investigations regarding credit cards, bank fraud, and vehicle fraud. These investigations involved obtaining grand jury subpoenas, search warrants, command authorized search warrants, reviewing records, processing evidence for forensic analysis, interviewing witnesses, and apply surveillance methods.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
	Program Manager	US State Dept., Rosslyn, V	



[Redacted] Senior Consultant/Project Manager/ Subject Matter Expert	<b>CES LLC</b>
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**Demonstrated Experience**

[Redacted] has over 20 years of experience investigating crimes for the Federal government. Operating as Vice President of CES LLC, [Redacted] served Health and Human Services, Centers for Medicare & Medicaid Services (HHS, CMS) as a Subject Matter Expert. He addressed government concerns and interacted with prime contractors in an effort to expedite backlog of site visits. He created a process to transfer inspectors, managed training materials as well as created scripts and training videos. [Redacted] managed investigators and worked closely with Los Angeles County District Attorney’s Office investigating financial crimes which uncovered \$40M of fraudulent Medicare payments and prosecution of 15 individuals. As Assistant Medical Chief for California Bureau of Medi-Cal Fraud he provided oversight for multi-million dollar healthcare fraud investigations. He managed field offices of support staff, presented investigative techniques and supervised investigations. He holds a degree in Criminal Justice as well as numerous applicable awards.

**Education & Awards**

- B.S., Behavior of Science/Criminal Justice, New York Institute of Technology (NYIT)
- Hubert H. Humphrey Award for Service to America
- Administrator’s Citation for Leadership of the Miami Fraud Team
- Administrator’s Award-Local Fraud Fighting Accomplishment
- Silver Eagle Award-Los Angeles District Attorney’s Office
- Attorney General’s Excellence in Supervision Award
- U.S. HHS/OIG Services-Integrity Award

**Experience with Similar Contracts**

**CES LLC** **2011-Present**  
**Vice President of Healthcare Operations**

[Redacted] worked with the prime contractor on the HHS/CMS Supplier Site Visit Verification Contract as a Subject Matter Expert. He fielded and addressed government concerns as the project progressed to the actual site visit stage. [Redacted] also interacted with the prime contractor and other sub-contractors to expedite the backlog of site visits which had accumulated early in the project. He developed a process to loan inspectors from one company to another, managed the creation of training materials, formulated concepts, and developed scripts and used CES employees as actors for the training videos. [Redacted] also formulated, developed, and scripted a telephone site visit process which drastically reduced the expenses associated with remote site visits.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[Redacted]	Sr. VP Operations	1165 Jeffrey Ave., Crofton, MD. 2111	[Redacted]

**Health and Human Services/Centers for Medicare and Medicaid Services** **2005- 2011**  
**Director of the Western Integrity Regional Field Office**

[Redacted] oversaw a staff of federal investigators who conducted site visits, interviews and investigations on all types of Medicare providers. He coordinated with the Los Angeles County District Attorney’s Office on financial crimes cases which led to the prosecution of fifteen providers for failure to pay state income tax on \$40M of Medicare payments. He also wrote and directed a statement of work where over 1000 site visits were conducted by a Medicare contractor in Texas which saved an estimated at \$28M. While serving as Director of the Western Integrity Office, [Redacted] also temporarily acted as the Director of the Miami office where, after re-energizing the staff and introducing some new investigative techniques, the Miami office caused numerous providers to be revoked and hundreds of millions of dollars saved because of site visits. While functioning as Director of both offices, [Redacted] appealed to upper management to allow CMS employees assigned non-investigative units to witness and experience fieldwork firsthand. Although first seen with a critical eye, it turned out to be an extremely successful program.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number



[REDACTED]	Director, South East Integrity Field Operations	909 SE 1 <sup>st</sup> . Ave. #732 Miami, FL. [REDACTED]
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**California Bureau of Medi-Cal Fraud  
Assistant Chief**

**1989-2005**

[REDACTED] provided oversight of multi-million dollar government-funded healthcare fraud investigations. He managed five field offices with a staff of forty five agents, analysts, and support staff. [REDACTED] organized and conducted large investigations which included site visits, interrogations, interviews, surveillance, and undercover operations. He presented on healthcare fraud investigative techniques for law enforcement and private sector insurers. [REDACTED] supervised the Drug Diversion Unit, instructed DEA and other agencies on methods for conducting diversion undercover operations, investigations, and prosecutions, and supervised background investigations. [REDACTED] also prepared testimony on SSI fraud before the 103<sup>rd</sup> U.S. Congress: "Subcommittee on Oversight and Human Resources of the Committee on Ways and Means." He provided testimony to the California State Judiciary Committee on healthcare fraud and patient abuse issues. [REDACTED] also worked as a liaison with federal, state, and local law enforcement officials, and oversaw the design of data analysis software by a private contractor to resolve an incompatibility issue between government software programs that was allowing fraudulent billing to occur.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[REDACTED]	Special Agent-In-Charge	1455 Frazee Rd., #315 PO Box 85266 San Diego, CA. 92186	[REDACTED]



**Broad Spec Inc.**

Subject Matter Expert/ Project Manager/Senior Cons.

**Demonstrated Experience**

is an experienced Civil Engineer in both the public and private sector. For Los Angeles Unified School District (LAUSD), he manages a contract that provides building code inspection of a large project modernizing and rehabilitating schools. It is a \$20B effort and the largest school construction program in the U.S. For San Bernardino Associated Governments, oversaw State Route 210 projects, a 10 year project paving a 27 mile road. managed the geotechnical engineering consulting services for the construction of the most recent and final phase. For Lewis Operation Incorporation, he managed a team of engineers and inspectors evaluating over 2,000 homes El Centro, CA. He prepared individual assessment reports for each structure and recommendations for the remediation of foundations.

**Education, Training, Certifications, Awards & Publications**

- B.S., Civil Engineering, Colorado School of Mines

**Experience with Similar Contracts**

**Los Angeles Unified School District (LAUSD) 2010-Present**  
 manages this on call contract to provide building code inspection of new school construction and modernization / rehabilitation of existing schools to support the LAUSD Bond Program. LAUSD is the 2nd largest school district in the United States. The Facilities Services Division oversees all maintenance and operations, including the construction and modernization program. The bond program is the largest school construction program in the United States, with more than five voter approved bond measures totaling \$20.6B coupled with billions in matching funds from the State of California

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
		LAUSD 333 S Beaudry Ave. Los Angeles, CA 90017	

**San Bernardino Associated Governments 2003-2007**  
 oversaw he State Route 210 projects that were constructed over a 10 year period between 1997 and 2007. They included 11 segments that ultimately constructed of 27 miles of new highway. The new construction provides three mixed flow lanes, and 1 HOV lane in each direction through the communities of Upland, Rancho Cucamonga, Fontana, Rialto and San Bernardino. managed the geotechnical engineering consulting services for the construction of the most recent and final phase of the route 210 projects through segments 9 thru 11. These segments included 8.4 miles of new highway construction from the end of the segment 8 in Fontana, CA to its final connection to State Route 215 and the existing Route 30 in San Bernardino, CA. The new highway included new bridge construction, construction of a pedestrian bridge, construction of a storm drain, widening road separations, reconstruction of loop ramps, road realignments and widening's, retaining and sound walls, and construction of on-ramps and off-ramps.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
	Resident Engineer	Harris & Associates Inc. 1401 Willow Pass Rd. #500 Concord, CA 34520	

**Lewis Operating Corporation 1993-1996**  
 managed a team of engineers and inspectors to evaluate 2,100 distressed homes in El Centro, CA. He oversaw the structural assessment of foundations and floor systems and site drainage conditions at each residence. In the initial year of a three year program, prepared individual assessment reports for each structure and provided recommendations for the remediation of distressed foundations. In the second year of the program managed the inspection and monitoring of repair activities for the distressed structures, and prepared a second round of condition assessments on each of the 2,100 residences. In the third and final year of the program, managed the final assessment of the structures and prepared individual assessment reports that identified the initial conditions, the repairs made and the results of the final year's assessment monitoring the performance of the repairs.



**Reference:**

<b>Contact Name</b>	<b>Contact Job Title</b>	<b>Address</b>	<b>Contact Number</b>
[REDACTED]	Executive Vice President	Van Daele Development Corp. 2900 Adams St Riverside, CA 92504	[REDACTED]



## A.1. Consultant

	<b>Addx Corporation</b>								
Consultant									
<b>Demonstrated Experience</b>									
<p>██████████ is an experienced senior investigator with direct experience managing investigative efforts from commencement to completion. As a Fraud Examiner for Addx he conducts interviews of Senior Executive level company officials for Service-Disabled Veteran Owned Small Businesses or Veteran Owned Small Businesses on behalf of the Department of the Veterans Administration (VA). ██████████ ensures compliance with contractual requirements and prepares concise reports of findings. For Health Integrity, ██████████ conducted data analysis/investigations for the Centers for Medicare and Medicaid Services. He prepared investigative reports and referrals to law enforcement agencies. Serving the U.S. Postal Service he oversaw criminal investigations in the areas of Healthcare Fraud, Procurement Fraud, and Contract Fraud. He reviewed reports and ensured all aspects of the investigation were properly documented and recorded.</p>									
<b>Education, Training, Certifications, Awards &amp; Publications</b>									
<ul style="list-style-type: none"> <li>• B.S., Public Administration/Criminal Justice, National University</li> </ul>									
<b>Experience with Similar Contracts</b>									
<p><b>Addx Corporation</b>  <b>Fraud Examiner</b></p> <p>██████████ conducts interviews of Senior Executive level company officials (corporate organizational, financial and business records) to determine ownership/control eligibility as Service-Disabled Veteran Owned Small Businesses or Veteran Owned Small Businesses on behalf of the Department of the Veterans Administration (VA). His reviews are conducted on-line and/or on-site at the client location. He conducts exhaustive reviews of business entities (contract and supporting financial records) performance on specific government contracts to insure compliance with contractual requirements pertaining to labor performance. After reviews ██████████ prepares concise reports of findings for presentation to the VA for final determinations.</p>	<p><b>9/2010 - Present</b></p>								
<b>Reference:</b>									
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Contact Name</th> <th>Contact Job Title</th> <th>Address</th> <th>Contact Number</th> </tr> </thead> <tbody> <tr> <td>██████████</td> <td>Director of Compliance &amp; Forensic Investigations</td> <td>4900 Seminary Ave. #570 Alexandria, VA 22311</td> <td>██████████</td> </tr> </tbody> </table>		Contact Name	Contact Job Title	Address	Contact Number	██████████	Director of Compliance & Forensic Investigations	4900 Seminary Ave. #570 Alexandria, VA 22311	██████████
Contact Name	Contact Job Title	Address	Contact Number						
██████████	Director of Compliance & Forensic Investigations	4900 Seminary Ave. #570 Alexandria, VA 22311	██████████						
<p><b>Health Integrity, LLC, Computer Evidence Specialist, Fraud Investigator</b></p> <p>██████████ conducted data analysis/investigations to identify and detect Healthcare fraud schemes and deficiencies for the Centers for Medicare and Medicaid Services. He prepared concise investigative reports/referrals to law enforcement agencies.</p>	<p><b>2010 - 2012</b></p>								
<b>Reference:</b>									
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Contact Name</th> <th>Contact Job Title</th> <th>Address</th> <th>Contact Number</th> </tr> </thead> <tbody> <tr> <td>██████████</td> <td>██████████</td> <td>██████████</td> <td>██████████</td> </tr> </tbody> </table>		Contact Name	Contact Job Title	Address	Contact Number	██████████	██████████	██████████	██████████
Contact Name	Contact Job Title	Address	Contact Number						
██████████	██████████	██████████	██████████						
<p><b>U.S. Postal Service-Office of Inspector General</b>  <b>Supervisory Special Agent/Assistant Special Agent In Charge</b></p> <p>Mr. Garcia oversaw criminal investigations in the areas of Healthcare Fraud, Procurement Fraud, and Contract Fraud. He reviewed reports and insured all aspects of the investigation were properly documented and recorded. Mr. Garcia was a liaison between senior members of federal law enforcement agencies, U.S. Postal Service and federal prosecutors.</p>	<p><b>2000-2007</b></p>								
<b>Reference:</b>									
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Contact Name</th> <th>Contact Job Title</th> <th>Address</th> <th>Contact Number</th> </tr> </thead> <tbody> <tr> <td>██████████</td> <td>Special Agent in Charge</td> <td>Bedford, TX</td> <td>██████████</td> </tr> </tbody> </table>		Contact Name	Contact Job Title	Address	Contact Number	██████████	Special Agent in Charge	Bedford, TX	██████████
Contact Name	Contact Job Title	Address	Contact Number						
██████████	Special Agent in Charge	Bedford, TX	██████████						



## A.2. Associate/Staff

	Addx Corporation
Associate Staff	

### Demonstrated Experience

\_\_\_\_\_ has over 25 years of experience in investigative service for government agencies and foreign governments. \_\_\_\_\_ has the ability to effectively interface and coordinate with Department of Defense (DoD) Senior Office Government Agencies and Foreign Governments officials. He also has the ability to effectively liaison between mid and Senior Management of Federal, State and local law enforcement. As a Special Agent for Afghanistan Reconstruction (SIGAR), he successfully conducted investigations recovering monetary items by applying criminal, civil administrative methods. As an Intelligence Analyst for Booz Allen he conducted investigations on law enforcement organizations regarding terrorism funding. A Special Agent for NCIS, \_\_\_\_\_ led investigations for procurement fraud and counter-terrorism, force protection and other perspective services. \_\_\_\_\_ holds applicable degrees and formal investigative training in Computer Forensics, Protective Service and Overseas High Risk training.

