

WillowTree Advisors is a woman-owned, small business that provides expert knowledge to reduce costs, leverage technology systems and human resources to do the daily work of government.

General Services Administration

Federal Supply Service
Authorized Federal Supply Schedule Price List
Mission Oriented Business Integrated Services (MOBIS)



FSC Group:	874
Contract Number:	GS-10F-0002Y
Contract Period:	October 11 2011 – October 10, 2016
Points of Contact:	Kathryn Douglass, Program Manager 3773 Cherry Creek North Drive Suite 575 Denver, Colorado 80209 Phone: 888.998.0008 Email: kathryn.douglass@willowtreadvisors.com
	Tobin Threadgill, Contracts Manager 3773 Cherry Creek North Drive Suite 575 Denver, Colorado 80209 Phone: 888.998.0008 Email: tobin.threadgill@willowtreadvisors.com

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at <http://www.fss.gsa.gov>. Online access to contract ordering information, terms and conditions, and up to date pricing is available through GSA Advantage!™ at <http://www.gsaadvantage.gov>

Date: October 28, 2011

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Customer Information:

1.a	Special Item Numbers:	SIN 874-1 Consultation Services SIN 874-6 Acquisition Management Support
1.b	Price Lists and Rates:	See Pricing List, Page 10
1.c	Labor Category Descriptions and Qualifications:	See Labor Categories, Page 11
2.	Maximum Order:	\$1,000,000.00
3.	Minimum Order:	\$300.00
4.	Geographic Coverage:	United States
5.	Point(s) of Production:	United States
6.	Discount from List Prices or Statement of Net Price:	All prices herein are net
7.	Quantity Discounts:	None
8.	Prompt Payment Terms:	0% net 30 days.
9.a	Government Commercial Credit Card at or below Micro-Purchase Threshold:	Government commercial credit cards are not accepted.
9.b	Government Commercial Credit Card Above Micro-Purchase Threshold:	Not applicable.
10.	Foreign Items:	None.
11.	Delivery:	
11 a.	Time of Delivery:	Time of delivery is specified in negotiated delivery/task orders
11. b	Expedited Delivery:	Items available for expedited delivery are noted in this price list
11.c	Overnight and 2-day Delivery:	Not applicable.
11.d	Urgent Requirements:	Urgent Requirements are specified in negotiated delivery/task orders.
12.	F.O.B. Point(s):	Destination
13.a	Ordering Address:	WillowTree Advisors, LLC (WTA) 3773 Cherry Creek North Drive #575 Denver, CO 80439 Attention: Tobin Threadgill Phone: 888.998.0008 FAX: 888.233.1472 email: tobin.threadgill@willowtreadvisors.com

<p>13.b Ordering Procedures:</p>	<