### Education & Training

- B.A., Political Science , Christopher Newport University
- A.A.S., Police Science, Thomas Nelson CC
- Graduate School– Political Science, Old Dominion University (Incomplete), Numerous Procurement Fraud Training Classes
- Computer Forensic Training
- Protective Service Training
- Overseas High Risk Training
- Received Joint Civilian Service Medal

### Experience with Similar Contracts

**Special Inspector General for Afghanistan Reconstruction (SIGAR) 03/2010-Present**  
**Special Agent**

As a Special Agent, he was assigned to conduct procurement fraud and corruption investigations relative to the reconstruction of funds for Afghanistan. He traveled throughout Afghanistan to interview complainants, victims, witnesses, and contractors regarding violations of Bribery, Contract Mis-Charging, Product Substitution, Non Payment of Contractors, Product Substitution, Conflicts of Interest. He worked independent and with a Task Force environment of the International Contract Corruption Task Force (ICCTF). Successfully investigated violations of federal law resulting in monetary recoveries of tax dollars through criminal, civil and administrative remedies. \_\_\_\_\_ prepared complex written analysis and reports of investigative effort for U.S. Attorneys and Inspector General offices. He was assigned to HQ as Operations Officer focusing on procurement, acquisition, logistics, training and policy oversight. He served as case agent on complex civil and criminal procurement investigations.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
_____		Special Inspector General for Afghanistan Reconstruction (SIGAR)	_____

**Booz Allen Hamilton 03/2009-03/2010.**  
**Intelligence Analyst**

\_\_\_\_\_ worked as intelligence analyst conducting research on terrorist groups, operations, backgrounds, identified funding mechanisms and structures. He provided complex reports to Department of Defense (DOD) and Homeland Security officials. He was assigned to DIA and provided training to DOD and law enforcement organizations regarding terrorism funding.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
_____		Naval Criminal Investigative Service (NCIS)	_____

**Naval Criminal Investigative Service (NCIS) 9/1984-11/2008**



**Addx Corporation**

**Special Agent**

specialized in crimes against persons, property, procurement fraud, counter-terrorism, force protection, protective services. He worked collectively and independently and in Task Force environments.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
Human Resorces		Booz Allen Hamilton	



### A.3. Subject Matter Experts

	<b>Addx Corporation</b>
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Subject Matter Expert

#### Demonstrated Experience

██████████ has more than 20 years of experience as Subject Matter Expert in audit & investigative litigation support, internal & financial fraud investigations, internal audits, and forensic accounting oversight. ██████████ was recognized by the Department of Treasury and Department of Justice, U.S. Attorney’s office as well as the Director of FBI and ATF for his investigative efforts of numerous high profile criminal and civil convictions. ██████████ currently functions as Addx’s Examiner for compliance and Forensic Investigations; he is highly regarded for his knowledge of the Federal criminal, civil, and administrative processes.

██████████ has been involved with many investigations and examinations that have been coordinated with the U.S. Attorney’s Office or appropriate authorities. This coordination and assistance has included grand juries, trials, and hearings. He has in depth knowledge of Federal rules of criminal procedures for both criminal and civil litigation processes, to include indictments, information’s, convictions, sentencing, search warrants, arrests, fines and restitution.

In essence, ██████████ successfully maintains his knowledge with the ever changing regulations and protocols and ensures that activities are conducted in accordance with established specifications, regulations and guidelines.

**Core Competencies** - Management experience; Litigation Support; Fraud Screening & Assessments; Government Contracting; Contractor Reviews; Internal & External Investigations; Audit / Investigative Plan Knowledge; Internal Control Reviews; Internal Audits; Compliance Audits;

#### Education & Training

- B.S., Accounting, Bryant University
- Federal Law Enforcement Training Center (FLETC)
- Member – Association of Certified Fraud Examiners
- Certified Public Accountant
- Certified Fraud Examiner

#### Experience with Similar Contracts

<b>Addx Corporation</b>	<b>2011-Present</b>
<b>Examiner</b>	

██████████ conduct examinations of business participants/applicants for Verified status as Service-Disabled, Veteran-Owned Small Businesses, and Veteran Owned Small Businesses. He reviews financial and related records, traces funds, analyzes information and prepares reports for the Veterans Administration (VA).

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
██████████	██████████	4900 Seminary Ave. #570 Alexandria, VA 22311	██████████

<b>Military Professional Resources, Inc.</b>	<b>2008-2009</b>
<b>Embedded Law Enforcement Professional</b>	

██████████ worked with the military in Iraq, as law enforcement expert, examining forensic documents and relative evidence, conducted interviews, traced leads and evidence to corroborate or establish facts surrounding incidents under review.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
Personnel Specialist	Personnel Office	1320 Braddock Place Alexandria, VA 22314	██████████



	<b>Addx Corporation</b>
<b>U.S. Department of Treasury</b>	<b>1987-2000</b>

**Special Agent**

██████████ conducted financial/forensic investigations, analyzed records, reviewed for compliance with accounting practice and federal tax laws. He searched, analyzed, and evaluated financial information; collected evidence and traced assets. ██████████ presented evidence in court and gave relative testimony.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
██████████	Special Agent	60 Quaker Ln Warwick RI	██████████

**Inspector General Office**

**1986**

██████████ conducted compliance and financial audits of individuals and entities receiving government housing program funds to make compliance/non-compliance determinations, identify fraud and abuse and issue reports to U.S. Congress.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
Personnel	Human Resources Specialist	26 Federal Plaza New York, NY 10278	██████████



[Redacted] Subject Matter Expert/Project Manager/ Subject Matter Expert	<b>CES LLC</b>
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**Demonstrated Experience**

[Redacted] has over 35 years of experience in fraud investigations, operations, crisis and program & project management. As Section Chief for the FBI, [Redacted] led the [Redacted]

[Redacted]

- B.S., Criminal Justice Administration, Philadelphia University
- A.S., Police Science, Temple University
- 2005 US Attorney Generals Award for Distinguished Service
- CIA Intelligence Fellows Program
- Kellogg School of Management Executive Programs-Leading Strategic Change
- U.S. Army Combating Terrorism Executive Seminar at West Point
- Police Officer of the Year for 1989, North Penn Chamber of Commerce.

**Chronological Work History**

**FBI, National Threat Center Section** **2008- 2010**  
**Section Chief**

[Redacted] held a Senior Executive Service position leading the [Redacted]

[Redacted]

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[Redacted]	President	5315 A1A S. St. Augustine, FL 32080	[Redacted]

**FBI** **2005-2008**  
**Assistant Special Agent in Charge**

[Redacted] was the Program Manager for the National Security mission including Counterterrorism, Counterintelligence, Intelligence programs, Security [Redacted]

[Redacted] interacted daily with heads of federal, state, local, university, and tribal law enforcement agencies statewide.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[Redacted]	Section Chief	[Redacted] Headquarters, DC 20355	[Redacted]

**National Joint Terrorism Task Force** **2002-2005**  
**Unit Chief**

[Redacted]

[Redacted] managed a \$29M budget, national program oversight, resources, policy, and administrative matters.



Senior Consultant/Project Manager/ Subject Matter Expert	<b>Broad Spec Inc.</b>
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**Demonstrated Experience**

President of Broad Spec Inc., [redacted] provides oversight, compliance and contract management for government clients. As Senior Executive Vice President of P&D Consultants, [redacted] managed a government facility of operations relative to inspection services over the U.S. region; he also managed contracts for federal clients. Serving as Chief Project Manager for City of Merced in California, [redacted] managed the Federal grant program, inspections, construction compliance and permits. Having a number of accomplishments, [redacted] was elected President of California Building Officials (CALBO), representing 550 local municipalities. He served as part of the FEMA response team after Hurricane Katrina, providing structural review and analysis of structural integrities impacted by the Hurricane. He also holds certification as a building official and inspector.

- Education & Training**
- B.S., Public Administration
  - Certified Building Official, ICC/IBO
  - Certified Building Inspector, ICC/IBO

**Experience with Similar Contracts**

**President, Broadspec Inc., President** **2006 - Present**

[redacted] is responsible for all marketing, contract negotiations, personnel, payroll, accounting oversight, contract management, customer service, client relations, and compliance with all relevant local, State and federal laws.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[redacted]	Broad Spec Accounts	3280 Parkridge Rd. Sedalia, CO 80135	[redacted]

**P&D Consultants, Senior Executive Vice President** **1995- 2006**

[redacted] managed and directed entire Government Facility Operations dealing with Inspection Services, Plan Checking Services, assessment operations, growth management over United States region. He also managed personnel, contracts, marketing, administration, supervision, invoicing, and contract management for local State and federal clients.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[redacted]	President AECOM America's	Anaheim, CA	[redacted]

**City of Merced, California, Building Official Chief Project Manager** **1984 - 1995**

[redacted] oversaw and managed the Building Department, CDBG Federal Grant Program, planned reviews, inspections, public right of way construction compliance, grant compliance, permit issuance and documentation management.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[redacted]	City Manager	678 West 18th Street Merced, California 95340	[redacted]



#### A.4. Administrative Support Staff

	<b>Addx Corporation</b>
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Administrative Support Staff

##### Demonstrated Experience

\_\_\_\_\_ has five years of experience providing administrative support to government and corporate clients. For DoD Contractors LLC she recorded status meeting minutes, assisted in the planning events, arranged meetings, created press releases and advertisements, and website development. She developed and edited documents and assisted in the completion of the internal corporate Employee Handbook, she helped compile 30 Standard Operating Procedures. \_\_\_\_\_ also developed corporate training materials. As the Marketing and Communications Intern for Grove City Chamber of Commerce \_\_\_\_\_ supported the Director of Chamber Relations, her duties included helping creating the bi-monthly newsletter, writing press releases for community newspapers and coordinating large community outreach events. \_\_\_\_\_ designed flyers and logos as promotional tools for events. She served as a liaison with the media as well as managed charts and diagrams for vendor locations. \_\_\_\_\_ properly utilizes office equipment including, copiers, fax machines, scanners, multi-line telephone systems and Microsoft Office software.

##### Education & Training

- B.A., Communications, Strategic Communication, Ohio State University
- B.A., French, Université de Bourgogne

##### Experience with Similar Contracts

**Addx Corporation** **5/2012-Present**  
**Project Coordinator**

\_\_\_\_\_ supports the program management team in the operation of Center for Veterans Enterprise program (Department of Veterans Affairs). She maintains, processes, and provides accurate and updated information for Service-Disabled Veteran owned, Small Business/Veteran owned and Small Business applications. She produces custom executive reports from Lexis/Nexis system regarding operational levels of applications. \_\_\_\_\_ plans, writes, and reviews reports for veteran owned business applications. She maintains repository (Case Management System) of submitted applications, to include application documents consisting of personal and corporate financial records. She processes these records in a timely and efficient manner, assists in preparing and reviewing monthly invoices and communicated daily with the Department of Veterans Affairs customer. \_\_\_\_\_ served as a liaison between client and site application examiner.

##### Reference:

Contact Name	Contact Job Title	Address	Contact Number
_____	Director of Compliance & Forensic Investigations	4900 Seminary Ave. #570 Alexandria, VA 22311	_____

**DoD Contractors.org, LLC** **2010-Present**  
**Business Analyst**

\_\_\_\_\_ delivered management consulting services to LLC clientele, and worked to develop all facets of internal startup business. Her duties and activities included corporate ISO 9001:2008 She functioned as an auditor trained to interface with corporate clientele and to deliver business process improvement services in support of the ISO 9001:2008 standard. She supported clients in creating content and layout for the company website. She assisted the program manager and chief executive officer, as a member of project team, in the development of several client deliverables, to include strategic assessments and human capital improvement plans for the Department of Defense (DoD). \_\_\_\_\_ participated in weekly teleconference calls as well as Interim Progress Reviews and recorded status meeting minutes. She assisted in the planning of inaugural Business Expo by arranging meetings, creating press releases and advertisements, and the development of the Expo website. She also developed and edited several White Papers, Proposals, and Special Projects to be sent to potential clients. Assisting in the completion of the internal corporate Employee Handbook, she helped compile 30 Standard Operating Procedures. \_\_\_\_\_ also developed corporate training materials.

##### Reference:

Contact Name	Contact Job Title	Address	Contact Number
_____	Program Manager	3025 S Columbus St. Arlington, VA 22206	_____



**Grove City Chamber of Commerce**

**6/2009-9/2009**

**Marketing and Communications Intern**

As the Marketing and Communications Intern, [REDACTED] supported the Director of Chamber Relations by assisting with the organization's marketing and communications efforts to successfully grow The Grove City Chamber of Commerce in the local community. Her duties included helping create and design a bi-monthly newsletter for Chamber Members. She produced press releases for community newspapers. She coordinated large community outreach events including Family Fun Day, Farmer's Market, Youth Basketball Tournament, and Annual Auction.

[REDACTED] created flyers and logos as promotional tools for events. She answered media, member, and potential member inquiries. She also managed charts and diagrams for vendor locations and directed public to their appropriate location. [REDACTED] utilized office equipment; copiers, printers, fax machines, scanners, multi-line telephone systems and Microsoft Office software.

**Reference:**

Contact Name	Contact Job Title	Address	Contact Number
[REDACTED]	Marketing and Communications Intern	4069 Broadway Grove City, OH 43123	[REDACTED]

## State of New Jersey Division of Purchase and Property E-Buy RFQ # 768892S

### Volume II: Price Schedule

Submitted to:

**Damian Fantini**

[Damian.fantini@treas.state.nj.us](mailto:Damian.fantini@treas.state.nj.us)

Submitted By:

**Addx Corporation**

4900 Seminary Road, Suite 570

Alexandria, VA 22311

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

POC: Bill Millward

President & CEO

[wmillward@addxcorp.com](mailto:wmillward@addxcorp.com)

(o) 703.933.7637 x 202 (f) [REDACTED]



**April 8, 2013**

#### *Notice of Restriction*

*This response to the Government's Request for Quote includes data that shall not be disclosed outside of the Government and shall not be duplicated, used, or disclosed in whole or in part for any purpose other than to evaluate this response. If, however, a contract is awarded to this Offeror as a result of or in connection with the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from other sources without restriction. The data subject to this restriction are contained in this entire proposal.*



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## 1.0 Introduction

Addx Corporation (Addx) provides the following quote in response to the State of New Jersey, Division of Purchase and Property, Request for Quote (RFQ) to provide Program and Process Management Auditing, Financial Auditing and Grant Management, and Integrity Monitoring/Anti-Fraud Services for Disaster Recovery Assistance (Hurricane Sandy) Blanket Purchase Agreement (BPA) No. RFQ768892S (“the BPA”). Addx’ proposed pricing, which has been provided in Section 2.0 of this submission, is based on a thorough review of the requirements and the rates established under the Addx MOBIS GSA schedule.

Addx acknowledges the initial e-buy posting on 3/18/2013 under RFQ768892S, as well as Modification 1 posted 3/18/2013, Modification 2 posted 3/21/2013, Modification 3 posted 3/27/2013, Modification 4 posted 3/28/2013, Modification 5 posted 4/1/2013, Modification 6 posted 4/2/2013, Modification 7 posted 4/8/2013, and Modification 8 posted 4/4/2013.

## 2.0 Price Schedule

### 2.1 Price Labor Categories

Table 2.1.1. below details the skill classifications as identified by the State of New Jersey and the Addx GSA MOBIS labor category mapped as most similar in description and job requirements. The Addx GSA MOBIS labor categories are used as the basis for pricing.

<b>RFQ Skill Classification</b>	<b>GSA MOBIS Labor Category</b>
Partner/Principal	Executive Consultant
Program Manager	Sr. Management Consultant II
Project Manager	Sr. Management Consultant I
Senior Consultant	Management Consultant II
Consultant	Management Consultant I
Associate /Staff	Consultant II
Subject Matter Expert	Management Consultant II
Administrative Support	Associate Consultant II

Table 2.1.1. State of New Jersey skill classifications and corresponding Addx Corporation GSA MOBIS Labor Category.

### 2.2 Price Schedule

Based on the information provided in the RFQ, and to provide the State of New Jersey with the best value solution, Addx has proposed an up to 5% discounted pricing on some of the staff classifications. This discount is based upon our examination of the stated requirements and our ability to meet these needs efficiently with the least amount of cost.



<b>Line #</b>	<b>STAFF CLASSIFICATION</b>	<b>YEAR 1 HOURLY RATE</b>	<b>YEAR 2 HOURLY RATE</b>	<b>YEAR 3 HOURLY RATE</b>
17	Partner/Principal/Director	\$195.00	\$200.85	\$206.88
18	Program Manager	\$155.00	\$159.65	\$164.44
19	Project Manager	\$130.00	\$133.90	\$137.92
20	Subject Matter Expert	\$122.00	\$125.66	\$129.43
21	Senior Consultant	\$122.00	\$125.66	\$129.43
22	Consultant	\$111.00	\$114.33	\$117.76
23	Associate/Staff	\$96.00	\$98.88	\$101.85
24	Administrative Support Staff	\$71.00	\$73.13	\$75.32

### 3.0 Assumptions, Terms and Conditions

- 1) Addx would like to clarify that regarding litigation services, it is our understanding that Addx Corporation, as well as subcontractor, staff and documentation related to services (i.e. notes, work papers, etc.) provided to the State of New Jersey, will be made available. However, all legal support and respective labor will be provided by the state. Addx Corporation is not responsible for providing or supplying funding for, legal representation or defense of the State or any of its political subdivisions at its own cost.
- 2) Addx agrees to solicitation requirements, the State of New Jersey's Standard Terms and Conditions, provisions and clauses.
- 3) Price is good for 90 days.
- 4) Addx personnel abide by NJ Standards of Conduct and Restrictions. These expectations are made clear upon hiring and through periodic refresher training.
- 5) Addx provides highly experienced personnel at competitively reasonable rates. All personnel are exempt from the Wage Determination Act as they are considered either professional employees as defined in 29 C.F.R. Part 541 or computer employees who satisfy the computer professional exemption.
- 6) In the absence of specific acceptance criteria, reasonable professional standards shall apply.
- 7) All submitted pricing is currently on our GSA GS-10F-0349N MOBIS schedule. Discounts have been applied to the applicable labor categories.
- 8) Labor hour pricing is separate and fixed, and includes all the requisite cost build components. These fixed hourly rates apply to Addx and our subcontractors. Addx has no subsidiaries, affiliates, or an offeror under common control.
- 9) **Socioeconomic Status and Qualification as a small business under the 541611 NAICS.** For the purpose of this GSA MOBIS procurement, Addx Corporation qualifies as a Service Disabled Veteran Owned Small Business under NAICS 541611 (\$14M three year average revenue).

There are two components associated with this claim, which shall be discussed below:

- 1) Services Disabled Veteran Owned Small Business;
- 2) Small Business under NAICS 541611 (\$14M three year average revenue).

Addx Corporation is a CVE-verified Service Disabled Veteran Owned Small Business, which has recently updated our VA 0877 corporate information on the CVE VetBiz website. The second component of our claim as qualifying as a Service Disabled Veteran Owned Small Business under NAICS 541611 (\$14M three year average revenue) concerns our legacy qualification as a small business through GSA MOBIS. Since this procurement is through MOBIS, the small business certification is based on MOBIS contract versus subsequent task orders. Addx was under the \$14M NAICS 541611 three year average at the "time of written representation" when we renewed our MOBIS schedule for Option Period 1. Specifically, FAR 19.301-2(c) states that "a contractor must represent its size status in accordance with the size standard in effect at the time of its representation that corresponds to the NAICS code that was initially assigned to the contract." As *defined*, *Long-term contract* means a contract of more than five years in duration, including options. Recertification is not required except at the time of renewal or if the contractor is involved in an acquisition or merger. As previously identified, Addx was under the \$7M NAICS 541611 three year average requirement when we renewed our MOBIS schedule, and as such, is in compliance with these FAR provisions.

Notably, there is supporting precedence of this allowance on our Seaport-e and DHS PACTS

#### 10) GSA MOBIS Evergreen Clause

In support of this solicitation, Addx Corporation will contract through our GSA MOBIS GS-10F-0349N schedule and awarded BPA GS-33F-QMA12. This schedule is effective through April 16, 2013. We recently executed Refresh #18 that includes Clause I-FSS-163 (see below); **Option to Extend the Term of the Contract (Evergreen Clause)**. The clause reads:

**OPTION TO EXTEND THE TERM OF THE CONTRACT (EVERGREEN) (I-FSS-163) (APR 2000)**

(a) The Government may require continued performance of this contract for an additional 5 year period when it is determined that exercising the option is advantageous to the Government considering price and other factors. The option clause may not be exercised more than three times. When the option to extend the term of this contract is exercised the following conditions are applicable:

(1) It is determined that exercising the option is advantageous to the Government considering price and the other factors covered in (2 through 4 below).

(2) The Contractor's electronic catalog/pricelist has been received, approved, posted, and kept current on GSA Advantage!™ in accordance with clause I-FCI-600, Contract Price Lists.

(3) Performance has been acceptable under the contract.

(4) Subcontracting goals have been reviewed and approved.

(b) The Contracting Officer may exercise the option by providing a written notice to the Contractor within 30 days, unless otherwise noted, prior to the expiration of the contract or option.

(c) When the Government exercises its option to extend the term of this contract, prices in effect at the time the option is exercised will remain in effect during the option period, unless an adjustment is made in accordance with another contract clause (e.g., Economic Price Adjustment Clause or Price Reduction Clause).

Addx is currently in its first option period of three (base contract plus 3 five year options) and intends to seek renewal GSA MOBIS GS-10F-0349N for Option Period Two.

11) **Addx has no known conflicts of interest.**

## 4.0 Travel

Addx agrees to adhere to the General Services Administration (GSA) published travel rules and rates to include disaster specific amendments in accordance with the Federal Travel Regulations.

Reimbursable expenses shall be limited to the following:

a) Coach class air fare purchased at the lowest reasonably available rate and baggage fees, to include consultant deployment and demobilization travel;

b) Meals limited to the maximum current GSA per diem rate (receipts not required but will be supplied if HUD or other funding agencies require same)

- c) Lodging limited to the maximum current GSA per diem rate to include GSA- or HUD approved lodging waivers;
  
- d) Rotation airfare for consultant employees or approved sub-consultants/subcontractors will be reimbursed based on the consultant travel policy which limits each individual to a maximum of one (1) extended weekend trip every two (2) weeks, with up to one (1) trip up every quarter being a trip that can extend up to a week in duration; coach class air fare purchased at the lowest reasonably available rate plus baggage fees. Additional rotations or extensions of rotation duration may also be allowed outside of this rotation policy if deemed cost-effective or for client-recognized holidays, as long as they are approved by the State; and
  
- e) Mileage for Contractor privately owned vehicles at the current New Jersey rate of 31 cents per mile.

## 5.0 Addx GSA MOBIS Schedule



**GENERAL SERVICES ADMINISTRATION**  
**Mission Oriented Business Integrated Services (MOBIS)**

### **Addx Corporation**

Contract Number GS-10F-0349N

Federal Supply Service  
Authorized Federal Supply Schedule Price List  
Federal Supply Group: 874  
FSC Class: 8742

Contract Number: GS-10F-0349N

Contract Period: April 17, 2008 – April 16, 2013

Modification: 15/Schedule 874

Contractor: Addx Corporation  
4900 Seminary Road, Suite 570  
Alexandria, VA 22311-1878  
www.addxcorp.com

Authorized to bind the Firm:

William Millward, President & CEO  
(703) 933-7637, wmillward@addxcorp.com

Contract Administration Point of Contact:

Barbara Cass, Finance and Contracting  
(703) 933-7637, bcass@addxcorp.com

Business Size: Small  
Service Disabled Veteran Owned Small Business

DUNS Number: 039872622

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage!, a menu-driven database system. The Internet address for GSA Advantage! is: [www.gsaAdvantage.gov](http://www.gsaAdvantage.gov)

**Addx Corporation • Contract Number GS-10F-0349N**



1a. Awarded Special Items	SIN 874-1 Consulting Services SIN 874-2 Facilitation Services SIN 874-3 Survey Sciences Services SIN 874-4 Training Services SIN 874-5 Support Products SIN 874-7 Program Integration and Project Management
1b. Lowest Unit Price	Pricing List
1c. Labor Category Descriptions	Attached
2. Maximum Order	\$1,000,000
3. Minimum Order	\$100
4. Geographic Coverage	Worldwide
5. Points of Production	As required per task order
6. Discounts from list Price Statement of Net Price	Prices are net discounted
7. Quantity Discounts	Negotiated per order
8. Prompt Payment Terms	None
9a. Government Credit Card at or below micro-purchase threshold	Not Accepted
9b. Government Credit Card above micro-purchase threshold	Not Accepted
10. Foreign Items	None
11a. Time of Delivery	Negotiated per order
11b. Expedited Delivery	Negotiated per order
<i>Items available for expedited delivery are noted in this price list</i>	
11c. Overnight and 2-day delivery	Not Applicable
11d. Urgent Requirements	Negotiated per order
<i>In accordance with clause I-FSS-140-B Addx Corporation shall reply to any inquiry for accelerated delivery within 3 working days after receipt of inquiry. Any telephone inquiries or replies will be confirmed by Addx Corporation in writing.</i>	
12. FOB Point(s)	Destination
13a. Ordering Address(es)	Same as Contractor
13b. Ordering Procedures	
<i>For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs), and a sample BPA can be found at the GSA/FSS Schedule homepage: <a href="http://fss.gsa.gov/schedules">http://fss.gsa.gov/schedules</a></i>	
14. Payment Address	Addx Corporation 4900 Seminary Road, Ste 570 Alexandria, VA 22311
15. Warranty Provisions	Standard Commercial Warranty



16.	Export Packing Charges	Not Applicable
17.	Terms of Government Commercial Credit Card Acceptance	Not Applicable
18.	Terms and Conditions of Rental, Maintenance, Repair	Not Applicable
19.	Terms and Conditions of Installation	Not Applicable
20a.	Terms and Conditions of Repair Parts	Not Applicable
20b.	Terms and Conditions for any other services	Not Applicable
21.	List of Service and Distribution Points	Not Applicable
22.	List of Participating Dealers	Not Applicable
23.	Preventive Maintenance	Not Applicable
24a.	Special attributes such as environmental attributes	Not Applicable
24b.	Section 508 compliance information available on Electronic and Information Technology (EIT) supplies and services	Not Applicable
25.	Data Universal Number System (DUNS) Number	039872622
26.	Registration in Central Contractor Registration (CCR) Database	1XPA3
27.	Uncompensated Overtime	Not Applicable



## **Firm Overview**

Addx Corporation (www.addxcorp.com) is a principal provider of information and management sciences expertise through **management consulting, technology, and program management services**. As a Service-Disabled Veteran Owned Small Business (SDVOSB) founded in 2002 and headquartered in Alexandria VA, we have a solid history of helping federal agencies improve their processes in ways that increase efficiency, effectiveness, and productivity. For these reasons, Addx was a 2007 to 2010 Inc. 500 honoree and a 2007 to 2009 Washington Technology Fast 50 awardee.

### **Management Consulting Services**

#### **Strategic Human Capital Management**

##### **Services Include:**

- Strategic Human Capital Planning
- Workforce Planning and Analytics
- Workforce Development
- Organization Development and Transformation

#### **Advanced Training and Simulation**

##### **Services Include:**

- Concept of Operations Development
- Mission Planning and Rehearsal
- Domain Application Development

#### **Business Operations Management**

##### **Services Include:**

- Strategic and Transformation Planning
- Performance Management
- Business Process Management and Re-engineering
- Benchmarking & Best Practices Analysis

#### **Knowledge Management**

##### **Services Include:**

- Knowledge Enterprise Planning
- Build, Operate and Broker Knowledge System
- Learning Organization Development

#### **Studies and Analyses**

##### **Services Include:**

- Forecasting and Trend Analysis
- Program Performance Assessments
- Requirements & Capabilities Needs Analysis
- Cost Benefit Analysis and Financial Modeling
- Modeling and Simulation

### **Technology Services**

#### **Professional Services**

##### **Services Include:**

- Program Oversight & Management

- Systems Development Lifecycle Development (SDLC)
- Technical Risk Assessment
- Technology Selection & Implementation
- Enterprise Organization Transformation
- Standards Compliance Reviews
- IV&V
- Incident, Problem, and Change Management Implementation Support
- Surge Staffing for a variety of disciplines
- Records Management

### **Policy and Governance**

#### **Services Include:**

- Portfolio Management
- Capital Planning and Investment Control
- Service Level Agreement Management
- Sarbanes Oxley General Controls Compliance Support
- Operational Methods and Procedures
- Budget formulation and Exhibit 300 Support
- Records Management

### **Information Assurance**

#### **Services Include:**

- Enterprise Security Architecture Consulting
- Security Assessments
- Standards Compliance Reviews

### **Systems Engineering**

#### **Services Include:**

- Infrastructure Library (ITIL)
- Enterprise Architecture
- Rights Management
- Service Desk Design & Implementation

### **Program Management Services**

#### **Program Management Office Support**

#### **Services Include:**

- Program Planning and Execution
- Cost, Schedule, Scope, and Earned Value Management
- Quality Assurance and Surveillance
- Expert Action Officer Support
- Research and Administrative Support

### **Acquisition Management Support**

#### **Services Include:**

- Statement of Work Development
- Compliant Request for Proposal Preparation
- Contracts Negotiation
- Post Award Management



- IPT Facilitation

### **Financial Management Support Addx Corporation**

#### **Services Include:**

- Financial Strategy and Planning
- Financial Management and Execution
- Compliance, Monitoring & Evaluation

### **Professional Staffing**

#### **Services Include:**

- Position Descriptions Development
- Recruitment and Selection Support
- Hiring/Position Gap Support

Addx adheres to an established, proven, rigorous systems engineering approach, whether the task involves program management, technology or management consulting. We have dedicated PMI certified PMPs who deliver our services with the highest degree of customer satisfaction and quality.

The name Addx stands for excellence, responsiveness, and efficiency. Our focus and differentiation is to provide clients customized solutions through a combination of service excellence, responsive delivery, and efficient implementation. This combination aligns the right people, processes and supporting technologies to help our customers reduce risk, accomplish their mission requirements and achieve lasting results. Our mission is to help clients achieve substantial and lasting results in mission performance.

### **Our Guiding Principles**

**Excellence** - Our work is defined by deep service expertise conducted responsibly, reliably, and with lasting results our customers can count on.

**Responsiveness** - Our reputation is defined by the highest standards of professionalism and performance, adapting quickly and collaboratively to changing needs.

**Efficiency** - Our business is defined by our commitment to doing what is right by our clients through delivering best value in price and results.

### **Our Approach To Achieve Lasting Results**

Addx strives to provide the customer with a **complete solution**. To this end, in addition to our own talent pool, we team with other companies and subject matter experts to ensure all customer needs are met.



Our diverse range of knowledge and experience in MOBIS allows us to quickly and effectively understand customer needs from both a management and technical perspective. This foundation of knowledge and expertise enhances our reputation for successful contract execution. This reputation stems from strict adherence to a rigorous, structured set of management policies and procedures that fit the MOBIS objectives. Our project and program managers are formally and systematically trained to deliver repeatable and defined project management policies, procedures and quality plans applicable to every project. This repeatability of technical and project management equates to stability and superior performance efficiency on every project. Our processes also ensure an unprecedented customer insight and control of every project from kick-off to delivery.

Addx Corporation's management and quality focus is to achieve high customer satisfaction. Our philosophy of recruiting, assigning, and empowering the best available experts to support our customers and resolve their technical issues is key to the company's success in consistently delivering high quality products.

Addx strives to provide this superior customer service all the while maintaining effective cost and schedule controls. Addx assigns specific roles and responsibilities for each Addx Team member assigned to the project to ensure efficient execution of project tasks and the generation of high quality products.

Addx Corporation employs technical experts whose skills and experience match directly to the MOBIS task requirements. We staff MOBIS contractual task orders using the best available talent. Our flexibility allows us to respond to emergent needs and new task areas quickly and efficiently. We understand the importance of, and are committed to, providing quality service and customer satisfaction.

## **MOBIS SERVICES AND PRODUCTS**

### **SIN 874-1, 874-1RC: CONSULTING SERVICES**

Addx provides expert advice, assistance, guidance or counseling in support of agencies' mission oriented business functions. This may include: Management or strategy consulting; program planning, audits and evaluations; studies, analyses, scenarios, and reports relating to mission-oriented business programs or initiatives, such as defense studies, tabletop exercises or scenario simulations; educational studies, regulatory studies, economic studies, and preparedness studies; executive/management coaching services; customized training as part of a consulting engagement; policy and regulatory development and review; expert witness services in support of litigation, claims, or other formal cases, and advisory and assistance services in accordance with FAR 37.203(b). Examples of consultation include but are not limited to: information and decision sciences consulting, strategic, business and action planning; high performance work; process and productivity improvement, systems alignment; leadership systems; organizational assessments; cycle time; performance measures and indicators; program audits, evaluations, and customized training.

### **SIN 874-2, 874-2RC: FACILITATION SERVICES**

Addx provides facilitation and related decision support services to agencies engaged in collaboration efforts, working groups, or integrated product, process, or self-directed teams. Agencies bringing together diverse teams and/or groups with common and divergent interests may require a neutral party to assist them in: the use of problem solving techniques; defining and refining the agenda; debriefing and overall meeting planning; resolving disputes, disagreements, and divergent views; logistical meeting/conference support when performing technical facilitation; convening and leading large and small group briefings and discussions; providing a draft for the permanent record; recording discussion content and enabling focused decision-making; preparing draft and final reports for dissemination.

### **SIN 874-3, 874-3RC: SURVEY SERVICE**

Addx provides expert consultation, assistance, and deliverables associated with all aspects of surveying within the context of MOBIS. Addx manages or performs all phases of the survey process which is not limited to: planning survey design; sampling, survey development; pretest/pilot surveying; defining and refining the agenda; survey database administration; assessing reliability and validity of data; determining proper survey data collection methodology; administering surveys using various types of data collection methods; and analyses of quantitative and qualitative survey data. Addx manages or produces reports not limited to: description and summary of results with associated graphs, charts, and tables; description of data collection and survey administration methods; discussion of sample characteristics and the representative nature of data; analysis of non-response; and briefings of results to include discussion of recommendations and potential follow-up actions.

### **SIN 874-4: TRAINING SERVICES**

Addx manages and/or provides training services in areas including but not limited to mentoring, coaching and professional development. Addx utilizes professionally developed products,

including off-the-shelf training packages, to meet agency objectives and needs related to business services. Training services offered include and is not limited to: executive leadership, acquisition, Lean Six Sigma, management, supervision, teamwork, team building, customer service, ISO 9000, process improvement, performance management, performance measurement; statistical process control; performance problem-solving; business process reengineering; quality management; change management; strategic planning; and benchmarking.

#### **SIN 874-5: SUPPORT PRODUCTS**

Addx provides support products in conjunction with support of services offered in SINS 1, 2, 3, 4 and 7. Support products may include, but are not limited to: workbooks, training manuals, slides, videotapes, CDs, DVDs, software programs, etc.

#### **SIN 874-6, 874-6RC: ACQUISITION MANAGEMENT SUPPORT**

Addx Corporation provides support to agencies in conducting federal acquisition management activities, as follows: Acquisition planning assistance; developing acquisition documents, including quality assurance surveillance plans, statements of work, synopses, and solicitations; expert assistance in evaluating proposals; contract administration services; and competitive sourcing support, including OMB Circular A-76 studies, strategic sourcing studies, privatization studies, public-private partnerships, and Federal Activities Inventory Reform (FAIR) Act studies.

#### **SIN 874-7, 874-7RC: PROGRAM AND PROJECT MANAGEMENT SERVICES**

Addx Corporation's program integration and project management services provide assistance to agencies in planning, initiating, managing, executing, and closing out mission-oriented business programs and projects. Services include: Project leadership and communications with stakeholders; project planning and scheduling; earned value management support; project management, including performance monitoring and measurement; reporting and documentation associated with project/program objectives; stakeholder briefings, participation in required meetings, and related project support services; program integration services; project close-out services; subcontractor management, Contractor Team Agreements (CTAs), and rapid personnel staffing.

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## ***ADDX CORPORATION LABOR CATEGORY DESCRIPTIONS***

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### **Senior Executive Consultant:**

#### **Minimum Experience:**

- MA/MS plus more than 20 years direct experience

#### **Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 12 years direct experience
- BA/BS plus more than 24 years direct experience

Experience includes: Management at an executive level, development and integration of global business solutions, creation of competitive strategies and management of multiple client engagements. A Senior Executive Consultant works with senior client staff to monitor quality and risk. A Senior Executive Consultant identifies and addresses potential project and resource issues that will affect services and products. A Senior Executive Consultant is skilled at reviewing, designing and implementing strategic plans and aligning organizational and infrastructure designs with business objectives and goals. A Senior Executive Consultant is highly skilled at scoping the bona fide requirements, organizing, coordinating acquisition management activities at program level, the contracting office, the financial organization and Agency support services offices such that the Agency can successfully specify, schedule, produce, execute and close enterprise wide/major systems product and services acquisition programs and their attendant portfolio of supporting procurement projects.

**Functional Responsibility:** Oversees and manages projects and programs. Provides specialized knowledge in specific, functional, or operational areas of analysis methods or disciplines. Gathers and organizes information on problems or procedures including current operating procedures. Analyzes data, develops information, and evaluates available solutions or alternate methods of proceeding. Coordinates with customers and trains users to ensure smooth implementation and functional performance of new systems, procedures, or organizations. Develops and implements operational tests and assessments, develops and maintains functional and operating documentation. Plans study of work problems and procedures, such as organizational change, communications, information flow, decision making processes, control processes, operational effectiveness, or cost analyses. Organizes and documents study findings and will prepare recommendations for new system implementation, procedures, or organizational changes, has specialized experience in facilitation, training, methodology development and evaluation, process re-engineering across all phases, identifying best practices, change management, business management techniques, organizational development, activity and data modeling, or information system development methods and practices. Applies process improvement and re-engineering methodologies and principles to conduct process modernization projects. Duties include developing modern business methods, identifying best practices, and creating and assessing performance measurements. Provides group facilitation, interviewing, and training, and provides additional forms of knowledge transfer. Manages the acquisition planning, acquisition and contract administration of complex major projects and programs. The projects and programs may require numerous contracts, some of which usually exceed \$50 million. Duties include providing acquisition planning assistance, executive oversight and

control over the development of the full range of acquisition documents, providing expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Individual possesses technical qualifications equivalent to those possessed by a tenured professor at a major university. Person is responsible for maintaining technical excellence within the company.

**Executive Consultant:**

**Minimum Experience:**

- MA/MS plus more than 18 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 10 years direct experience
- BA/BS plus more than 22 years direct experience

Experience includes: Management at an executive level, development and integration of global business solutions, creation of competitive strategies and management of multiple client engagements. An Executive Consultant works with senior client staff to monitor quality and risk. An Executive Consultant identifies and addresses potential project and resource issues that will affect services and products. An Executive Consultant is skilled at reviewing, designing and implementing strategic plans and aligning organizational and infrastructure designs with business objectives and goals. An Executive Consultant is skilled at organizing, and coordinating at program level contracting, financial and support services offices for the purposes of successfully specifying, acquisition schedules, produce, execute and close enterprise wide and major systems level product and services acquisition programs and their attendant portfolio of supporting procurement projects.

**Functional Responsibility:** Plans, organizes, directs, and conducts consulting, survey, or training tasks in problem areas of extensive scope and complexity. The problems are difficult to define, and may require novel approaches and the use of sophisticated techniques. Has extensive technical responsibility for interpreting, organizing, executing, and coordinating assignments, including the direction of other staff. Keeps abreast of new MOBIS-related methodologies, data bases, and tools. Makes decisions, which are considered authoritative and which demonstrate mature judgment in anticipating and solving complex problems. Within defined objectives, but with considerable latitude, performs in a professional position requiring in-depth knowledge. Individual is capable of independent, complex analysis, concept formulation and new method identification, and may serve as a prime point of contact for clients. Provides expert acquisition planning assistance, executive oversight and control over the development of the full range of acquisition documents, while providing expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Plans, organizes, and directs a staff that provides acquisition planning, acquisition and contract administration in support of contracts for major projects and programs. The contracts are multimillion dollar value contracts but usually exceed \$50 million.

**Principal Consultant II:**

**Minimum Experience:**

- MA/MS plus more than 16 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 8 years direct experience
- BA/BS plus more than 20 years direct experience

**Functional Responsibility:** Plans, organizes, directs, and conducts consulting, survey, or training tasks in problem areas of extensive scope and complexity. The problems are difficult to define, and may require novel approaches and the use of sophisticated techniques. Has extensive technical responsibility for interpreting, organizing, executing, and coordinating assignments, including the direction of other staff. Keeps abreast of new MOBIS-related methodologies, data bases, and tools. Makes decisions, which are considered authoritative and which demonstrate mature judgment in anticipating and solving complex problems. Within defined objectives, but with considerable latitude, performs in a professional position requiring in-depth knowledge. Individual is capable of independent, complex analysis, concept formulation and new method identification, and may serve as a prime point of contact for clients. Plans, organizes, and directs a staff that provides acquisition planning, acquisition and contract administration in support of contracts for major projects and programs. The contracts are multimillion dollar value contracts but usually exceed \$50 million. Organizes, and coordinates at program level contracting, financial and support services offices for the purposes of successfully specifying, acquisition schedules, produce, execute and close enterprise wide and major systems level product and services acquisition programs and their attendant portfolio of supporting procurement projects. Provides acquisition planning assistance, oversight and control over the development of complex acquisition documents, provides expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support.

**Principal Consultant I:**

**Minimum Experience:**

- MA/MS plus more than 14 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 7 years direct experience
- BA/BS plus more than 18 years direct experience

**Functional Responsibility:** Plans, organizes, directs, and conducts consulting, survey, or training tasks in problem areas of extensive scope and complexity. The problems are difficult to define, and may require novel approaches and the use of sophisticated techniques. Has extensive technical responsibility for interpreting, organizing, executing, and coordinating assignments, including the direction of other staff. Keeps abreast of new MOBIS-related methodologies, data bases, and tools. Makes decisions, which are considered authoritative and which demonstrate mature judgment in anticipating and solving complex problems. Within defined objectives, but with considerable latitude, performs in a professional position requiring in-depth knowledge. Individual is capable of independent, complex analysis, concept formulation and new method identification, and may serve as a prime point of contact for clients. A Principal Consultant I is skilled at organizing, and coordinating at major project level contracting, financial and support services offices for the purposes of successfully specifying, acquisition schedules, produce,

execute and close enterprise wide and major systems level product and services acquisition programs and their attendant portfolio of supporting work packages and task assignments. Provides acquisition planning assistance, oversight and control over the development of complex acquisition documents, provides expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Plans organizes and directs a staff that provides acquisition planning, acquisition and contract administration in support of contracts for major projects and programs. The contracts are multimillion dollar value contracts but usually exceed \$50 million.

**Senior Management Consultant II:**

**Minimum Experience:**

- MA/MS plus more than 12 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 6 years direct experience
- BA/BS plus more than 16 years direct experience
- HS/GED and at least 26 years direct experience in a related field / industry

**Functional Responsibility:** Designs and implements complex organizational change that addresses strategic, structural, process, and behavioral factors. Develops strategic plans, business plans, organizational assessments, cultural change programs, and business process improvements. Assists governmental agencies in implementing the Government Performance and Results Act in strategic planning, and the executive order directed towards labor-management partnership. Has experience in facilitation, process re-engineering across all phases, identifying best practices, change management, business management techniques, organizational development, activity and data modeling, or information system development methods and practices. Applies process improvement and re-engineering methodologies and principles to conduct process modernization projects. As senior company expert within a technical field, serves as project manager in complex and mission critical client assignments. Applies software, hardware, and standards information technology skills in the analysis, specification, development, integration, and acquisition of logistical systems of information management applications. Ensures these systems and applications are compliant with standards for open systems architectures, reference models, and profiles of standards as they apply to the implementation and specification of information management solutions on the application platform, across the application program interface, and the external environment/software application. Performs analysis and validation of reusable software/hardware components to ensure the integration of these components into interoperable information management designs for logistical systems. Evaluates analytically and systematically problems of workflow, organization, and planning and develops appropriate corrective action. Applies business process improvement practices to re-engineer methodologies/principles and business process modernization projects. Applies activity and data modeling, transaction flow analysis, internal control and risk analysis and modern business methods and performance measurement techniques. A Senior Management Consultant II is skilled at coordinating major project level contracting and support services for the purposes of specifying acquisition schedules, production, execution and close-out of enterprise specific acquisition projects. Work includes attendant work

packages and task assignments portfolio. Provides acquisition planning assistance, oversight and control over the development of acquisition documents, provides expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Designs and implements the acquisition planning, acquisition and contract administration support of contracts for projects and programs. This may include major projects and programs. The contracts are multimillion dollar value contracts and may exceed \$50 million. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

**Senior Management Consultant I:**

**Minimum Experience:**

- MA/MS plus more than 10 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 5 years direct experience
- BA/BS plus more than 15 years direct experience
- HS/GED and at least 25 years direct experience in a related field / industry

**Functional Responsibility:** Designs and implements complex organizational change that addresses strategic, structural, process, and behavioral factors. Develops strategic plans, business plans, organizational assessments, cultural change programs, and business process improvements. Assists governmental agencies in implementing the Government Performance and Results Act in strategic planning, and the executive order directed towards labor-management partnership. Has experience in facilitation, process re-engineering across all phases, identifying best practices, change management, business management techniques, organizational development, activity and data modeling, or information system development methods and practices. Applies process improvement and re-engineering methodologies and principles to conduct process modernization projects. As senior company expert within a technical field, serves as project manager in complex and mission critical client assignments. Applies software, hardware, and standards information technology skills in the analysis, specification, development, integration, and acquisition of logistical systems of information management applications. Ensures these systems and applications are compliant with standards for open systems architectures, reference models, and profiles of standards as they apply to the implementation and specification of information management solutions on the application platform, across the application program interface, and the external environment/software application. Performs analysis and validation of reusable software/hardware components to ensure the integration of these components into interoperable information management designs for logistical systems. Evaluates analytically and systematically problems of workflow, organization, and planning and develops appropriate corrective action. Applies business process improvement practices to re-engineer methodologies/principles and business process modernization projects. Applies activity and data modeling, transaction flow analysis, internal control and risk analysis and modern business methods and performance measurement techniques. A Senior Management Consultant I is skilled at coordinating major project level contracting and support services for the purposes of specifying acquisition schedules, production,

execution and close-out of enterprise specific acquisition projects. Work includes attendant work packages and task assignments portfolio. Provides acquisition planning assistance, oversight and control over the development of acquisition documents, provides expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Designs and implements the acquisition planning, acquisition and contract administration support of contracts for projects and programs. This may include major projects and programs. The contracts are multimillion dollar value contracts and may exceed \$50 million. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

**Management Consultant II:**

**Minimum Experience:**

- MA/MS plus more than 10 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 2 years direct experience
- BA/BS plus more than 12 years direct experience
- HS/GED and at least 22 years direct experience in a related field / industry

**Functional Responsibility:** Within broad objectives, performs in a professional position requiring high level specialized knowledge and experience. Demonstrates ability to analyze complex problems, research and synthesize data, and propose unique solutions or alternatives. Individual is a recognized leader in one or more disciplines, and may serve as a prime point of contact for clients. Performs studies and reviews of management and organizational structures to evaluate performance relative to business objectives. Advises on business strategies and realignment issues to focus on most beneficial objectives. Provides strategic advice and plans for systematic downsizing, outsourcing, and privatization. Addresses issues affecting management and workforce to improve productivity while reengineering the organization. Provides assistance in the evaluation, auditor service, and implementation support of quality standards to achieve certification. Provides leadership in government and industry meetings, briefings, and forums to facilitate the exchange of ideas and concepts. A Management Consultant II is skilled at coordinating at the large project level contracting support services for the purposes of successfully specifying acquisition schedules, production, execution and close-out of enterprise specific services and systems product and associated services acquisition projects and their attendant portfolio of work packages and task assignments. Provides acquisition planning assistance, oversight and control over the development and production of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Performs the acquisition planning, acquisition and contract administration functions in support of contracts for projects and programs and obtains next higher level approval/concurrence of actions when required. The range of support required may be from simplified acquisition contracts to multimillion dollar value contracts. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

## **Management Consultant I:**

### **Minimum Experience:**

- MA/MS plus more than 8 years direct experience

### **Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 1 years direct experience
- BA/BS plus more than 10 years direct experience
- HS/GED and at least 20 years direct experience in a related field / industry

**Functional Responsibility:** Within broad objectives, performs in a professional position requiring high level specialized knowledge and experience. Demonstrates ability to analyze complex problems, research and synthesize data, and propose unique solutions or alternatives. Individual is a recognized leader in one or more disciplines, and may serve as a prime point of contact for clients. Performs studies and reviews of management and organizational structures to evaluate performance relative to business objectives. Advises on business strategies and realignment issues to focus on most beneficial objectives. Provides strategic advice and plans for systematic downsizing, outsourcing, and privatization. Addresses issues affecting management and workforce to improve productivity while reengineering the organization. Provides assistance in the evaluation, auditor service, and implementation support of quality standards to achieve certification. Provides leadership in government and industry meetings, briefings, and forums to facilitate the exchange of ideas and concepts. A Management Consultant I is skilled at coordinating at the project level contracting support services for the purposes of successfully specifying acquisition schedules, production, execution and close-out of enterprise specific services and systems product and associated services acquisition projects and their attendant portfolio of work packages and task assignments. Provides acquisition planning assistance, oversight and control over the development and production of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Performs the acquisition planning, acquisition and contract administration functions in support of contracts for projects and programs and obtains next higher level approval/concurrence of actions when required. The range of support required may be from simplified acquisition contracts to multimillion dollar value contracts. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

## **Consultant II:**

### **Minimum Experience:**

- MA/MS plus more than 5 years direct experience

### **Acceptable Substitution Experience:**

- BA/BS plus more than 8 years direct experience
- HS/GED and at least 14 years direct experience in a related field / industry

**Functional Responsibility:** Applies process improvement and reengineering methodologies and principles to conduct process modernization projects. Duties include business activity and data modeling, developing modern business methods, identifying best practices, and creating and

assessing performance measurements. Provides group facilitation, interviewing, training, and provides additional forms of knowledge transfer. Works within general guidelines on broadly defined projects. Individual requires originality, with some latitude for un-reviewed decision making, and frequent client contact is routine. A Consultant II is skilled at coordinating at the project level contracting support services for the purposes of specifying acquisition schedules, production, execution and close-out of enterprise specific services and systems product and associated services acquisition projects and their attendant portfolio of work packages. Provides acquisition planning assistance, oversight and control over the development and production of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Performs the acquisition planning, acquisition and contract administration functions in support of contracts from simplified acquisition to multimillion dollar value and obtains next higher level approval/concurrence of actions when required. May occasionally require guidance from a more senior level staff member. Also, under the direction of a more senior staff member, performs these functions in a support role for more complex contacts exceeding \$50 million. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

**Consultant I:**

**Minimum Experience:**

- MA/MS plus more than 4 years direct experience

**Acceptable Substitution Experience:**

- BA/BS plus more than 6 years direct experience
- HS/GED and at least 12 years direct experience in a related field / industry

**Functional Responsibility:** Applies process improvement and reengineering methodologies and principles to conduct process modernization projects. Duties include business activity and data modeling, developing modern business methods, identifying best practices, and creating and assessing performance measurements. Provides group facilitation, interviewing, training, and provides additional forms of knowledge transfer. Works within general guidelines on broadly defined projects. Individual requires originality, with some latitude for un-reviewed decision making, and frequent client contact is routine. A Consultant I is skilled at the project level in performing contracting support services for the purposes of specifying acquisition schedules, production, execution and close-out of enterprise specific services and systems product and associated services acquisition projects and their attendant work packages. Provides acquisition planning assistance, oversight and control over the development and production of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Performs the acquisition planning, acquisition and contract administration functions in support of contracts from simplified acquisition to multimillion dollar value and obtains next higher level approval/concurrence of actions when required. May occasionally require guidance from a more senior level staff member. Also, under the direction of a more senior staff member, performs these functions in a support role for more complex contacts exceeding \$50 million. Performs all

reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

**Associate Consultant II:**

**Minimum Experience:**

- BA/BS plus more than 3 years direct experience

**Acceptable Substitution Experience:**

- Associates degree plus more than 4 years direct experience.
- HS/GED and at least 9 years direct experience in a related field / industry

**Functional Responsibility:** Performs word processing, financial, database, and other software functions; prepares forms, correspondence, and other documents. Create and assess performance measures. An Associate Consultant II performs contracting support services for the purposes of documenting acquisition schedules, production schedules and for providing close-out support for enterprise specific services and systems product and associated services acquisition projects and their attendant work packages. Provides acquisition planning assistance and production services supporting the development of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Supports the acquisition and contract administration functions. Assembles the Request For Proposal, and prepares for issuance. Organizes pre-solicitation documents, contract documents and associated acquisition correspondence and prepares for file. Prepares the file folders and files all acquisition documents.

**Associate Consultant I:**

**Minimum Experience:**

- BA/BS plus more than 2 years direct experience

**Acceptable Substitution Experience:**

- Associates degree plus more than 3 years direct experience.
- HS/GED and at least 8 years direct experience in a related field / industry

**Functional Responsibility:** Perform general secretarial, administrative and office duties such as ordering supplies, maintaining records management systems. Perform basic statistical and budget work. Manage and maintain calendars and schedules and prepare invoices, reports, memos, letters, travel vouchers, and other documents using word processing, spreadsheet, database, and/or presentation software. Read and analyze incoming memos, submissions, and reports in order to determine significance and plan distribution. Open, sort, and distribute incoming correspondence, faxes and email as well as file and retrieve documents, records and reports. Prepare responses to correspondence containing routine inquiries. Maintain library documents. Communicate effectively with all levels of people within and outside the organization. Greet visitors, check clearances and determine access to individuals and groups. An Associate Consultant I performs contracting support services for the purposes of documenting acquisition schedules, production schedules and for providing close-out support for enterprise specific services and systems product and associated services acquisition projects and their attendant work packages. Provides acquisition planning assistance and production services supporting the

development of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Has general familiarity with the acquisition process, forms and purpose so support can be provided to the acquisition staff with a minimum of guidance. Makes data entry into contract management data base systems.

**Administrator II:**

**Minimum Experience:**

- Associates degree plus 1 year experience

**Acceptable Substitution Experience:**

- HS Diploma plus 3 years direct experience

**Functional Responsibility:** Perform general secretarial, administrative and office duties such as ordering supplies, maintaining records management systems. Perform basic statistical and budget work. Manage and maintain calendars and schedules and prepare invoices, reports, memos, letters, travel vouchers, and other documents using word processing, spreadsheet, database, and/or presentation software. Read and analyze incoming memos, submissions, and reports in order to determine significance and plan distribution. Open, sort, and distribute incoming correspondence, faxes and email as well as file and retrieve documents, records and reports. Prepare responses to correspondence containing routine inquiries. Maintain library documents. Communicate effectively with all levels of people within and outside the organization. Greet visitors, check clearances and determine access to individuals and groups. An Administrator II provides contracting support services for the purposes of producing Federal Procurement documents at the direction of others, recording the accomplishment of acquisition schedule milestones, procurement production schedules and milestones and provides contract close-out support services and products. . Provides acquisition assistance for the production of acquisition documents, provides assistance in documenting the evaluation of proposals, provides contract/order administrative support services support Has general familiarity with the acquisition process, forms and purpose so support can be provided to the acquisition staff with a minimum of guidance. Makes data entry into contract management data base systems.

**Administrator I:**

**Minimum Experience:**

- Associates degree

**Acceptable Substitution Experience:**

- HS Diploma plus 1 year direct experience

**Functional Responsibility:** Perform general secretarial, administrative and office duties such as ordering supplies, maintaining records management systems. Perform basic statistical and budget work. Manage and maintain calendars and schedules and prepare invoices, reports, memos, letters, travel vouchers, and other documents using word processing, spreadsheet, database, and/or presentation software. Read and analyze incoming memos, submissions, and reports in order to determine significance and plan distribution. Open, sort, and distribute incoming correspondence, faxes and email as well as file and retrieve documents, records and reports.



Prepare responses to correspondence containing routine inquiries. Maintain library documents. Communicate effectively with all levels of people within and outside the organization. Greet visitors, check clearances and determine access to individuals and groups. An Administrator I provides contracting support services for the purposes of producing Federal Procurement documents at the direction of others, documenting acquisition schedule milestones, procurement production schedules and milestones and for providing contract close-out support services and products. Provides acquisition assistance for the production of acquisition documents, provides contract administrative support services and competitive sourcing staff support. Has general familiarity with the acquisition process, forms and purpose so support can be provided to the acquisition staff with a minimum of guidance. Makes data entry into contract management data base systems.



**MOBIS Contract # GS-10F-0349N  
 Addx Corporation Labor Rates  
 April 17, 2008 – April 16, 2013  
 Includes 0.75% IFF**

<u>Labor Categories</u>	<u>Government Hourly Rates</u>	<u>Government Daily Rates</u>
Senior Executive Consultant	\$272.68	\$2,181.44
Executive Consultant	\$198.51	\$1,588.11
Principal Consultant II	\$180.42	\$1,443.39
Principal Consultant I	\$169.50	\$1,355.99
Sr. Management Consultant II	\$163.60	\$1,308.81
Sr. Management Consultant I	\$136.69	\$1,093.54
Management Consultant II	\$125.75	\$1,005.98
Management Consultant I	\$114.53	\$916.20
Consultant II	\$98.42	\$787.35
Consultant I	\$86.16	\$689.32
Associate Consultant II	\$71.08	\$568.64
Associate Consultant I	\$63.80	\$510.43
Administrator II	\$49.21	\$393.67
Administrator I	\$38.27	\$306.19

**SIN 874-4 and 874-4RC**

<b>Training Course</b>	<b>Price</b>
Continuity Management (Per Student)	\$3,237.47

**SIN 874-5 and 874-5RC**

<b>Support Product</b>	<b>Price</b>
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Continuity Management Workbook

\$80.94



**MOBIS Contract # GS-10F-0349N**

**Addx Corporation Office Locations**

**Washington, DC Metropolitan Area:**

**4900 Seminary Road**

**Suite 570**

**Alexandria, VA 22311**

**Main: (703) 933-7637**

**Fax:**



## State of New Jersey Division of Purchase and Property E-Buy RFQ # 768892S

### Volume II: Price Schedule

Submitted to:

**Damian Fantini**

[Damian.fantini@treas.state.nj.us](mailto:Damian.fantini@treas.state.nj.us)

Submitted By:

**Addx Corporation**

4900 Seminary Road, Suite 570

Alexandria, VA 22311

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

POC: Bill Millward

President & CEO

[wmillward@addxcorp.com](mailto:wmillward@addxcorp.com)

(o) 703.933.7637 x 202 (f) XXXXXXXXXX



**April 8, 2013**

#### *Notice of Restriction*

*This response to the Government's Request for Quote includes data that shall not be disclosed outside of the Government and shall not be duplicated, used, or disclosed in whole or in part for any purpose other than to evaluate this response. If, however, a contract is awarded to this Offeror as a result of or in connection with the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from other sources without restriction. The data subject to this restriction are contained in this entire proposal.*



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## 1.0 Introduction

Addx Corporation (Addx) provides the following quote in response to the State of New Jersey, Division of Purchase and Property, Request for Quote (RFQ) to provide Program and Process Management Auditing, Financial Auditing and Grant Management, and Integrity Monitoring/Anti-Fraud Services for Disaster Recovery Assistance (Hurricane Sandy) Blanket Purchase Agreement (BPA) No. RFQ768892S (“the BPA”). Addx’ proposed pricing, which has been provided in Section 2.0 of this submission, is based on a thorough review of the requirements and the rates established under the Addx MOBIS GSA schedule.

Addx acknowledges the initial e-buy posting on 3/18/2013 under RFQ768892S, as well as Modification 1 posted 3/18/2013, Modification 2 posted 3/21/2013, Modification 3 posted 3/27/2013, Modification 4 posted 3/28/2013, Modification 5 posted 4/1/2013, Modification 6 posted 4/2/2013, Modification 7 posted 4/8/2013, and Modification 8 posted 4/4/2013.

## 2.0 Price Schedule

### 2.1 Price Labor Categories

Table 2.1.1. below details the skill classifications as identified by the State of New Jersey and the Addx GSA MOBIS labor category mapped as most similar in description and job requirements. The Addx GSA MOBIS labor categories are used as the basis for pricing.

<b>RFQ Skill Classification</b>	<b>GSA MOBIS Labor Category</b>
Partner/Principal	Executive Consultant
Program Manager	Sr. Management Consultant II
Project Manager	Sr. Management Consultant I
Senior Consultant	Management Consultant II
Consultant	Management Consultant I
Associate /Staff	Consultant II
Subject Matter Expert	Management Consultant II
Administrative Support	Associate Consultant II

Table 2.1.1. State of New Jersey skill classifications and corresponding Addx Corporation GSA MOBIS Labor Category.

### 2.2 Price Schedule

Based on the information provided in the RFQ, and to provide the State of New Jersey with the best value solution, Addx has proposed an up to 5% discounted pricing on some of the staff classifications. This discount is based upon our examination of the stated requirements and our ability to meet these needs efficiently with the least amount of cost.



<b>Line #</b>	<b>STAFF CLASSIFICATION</b>	<b>YEAR 1 HOURLY RATE</b>	<b>YEAR 2 HOURLY RATE</b>	<b>YEAR 3 HOURLY RATE</b>
17	Partner/Principal/Director	\$195.00	\$200.85	\$206.88
18	Program Manager	\$155.00	\$159.65	\$164.44
19	Project Manager	\$130.00	\$133.90	\$137.92
20	Subject Matter Expert	\$122.00	\$125.66	\$129.43
21	Senior Consultant	\$122.00	\$125.66	\$129.43
22	Consultant	\$111.00	\$114.33	\$117.76
23	Associate/Staff	\$96.00	\$98.88	\$101.85
24	Administrative Support Staff	\$71.00	\$73.13	\$75.32

### 3.0 Assumptions, Terms and Conditions

- 1) Addx would like to clarify that regarding litigation services, it is our understanding that Addx Corporation, as well as subcontractor, staff and documentation related to services (i.e. notes, work papers, etc.) provided to the State of New Jersey, will be made available. However, all legal support and respective labor will be provided by the state. Addx Corporation is not responsible for providing or supplying funding for, legal representation or defense of the State or any of its political subdivisions at its own cost.
- 2) Addx agrees to solicitation requirements, the State of New Jersey's Standard Terms and Conditions, provisions and clauses.
- 3) Price is good for 90 days.
- 4) Addx personnel abide by NJ Standards of Conduct and Restrictions. These expectations are made clear upon hiring and through periodic refresher training.
- 5) Addx provides highly experienced personnel at competitively reasonable rates. All personnel are exempt from the Wage Determination Act as they are considered either professional employees as defined in 29 C.F.R. Part 541 or computer employees who satisfy the computer professional exemption.
- 6) In the absence of specific acceptance criteria, reasonable professional standards shall apply.
- 7) All submitted pricing is currently on our GSA GS-10F-0349N MOBIS schedule. Discounts have been applied to the applicable labor categories.
- 8) Labor hour pricing is separate and fixed, and includes all the requisite cost build components. These fixed hourly rates apply to Addx and our subcontractors. Addx has no subsidiaries, affiliates, or an offeror under common control.
- 9) **Socioeconomic Status and Qualification as a small business under the 541611 NAICS.** For the purpose of this GSA MOBIS procurement, Addx Corporation qualifies as a Service Disabled Veteran Owned Small Business under NAICS 541611 (\$14M three year average revenue).

There are two components associated with this claim, which shall be discussed below:

- 1) Services Disabled Veteran Owned Small Business;
- 2) Small Business under NAICS 541611 (\$14M three year average revenue).

Addx Corporation is a CVE-verified Service Disabled Veteran Owned Small Business, which has recently updated our VA 0877 corporate information on the CVE VetBiz website. The second component of our claim as qualifying as a Service Disabled Veteran Owned Small Business under NAICS 541611 (\$14M three year average revenue) concerns our legacy qualification as a small business through GSA MOBIS. Since this procurement is through MOBIS, the small business certification is based on MOBIS contract versus subsequent task orders. Addx was under the \$14M NAICS 541611 three year average at the "time of written representation" when we renewed our MOBIS schedule for Option Period 1. Specifically, FAR 19.301-2(c) states that "a contractor must represent its size status in accordance with the size standard in effect at the time of its representation that corresponds to the NAICS code that was initially assigned to the contract." As *defined*, *Long-term contract* means a contract of more than five years in duration, including options. Recertification is not required except at the time of renewal or if the contractor is involved in an acquisition or merger. As previously identified, Addx was under the \$7M NAICS 541611 three year average requirement when we renewed our MOBIS schedule, and as such, is in compliance with these FAR provisions.

Notably, there is supporting precedence of this allowance on our Seaport-e and DHS PACTS

#### 10) GSA MOBIS Evergreen Clause

In support of this solicitation, Addx Corporation will contract through our GSA MOBIS GS-10F-0349N schedule and awarded BPA GS-33F-QMA12. This schedule is effective through April 16, 2013. We recently executed Refresh #18 that includes Clause I-FSS-163 (see below); **Option to Extend the Term of the Contract (Evergreen Clause)**. The clause reads:

**OPTION TO EXTEND THE TERM OF THE CONTRACT (EVERGREEN) (I-FSS-163) (APR 2000)**

(a) The Government may require continued performance of this contract for an additional 5 year period when it is determined that exercising the option is advantageous to the Government considering price and other factors. The option clause may not be exercised more than three times. When the option to extend the term of this contract is exercised the following conditions are applicable:

(1) It is determined that exercising the option is advantageous to the Government considering price and the other factors covered in (2 through 4 below).

(2) The Contractor's electronic catalog/pricelist has been received, approved, posted, and kept current on GSA Advantage!™ in accordance with clause I-FCI-600, Contract Price Lists.

(3) Performance has been acceptable under the contract.

(4) Subcontracting goals have been reviewed and approved.

(b) The Contracting Officer may exercise the option by providing a written notice to the Contractor within 30 days, unless otherwise noted, prior to the expiration of the contract or option.

(c) When the Government exercises its option to extend the term of this contract, prices in effect at the time the option is exercised will remain in effect during the option period, unless an adjustment is made in accordance with another contract clause (e.g., Economic Price Adjustment Clause or Price Reduction Clause).

Addx is currently in its first option period of three (base contract plus 3 five year options) and intends to seek renewal GSA MOBIS GS-10F-0349N for Option Period Two.

11) **Addx has no known conflicts of interest.**

## 4.0 Travel

Addx agrees to adhere to the General Services Administration (GSA) published travel rules and rates to include disaster specific amendments in accordance with the Federal Travel Regulations.

Reimbursable expenses shall be limited to the following:

a) Coach class air fare purchased at the lowest reasonably available rate and baggage fees, to include consultant deployment and demobilization travel;

b) Meals limited to the maximum current GSA per diem rate (receipts not required but will be supplied if HUD or other funding agencies require same)

- c) Lodging limited to the maximum current GSA per diem rate to include GSA- or HUD approved lodging waivers;
- d) Rotation airfare for consultant employees or approved sub-consultants/subcontractors will be reimbursed based on the consultant travel policy which limits each individual to a maximum of one (1) extended weekend trip every two (2) weeks, with up to one (1) trip up every quarter being a trip that can extend up to a week in duration; coach class air fare purchased at the lowest reasonably available rate plus baggage fees. Additional rotations or extensions of rotation duration may also be allowed outside of this rotation policy if deemed cost-effective or for client-recognized holidays, as long as they are approved by the State; and
- e) Mileage for Contractor privately owned vehicles at the current New Jersey rate of 31 cents per mile.

## 5.0 Addx GSA MOBIS Schedule



**GENERAL SERVICES ADMINISTRATION**  
**Mission Oriented Business Integrated Services (MOBIS)**

### **Addx Corporation**

Contract Number GS-10F-0349N

Federal Supply Service  
Authorized Federal Supply Schedule Price List  
Federal Supply Group: 874  
FSC Class: 8742

Contract Number: GS-10F-0349N

Contract Period: April 17, 2008 – April 16, 2013

Modification: 15/Schedule 874

Contractor: Addx Corporation  
4900 Seminary Road, Suite 570  
Alexandria, VA 22311-1878  
www.addxcorp.com

Authorized to bind the Firm:

William Millward, President & CEO  
(703) 933-7637, wmillward@addxcorp.com

Contract Administration Point of Contact:

Barbara Cass, Finance and Contracting  
(703) 933-7637, bcass@addxcorp.com

Business Size: Small  
Service Disabled Veteran Owned Small Business

DUNS Number: 039872622

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage!, a menu-driven database system. The Internet address for GSA Advantage! is: [www.gsaAdvantage.gov](http://www.gsaAdvantage.gov)

**Addx Corporation • Contract Number GS-10F-0349N**



1a. Awarded Special Items	SIN 874-1 Consulting Services SIN 874-2 Facilitation Services SIN 874-3 Survey Sciences Services SIN 874-4 Training Services SIN 874-5 Support Products SIN 874-7 Program Integration and Project Management
1b. Lowest Unit Price	Pricing List
1c. Labor Category Descriptions	Attached
2. Maximum Order	\$1,000,000
3. Minimum Order	\$100
4. Geographic Coverage	Worldwide
5. Points of Production	As required per task order
6. Discounts from list Price Statement of Net Price	Prices are net discounted
7. Quantity Discounts	Negotiated per order
8. Prompt Payment Terms	None
9a. Government Credit Card at or below micro-purchase threshold	Not Accepted
9b. Government Credit Card above micro-purchase threshold	Not Accepted
10. Foreign Items	None
11a. Time of Delivery	Negotiated per order
11b. Expedited Delivery	Negotiated per order
<i>Items available for expedited delivery are noted in this price list</i>	
11c. Overnight and 2-day delivery	Not Applicable
11d. Urgent Requirements	Negotiated per order
<i>In accordance with clause I-FSS-140-B Addx Corporation shall reply to any inquiry for accelerated delivery within 3 working days after receipt of inquiry. Any telephone inquiries or replies will be confirmed by Addx Corporation in writing.</i>	
12. FOB Point(s)	Destination
13a. Ordering Address(es)	Same as Contractor
13b. Ordering Procedures	
<i>For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs), and a sample BPA can be found at the GSA/FSS Schedule homepage: <a href="http://fss.gsa.gov/schedules">http://fss.gsa.gov/schedules</a></i>	
14. Payment Address	Addx Corporation 4900 Seminary Road, Ste 570 Alexandria, VA 22311
15. Warranty Provisions	Standard Commercial Warranty



16.	Export Packing Charges	Not Applicable
17.	Terms of Government Commercial Credit Card Acceptance	Not Applicable
18.	Terms and Conditions of Rental, Maintenance, Repair	Not Applicable
19.	Terms and Conditions of Installation	Not Applicable
20a.	Terms and Conditions of Repair Parts	Not Applicable
20b.	Terms and Conditions for any other services	Not Applicable
21.	List of Service and Distribution Points	Not Applicable
22.	List of Participating Dealers	Not Applicable
23.	Preventive Maintenance	Not Applicable
24a.	Special attributes such as environmental attributes	Not Applicable
24b.	Section 508 compliance information available on Electronic and Information Technology (EIT) supplies and services	Not Applicable
25.	Data Universal Number System (DUNS) Number	039872622
26.	Registration in Central Contractor Registration (CCR) Database	1XPA3
27.	Uncompensated Overtime	Not Applicable



## **Firm Overview**

Addx Corporation ([www.addxcorp.com](http://www.addxcorp.com)) is a principal provider of information and management sciences expertise through **management consulting, technology, and program management services**. As a Service-Disabled Veteran Owned Small Business (SDVOSB) founded in 2002 and headquartered in Alexandria VA, we have a solid history of helping federal agencies improve their processes in ways that increase efficiency, effectiveness, and productivity. For these reasons, Addx was a 2007 to 2010 Inc. 500 honoree and a 2007 to 2009 Washington Technology Fast 50 awardee.

### **Management Consulting Services**

#### **Strategic Human Capital Management**

##### **Services Include:**

- Strategic Human Capital Planning
- Workforce Planning and Analytics
- Workforce Development
- Organization Development and Transformation

#### **Advanced Training and Simulation**

##### **Services Include:**

- Concept of Operations Development
- Mission Planning and Rehearsal
- Domain Application Development

#### **Business Operations Management**

##### **Services Include:**

- Strategic and Transformation Planning
- Performance Management
- Business Process Management and Re-engineering
- Benchmarking & Best Practices Analysis

#### **Knowledge Management**

##### **Services Include:**

- Knowledge Enterprise Planning
- Build, Operate and Broker Knowledge System
- Learning Organization Development

#### **Studies and Analyses**

##### **Services Include:**

- Forecasting and Trend Analysis
- Program Performance Assessments
- Requirements & Capabilities Needs Analysis
- Cost Benefit Analysis and Financial Modeling
- Modeling and Simulation

### **Technology Services**

#### **Professional Services**

##### **Services Include:**

- Program Oversight & Management

- Systems Development Lifecycle Development (SDLC)
- Technical Risk Assessment
- Technology Selection & Implementation
- Enterprise Organization Transformation
- Standards Compliance Reviews
- IV&V
- Incident, Problem, and Change Management Implementation Support
- Surge Staffing for a variety of disciplines
- Records Management

### **Policy and Governance**

#### **Services Include:**

- Portfolio Management
- Capital Planning and Investment Control
- Service Level Agreement Management
- Sarbanes Oxley General Controls Compliance Support
- Operational Methods and Procedures
- Budget formulation and Exhibit 300 Support
- Records Management

### **Information Assurance**

#### **Services Include:**

- Enterprise Security Architecture Consulting
- Security Assessments
- Standards Compliance Reviews

### **Systems Engineering**

#### **Services Include:**

- Infrastructure Library (ITIL)
- Enterprise Architecture
- Rights Management
- Service Desk Design & Implementation

### **Program Management Services**

#### **Program Management Office Support**

#### **Services Include:**

- Program Planning and Execution
- Cost, Schedule, Scope, and Earned Value Management
- Quality Assurance and Surveillance
- Expert Action Officer Support
- Research and Administrative Support

### **Acquisition Management Support**

#### **Services Include:**

- Statement of Work Development
- Compliant Request for Proposal Preparation
- Contracts Negotiation
- Post Award Management



- IPT Facilitation

### **Financial Management Support Addx Corporation**

#### **Services Include:**

- Financial Strategy and Planning
- Financial Management and Execution
- Compliance, Monitoring & Evaluation

### **Professional Staffing**

#### **Services Include:**

- Position Descriptions Development
- Recruitment and Selection Support
- Hiring/Position Gap Support

Addx adheres to an established, proven, rigorous systems engineering approach, whether the task involves program management, technology or management consulting. We have dedicated PMI certified PMPs who deliver our services with the highest degree of customer satisfaction and quality.

The name Addx stands for excellence, responsiveness, and efficiency. Our focus and differentiation is to provide clients customized solutions through a combination of service excellence, responsive delivery, and efficient implementation. This combination aligns the right people, processes and supporting technologies to help our customers reduce risk, accomplish their mission requirements and achieve lasting results. Our mission is to help clients achieve substantial and lasting results in mission performance.

### **Our Guiding Principles**

**Excellence** - Our work is defined by deep service expertise conducted responsibly, reliably, and with lasting results our customers can count on.

**Responsiveness** - Our reputation is defined by the highest standards of professionalism and performance, adapting quickly and collaboratively to changing needs.

**Efficiency** - Our business is defined by our commitment to doing what is right by our clients through delivering best value in price and results.

### **Our Approach To Achieve Lasting Results**

Addx strives to provide the customer with a **complete solution**. To this end, in addition to our own talent pool, we team with other companies and subject matter experts to ensure all customer needs are met.



Our diverse range of knowledge and experience in MOBIS allows us to quickly and effectively understand customer needs from both a management and technical perspective. This foundation of knowledge and expertise enhances our reputation for successful contract execution. This reputation stems from strict adherence to a rigorous, structured set of management policies and procedures that fit the MOBIS objectives. Our project and program managers are formally and systematically trained to deliver repeatable and defined project management policies, procedures and quality plans applicable to every project. This repeatability of technical and project management equates to stability and superior performance efficiency on every project. Our processes also ensure an unprecedented customer insight and control of every project from kick-off to delivery.

Addx Corporation's management and quality focus is to achieve high customer satisfaction. Our philosophy of recruiting, assigning, and empowering the best available experts to support our customers and resolve their technical issues is key to the company's success in consistently delivering high quality products.

Addx strives to provide this superior customer service all the while maintaining effective cost and schedule controls. Addx assigns specific roles and responsibilities for each Addx Team member assigned to the project to ensure efficient execution of project tasks and the generation of high quality products.

Addx Corporation employs technical experts whose skills and experience match directly to the MOBIS task requirements. We staff MOBIS contractual task orders using the best available talent. Our flexibility allows us to respond to emergent needs and new task areas quickly and efficiently. We understand the importance of, and are committed to, providing quality service and customer satisfaction.

## **MOBIS SERVICES AND PRODUCTS**

### **SIN 874-1, 874-1RC: CONSULTING SERVICES**

Addx provides expert advice, assistance, guidance or counseling in support of agencies' mission oriented business functions. This may include: Management or strategy consulting; program planning, audits and evaluations; studies, analyses, scenarios, and reports relating to mission-oriented business programs or initiatives, such as defense studies, tabletop exercises or scenario simulations; educational studies, regulatory studies, economic studies, and preparedness studies; executive/management coaching services; customized training as part of a consulting engagement; policy and regulatory development and review; expert witness services in support of litigation, claims, or other formal cases, and advisory and assistance services in accordance with FAR 37.203(b). Examples of consultation include but are not limited to: information and decision sciences consulting, strategic, business and action planning; high performance work; process and productivity improvement, systems alignment; leadership systems; organizational assessments; cycle time; performance measures and indicators; program audits, evaluations, and customized training.

### **SIN 874-2, 874-2RC: FACILITATION SERVICES**

Addx provides facilitation and related decision support services to agencies engaged in collaboration efforts, working groups, or integrated product, process, or self-directed teams. Agencies bringing together diverse teams and/or groups with common and divergent interests may require a neutral party to assist them in: the use of problem solving techniques; defining and refining the agenda; debriefing and overall meeting planning; resolving disputes, disagreements, and divergent views; logistical meeting/conference support when performing technical facilitation; convening and leading large and small group briefings and discussions; providing a draft for the permanent record; recording discussion content and enabling focused decision-making; preparing draft and final reports for dissemination.

### **SIN 874-3, 874-3RC: SURVEY SERVICE**

Addx provides expert consultation, assistance, and deliverables associated with all aspects of surveying within the context of MOBIS. Addx manages or performs all phases of the survey process which is not limited to: planning survey design; sampling, survey development; pretest/pilot surveying; defining and refining the agenda; survey database administration; assessing reliability and validity of data; determining proper survey data collection methodology; administering surveys using various types of data collection methods; and analyses of quantitative and qualitative survey data. Addx manages or produces reports not limited to: description and summary of results with associated graphs, charts, and tables; description of data collection and survey administration methods; discussion of sample characteristics and the representative nature of data; analysis of non-response; and briefings of results to include discussion of recommendations and potential follow-up actions.

### **SIN 874-4: TRAINING SERVICES**

Addx manages and/or provides training services in areas including but not limited to mentoring, coaching and professional development. Addx utilizes professionally developed products,

including off-the-shelf training packages, to meet agency objectives and needs related to business services. Training services offered include and is not limited to: executive leadership, acquisition, Lean Six Sigma, management, supervision, teamwork, team building, customer service, ISO 9000, process improvement, performance management, performance measurement; statistical process control; performance problem-solving; business process reengineering; quality management; change management; strategic planning; and benchmarking.

#### **SIN 874-5: SUPPORT PRODUCTS**

Addx provides support products in conjunction with support of services offered in SINS 1, 2, 3, 4 and 7. Support products may include, but are not limited to: workbooks, training manuals, slides, videotapes, CDs, DVDs, software programs, etc.

#### **SIN 874-6, 874-6RC: ACQUISITION MANAGEMENT SUPPORT**

Addx Corporation provides support to agencies in conducting federal acquisition management activities, as follows: Acquisition planning assistance; developing acquisition documents, including quality assurance surveillance plans, statements of work, synopses, and solicitations; expert assistance in evaluating proposals; contract administration services; and competitive sourcing support, including OMB Circular A-76 studies, strategic sourcing studies, privatization studies, public-private partnerships, and Federal Activities Inventory Reform (FAIR) Act studies.

#### **SIN 874-7, 874-7RC: PROGRAM AND PROJECT MANAGEMENT SERVICES**

Addx Corporation's program integration and project management services provide assistance to agencies in planning, initiating, managing, executing, and closing out mission-oriented business programs and projects. Services include: Project leadership and communications with stakeholders; project planning and scheduling; earned value management support; project management, including performance monitoring and measurement; reporting and documentation associated with project/program objectives; stakeholder briefings, participation in required meetings, and related project support services; program integration services; project close-out services; subcontractor management, Contractor Team Agreements (CTAs), and rapid personnel staffing.



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## ***ADDX CORPORATION LABOR CATEGORY DESCRIPTIONS***

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### **Senior Executive Consultant:**

#### **Minimum Experience:**

- MA/MS plus more than 20 years direct experience

#### **Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 12 years direct experience
- BA/BS plus more than 24 years direct experience

Experience includes: Management at an executive level, development and integration of global business solutions, creation of competitive strategies and management of multiple client engagements. A Senior Executive Consultant works with senior client staff to monitor quality and risk. A Senior Executive Consultant identifies and addresses potential project and resource issues that will affect services and products. A Senior Executive Consultant is skilled at reviewing, designing and implementing strategic plans and aligning organizational and infrastructure designs with business objectives and goals. A Senior Executive Consultant is highly skilled at scoping the bona fide requirements, organizing, coordinating acquisition management activities at program level, the contracting office, the financial organization and Agency support services offices such that the Agency can successfully specify, schedule, produce, execute and close enterprise wide/major systems product and services acquisition programs and their attendant portfolio of supporting procurement projects.

**Functional Responsibility:** Oversees and manages projects and programs. Provides specialized knowledge in specific, functional, or operational areas of analysis methods or disciplines. Gathers and organizes information on problems or procedures including current operating procedures. Analyzes data, develops information, and evaluates available solutions or alternate methods of proceeding. Coordinates with customers and trains users to ensure smooth implementation and functional performance of new systems, procedures, or organizations. Develops and implements operational tests and assessments, develops and maintains functional and operating documentation. Plans study of work problems and procedures, such as organizational change, communications, information flow, decision making processes, control processes, operational effectiveness, or cost analyses. Organizes and documents study findings and will prepare recommendations for new system implementation, procedures, or organizational changes, has specialized experience in facilitation, training, methodology development and evaluation, process re-engineering across all phases, identifying best practices, change management, business management techniques, organizational development, activity and data modeling, or information system development methods and practices. Applies process improvement and re-engineering methodologies and principles to conduct process modernization projects. Duties include developing modern business methods, identifying best practices, and creating and assessing performance measurements. Provides group facilitation, interviewing, and training, and provides additional forms of knowledge transfer. Manages the acquisition planning, acquisition and contract administration of complex major projects and programs. The projects and programs may require numerous contracts, some of which usually exceed \$50 million. Duties include providing acquisition planning assistance, executive oversight and

control over the development of the full range of acquisition documents, providing expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Individual possesses technical qualifications equivalent to those possessed by a tenured professor at a major university. Person is responsible for maintaining technical excellence within the company.

**Executive Consultant:**

**Minimum Experience:**

- MA/MS plus more than 18 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 10 years direct experience
- BA/BS plus more than 22 years direct experience

Experience includes: Management at an executive level, development and integration of global business solutions, creation of competitive strategies and management of multiple client engagements. An Executive Consultant works with senior client staff to monitor quality and risk. An Executive Consultant identifies and addresses potential project and resource issues that will affect services and products. An Executive Consultant is skilled at reviewing, designing and implementing strategic plans and aligning organizational and infrastructure designs with business objectives and goals. An Executive Consultant is skilled at organizing, and coordinating at program level contracting, financial and support services offices for the purposes of successfully specifying, acquisition schedules, produce, execute and close enterprise wide and major systems level product and services acquisition programs and their attendant portfolio of supporting procurement projects.

**Functional Responsibility:** Plans, organizes, directs, and conducts consulting, survey, or training tasks in problem areas of extensive scope and complexity. The problems are difficult to define, and may require novel approaches and the use of sophisticated techniques. Has extensive technical responsibility for interpreting, organizing, executing, and coordinating assignments, including the direction of other staff. Keeps abreast of new MOBIS-related methodologies, data bases, and tools. Makes decisions, which are considered authoritative and which demonstrate mature judgment in anticipating and solving complex problems. Within defined objectives, but with considerable latitude, performs in a professional position requiring in-depth knowledge. Individual is capable of independent, complex analysis, concept formulation and new method identification, and may serve as a prime point of contact for clients. Provides expert acquisition planning assistance, executive oversight and control over the development of the full range of acquisition documents, while providing expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Plans, organizes, and directs a staff that provides acquisition planning, acquisition and contract administration in support of contracts for major projects and programs. The contracts are multimillion dollar value contracts but usually exceed \$50 million.

**Principal Consultant II:**

**Minimum Experience:**

- MA/MS plus more than 16 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 8 years direct experience
- BA/BS plus more than 20 years direct experience

**Functional Responsibility:** Plans, organizes, directs, and conducts consulting, survey, or training tasks in problem areas of extensive scope and complexity. The problems are difficult to define, and may require novel approaches and the use of sophisticated techniques. Has extensive technical responsibility for interpreting, organizing, executing, and coordinating assignments, including the direction of other staff. Keeps abreast of new MOBIS-related methodologies, data bases, and tools. Makes decisions, which are considered authoritative and which demonstrate mature judgment in anticipating and solving complex problems. Within defined objectives, but with considerable latitude, performs in a professional position requiring in-depth knowledge. Individual is capable of independent, complex analysis, concept formulation and new method identification, and may serve as a prime point of contact for clients. Plans, organizes, and directs a staff that provides acquisition planning, acquisition and contract administration in support of contracts for major projects and programs. The contracts are multimillion dollar value contracts but usually exceed \$50 million. Organizes, and coordinates at program level contracting, financial and support services offices for the purposes of successfully specifying, acquisition schedules, produce, execute and close enterprise wide and major systems level product and services acquisition programs and their attendant portfolio of supporting procurement projects. Provides acquisition planning assistance, oversight and control over the development of complex acquisition documents, provides expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support.

**Principal Consultant I:**

**Minimum Experience:**

- MA/MS plus more than 14 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 7 years direct experience
- BA/BS plus more than 18 years direct experience

**Functional Responsibility:** Plans, organizes, directs, and conducts consulting, survey, or training tasks in problem areas of extensive scope and complexity. The problems are difficult to define, and may require novel approaches and the use of sophisticated techniques. Has extensive technical responsibility for interpreting, organizing, executing, and coordinating assignments, including the direction of other staff. Keeps abreast of new MOBIS-related methodologies, data bases, and tools. Makes decisions, which are considered authoritative and which demonstrate mature judgment in anticipating and solving complex problems. Within defined objectives, but with considerable latitude, performs in a professional position requiring in-depth knowledge. Individual is capable of independent, complex analysis, concept formulation and new method identification, and may serve as a prime point of contact for clients. A Principal Consultant I is skilled at organizing, and coordinating at major project level contracting, financial and support services offices for the purposes of successfully specifying, acquisition schedules, produce,

execute and close enterprise wide and major systems level product and services acquisition programs and their attendant portfolio of supporting work packages and task assignments. Provides acquisition planning assistance, oversight and control over the development of complex acquisition documents, provides expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Plans organizes and directs a staff that provides acquisition planning, acquisition and contract administration in support of contracts for major projects and programs. The contracts are multimillion dollar value contracts but usually exceed \$50 million.

**Senior Management Consultant II:**

**Minimum Experience:**

- MA/MS plus more than 12 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 6 years direct experience
- BA/BS plus more than 16 years direct experience
- HS/GED and at least 26 years direct experience in a related field / industry

**Functional Responsibility:** Designs and implements complex organizational change that addresses strategic, structural, process, and behavioral factors. Develops strategic plans, business plans, organizational assessments, cultural change programs, and business process improvements. Assists governmental agencies in implementing the Government Performance and Results Act in strategic planning, and the executive order directed towards labor-management partnership. Has experience in facilitation, process re-engineering across all phases, identifying best practices, change management, business management techniques, organizational development, activity and data modeling, or information system development methods and practices. Applies process improvement and re-engineering methodologies and principles to conduct process modernization projects. As senior company expert within a technical field, serves as project manager in complex and mission critical client assignments. Applies software, hardware, and standards information technology skills in the analysis, specification, development, integration, and acquisition of logistical systems of information management applications. Ensures these systems and applications are compliant with standards for open systems architectures, reference models, and profiles of standards as they apply to the implementation and specification of information management solutions on the application platform, across the application program interface, and the external environment/software application. Performs analysis and validation of reusable software/hardware components to ensure the integration of these components into interoperable information management designs for logistical systems. Evaluates analytically and systematically problems of workflow, organization, and planning and develops appropriate corrective action. Applies business process improvement practices to re-engineer methodologies/principles and business process modernization projects. Applies activity and data modeling, transaction flow analysis, internal control and risk analysis and modern business methods and performance measurement techniques. A Senior Management Consultant II is skilled at coordinating major project level contracting and support services for the purposes of specifying acquisition schedules, production, execution and close-out of enterprise specific acquisition projects. Work includes attendant work

packages and task assignments portfolio. Provides acquisition planning assistance, oversight and control over the development of acquisition documents, provides expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Designs and implements the acquisition planning, acquisition and contract administration support of contracts for projects and programs. This may include major projects and programs. The contracts are multimillion dollar value contracts and may exceed \$50 million. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

**Senior Management Consultant I:**

**Minimum Experience:**

- MA/MS plus more than 10 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 5 years direct experience
- BA/BS plus more than 15 years direct experience
- HS/GED and at least 25 years direct experience in a related field / industry

**Functional Responsibility:** Designs and implements complex organizational change that addresses strategic, structural, process, and behavioral factors. Develops strategic plans, business plans, organizational assessments, cultural change programs, and business process improvements. Assists governmental agencies in implementing the Government Performance and Results Act in strategic planning, and the executive order directed towards labor-management partnership. Has experience in facilitation, process re-engineering across all phases, identifying best practices, change management, business management techniques, organizational development, activity and data modeling, or information system development methods and practices. Applies process improvement and re-engineering methodologies and principles to conduct process modernization projects. As senior company expert within a technical field, serves as project manager in complex and mission critical client assignments. Applies software, hardware, and standards information technology skills in the analysis, specification, development, integration, and acquisition of logistical systems of information management applications. Ensures these systems and applications are compliant with standards for open systems architectures, reference models, and profiles of standards as they apply to the implementation and specification of information management solutions on the application platform, across the application program interface, and the external environment/software application. Performs analysis and validation of reusable software/hardware components to ensure the integration of these components into interoperable information management designs for logistical systems. Evaluates analytically and systematically problems of workflow, organization, and planning and develops appropriate corrective action. Applies business process improvement practices to re-engineer methodologies/principles and business process modernization projects. Applies activity and data modeling, transaction flow analysis, internal control and risk analysis and modern business methods and performance measurement techniques. A Senior Management Consultant I is skilled at coordinating major project level contracting and support services for the purposes of specifying acquisition schedules, production,

execution and close-out of enterprise specific acquisition projects. Work includes attendant work packages and task assignments portfolio. Provides acquisition planning assistance, oversight and control over the development of acquisition documents, provides expert assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Designs and implements the acquisition planning, acquisition and contract administration support of contracts for projects and programs. This may include major projects and programs. The contracts are multimillion dollar value contracts and may exceed \$50 million. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

**Management Consultant II:**

**Minimum Experience:**

- MA/MS plus more than 10 years direct experience

**Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 2 years direct experience
- BA/BS plus more than 12 years direct experience
- HS/GED and at least 22 years direct experience in a related field / industry

**Functional Responsibility:** Within broad objectives, performs in a professional position requiring high level specialized knowledge and experience. Demonstrates ability to analyze complex problems, research and synthesize data, and propose unique solutions or alternatives. Individual is a recognized leader in one or more disciplines, and may serve as a prime point of contact for clients. Performs studies and reviews of management and organizational structures to evaluate performance relative to business objectives. Advises on business strategies and realignment issues to focus on most beneficial objectives. Provides strategic advice and plans for systematic downsizing, outsourcing, and privatization. Addresses issues affecting management and workforce to improve productivity while reengineering the organization. Provides assistance in the evaluation, auditor service, and implementation support of quality standards to achieve certification. Provides leadership in government and industry meetings, briefings, and forums to facilitate the exchange of ideas and concepts. A Management Consultant II is skilled at coordinating at the large project level contracting support services for the purposes of successfully specifying acquisition schedules, production, execution and close-out of enterprise specific services and systems product and associated services acquisition projects and their attendant portfolio of work packages and task assignments. Provides acquisition planning assistance, oversight and control over the development and production of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Performs the acquisition planning, acquisition and contract administration functions in support of contracts for projects and programs and obtains next higher level approval/concurrence of actions when required. The range of support required may be from simplified acquisition contracts to multimillion dollar value contracts. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

## **Management Consultant I:**

### **Minimum Experience:**

- MA/MS plus more than 8 years direct experience

### **Acceptable Substitution Experience:**

- Ph.D. in a related academic field plus more than 1 years direct experience
- BA/BS plus more than 10 years direct experience
- HS/GED and at least 20 years direct experience in a related field / industry

**Functional Responsibility:** Within broad objectives, performs in a professional position requiring high level specialized knowledge and experience. Demonstrates ability to analyze complex problems, research and synthesize data, and propose unique solutions or alternatives. Individual is a recognized leader in one or more disciplines, and may serve as a prime point of contact for clients. Performs studies and reviews of management and organizational structures to evaluate performance relative to business objectives. Advises on business strategies and realignment issues to focus on most beneficial objectives. Provides strategic advice and plans for systematic downsizing, outsourcing, and privatization. Addresses issues affecting management and workforce to improve productivity while reengineering the organization. Provides assistance in the evaluation, auditor service, and implementation support of quality standards to achieve certification. Provides leadership in government and industry meetings, briefings, and forums to facilitate the exchange of ideas and concepts. A Management Consultant I is skilled at coordinating at the project level contracting support services for the purposes of successfully specifying acquisition schedules, production, execution and close-out of enterprise specific services and systems product and associated services acquisition projects and their attendant portfolio of work packages and task assignments. Provides acquisition planning assistance, oversight and control over the development and production of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Performs the acquisition planning, acquisition and contract administration functions in support of contracts for projects and programs and obtains next higher level approval/concurrence of actions when required. The range of support required may be from simplified acquisition contracts to multimillion dollar value contracts. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

## **Consultant II:**

### **Minimum Experience:**

- MA/MS plus more than 5 years direct experience

### **Acceptable Substitution Experience:**

- BA/BS plus more than 8 years direct experience
- HS/GED and at least 14 years direct experience in a related field / industry

**Functional Responsibility:** Applies process improvement and reengineering methodologies and principles to conduct process modernization projects. Duties include business activity and data modeling, developing modern business methods, identifying best practices, and creating and

assessing performance measurements. Provides group facilitation, interviewing, training, and provides additional forms of knowledge transfer. Works within general guidelines on broadly defined projects. Individual requires originality, with some latitude for un-reviewed decision making, and frequent client contact is routine. A Consultant II is skilled at coordinating at the project level contracting support services for the purposes of specifying acquisition schedules, production, execution and close-out of enterprise specific services and systems product and associated services acquisition projects and their attendant portfolio of work packages. Provides acquisition planning assistance, oversight and control over the development and production of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Performs the acquisition planning, acquisition and contract administration functions in support of contracts from simplified acquisition to multimillion dollar value and obtains next higher level approval/concurrence of actions when required. May occasionally require guidance from a more senior level staff member. Also, under the direction of a more senior staff member, performs these functions in a support role for more complex contacts exceeding \$50 million. Performs all reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

**Consultant I:**

**Minimum Experience:**

- MA/MS plus more than 4 years direct experience

**Acceptable Substitution Experience:**

- BA/BS plus more than 6 years direct experience
- HS/GED and at least 12 years direct experience in a related field / industry

**Functional Responsibility:** Applies process improvement and reengineering methodologies and principles to conduct process modernization projects. Duties include business activity and data modeling, developing modern business methods, identifying best practices, and creating and assessing performance measurements. Provides group facilitation, interviewing, training, and provides additional forms of knowledge transfer. Works within general guidelines on broadly defined projects. Individual requires originality, with some latitude for un-reviewed decision making, and frequent client contact is routine. A Consultant I is skilled at the project level in performing contracting support services for the purposes of specifying acquisition schedules, production, execution and close-out of enterprise specific services and systems product and associated services acquisition projects and their attendant work packages. Provides acquisition planning assistance, oversight and control over the development and production of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Performs the acquisition planning, acquisition and contract administration functions in support of contracts from simplified acquisition to multimillion dollar value and obtains next higher level approval/concurrence of actions when required. May occasionally require guidance from a more senior level staff member. Also, under the direction of a more senior staff member, performs these functions in a support role for more complex contacts exceeding \$50 million. Performs all

reporting requirements to Senior Management and alerts Senior Management of matters that require their attention or exceeds the authority of this labor category.

**Associate Consultant II:**

**Minimum Experience:**

- BA/BS plus more than 3 years direct experience

**Acceptable Substitution Experience:**

- Associates degree plus more than 4 years direct experience.
- HS/GED and at least 9 years direct experience in a related field / industry

**Functional Responsibility:** Performs word processing, financial, database, and other software functions; prepares forms, correspondence, and other documents. Create and assess performance measures. An Associate Consultant II performs contracting support services for the purposes of documenting acquisition schedules, production schedules and for providing close-out support for enterprise specific services and systems product and associated services acquisition projects and their attendant work packages. Provides acquisition planning assistance and production services supporting the development of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Supports the acquisition and contract administration functions. Assembles the Request For Proposal, and prepares for issuance. Organizes pre-solicitation documents, contract documents and associated acquisition correspondence and prepares for file. Prepares the file folders and files all acquisition documents.

**Associate Consultant I:**

**Minimum Experience:**

- BA/BS plus more than 2 years direct experience

**Acceptable Substitution Experience:**

- Associates degree plus more than 3 years direct experience.
- HS/GED and at least 8 years direct experience in a related field / industry

**Functional Responsibility:** Perform general secretarial, administrative and office duties such as ordering supplies, maintaining records management systems. Perform basic statistical and budget work. Manage and maintain calendars and schedules and prepare invoices, reports, memos, letters, travel vouchers, and other documents using word processing, spreadsheet, database, and/or presentation software. Read and analyze incoming memos, submissions, and reports in order to determine significance and plan distribution. Open, sort, and distribute incoming correspondence, faxes and email as well as file and retrieve documents, records and reports. Prepare responses to correspondence containing routine inquiries. Maintain library documents. Communicate effectively with all levels of people within and outside the organization. Greet visitors, check clearances and determine access to individuals and groups. An Associate Consultant I performs contracting support services for the purposes of documenting acquisition schedules, production schedules and for providing close-out support for enterprise specific services and systems product and associated services acquisition projects and their attendant work packages. Provides acquisition planning assistance and production services supporting the

development of acquisition documents, provides specialized knowledge area assistance in evaluating proposals, providing contract administrative support services and competitive sourcing support. Has general familiarity with the acquisition process, forms and purpose so support can be provided to the acquisition staff with a minimum of guidance. Makes data entry into contract management data base systems.

**Administrator II:**

**Minimum Experience:**

- Associates degree plus 1 year experience

**Acceptable Substitution Experience:**

- HS Diploma plus 3 years direct experience

**Functional Responsibility:** Perform general secretarial, administrative and office duties such as ordering supplies, maintaining records management systems. Perform basic statistical and budget work. Manage and maintain calendars and schedules and prepare invoices, reports, memos, letters, travel vouchers, and other documents using word processing, spreadsheet, database, and/or presentation software. Read and analyze incoming memos, submissions, and reports in order to determine significance and plan distribution. Open, sort, and distribute incoming correspondence, faxes and email as well as file and retrieve documents, records and reports. Prepare responses to correspondence containing routine inquiries. Maintain library documents. Communicate effectively with all levels of people within and outside the organization. Greet visitors, check clearances and determine access to individuals and groups. An Administrator II provides contracting support services for the purposes of producing Federal Procurement documents at the direction of others, recording the accomplishment of acquisition schedule milestones, procurement production schedules and milestones and provides contract close-out support services and products. . Provides acquisition assistance for the production of acquisition documents, provides assistance in documenting the evaluation of proposals, provides contract/order administrative support services support Has general familiarity with the acquisition process, forms and purpose so support can be provided to the acquisition staff with a minimum of guidance. Makes data entry into contract management data base systems.

**Administrator I:**

**Minimum Experience:**

- Associates degree

**Acceptable Substitution Experience:**

- HS Diploma plus 1 year direct experience

**Functional Responsibility:** Perform general secretarial, administrative and office duties such as ordering supplies, maintaining records management systems. Perform basic statistical and budget work. Manage and maintain calendars and schedules and prepare invoices, reports, memos, letters, travel vouchers, and other documents using word processing, spreadsheet, database, and/or presentation software. Read and analyze incoming memos, submissions, and reports in order to determine significance and plan distribution. Open, sort, and distribute incoming correspondence, faxes and email as well as file and retrieve documents, records and reports.



Prepare responses to correspondence containing routine inquiries. Maintain library documents. Communicate effectively with all levels of people within and outside the organization. Greet visitors, check clearances and determine access to individuals and groups. An Administrator I provides contracting support services for the purposes of producing Federal Procurement documents at the direction of others, documenting acquisition schedule milestones, procurement production schedules and milestones and for providing contract close-out support services and products. Provides acquisition assistance for the production of acquisition documents, provides contract administrative support services and competitive sourcing staff support. Has general familiarity with the acquisition process, forms and purpose so support can be provided to the acquisition staff with a minimum of guidance. Makes data entry into contract management data base systems.



**MOBIS Contract # GS-10F-0349N  
 Addx Corporation Labor Rates  
 April 17, 2008 – April 16, 2013  
 Includes 0.75% IFF**

<u>Labor Categories</u>	<u>Government Hourly Rates</u>	<u>Government Daily Rates</u>
Senior Executive Consultant	\$272.68	\$2,181.44
Executive Consultant	\$198.51	\$1,588.11
Principal Consultant II	\$180.42	\$1,443.39
Principal Consultant I	\$169.50	\$1,355.99
Sr. Management Consultant II	\$163.60	\$1,308.81
Sr. Management Consultant I	\$136.69	\$1,093.54
Management Consultant II	\$125.75	\$1,005.98
Management Consultant I	\$114.53	\$916.20
Consultant II	\$98.42	\$787.35
Consultant I	\$86.16	\$689.32
Associate Consultant II	\$71.08	\$568.64
Associate Consultant I	\$63.80	\$510.43
Administrator II	\$49.21	\$393.67
Administrator I	\$38.27	\$306.19

**SIN 874-4 and 874-4RC**

<b>Training Course</b>	<b>Price</b>
Continuity Management (Per Student)	\$3,237.47

**SIN 874-5 and 874-5RC**

<b>Support Product</b>	<b>Price</b>
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Continuity Management Workbook

\$80.94



**MOBIS Contract # GS-10F-0349N**

**Addx Corporation Office Locations**

**Washington, DC Metropolitan Area:**

**4900 Seminary Road**

**Suite 570**

**Alexandria, VA 22311**

**Main: (703) 933-7637**

**Fax: [REDACTED]**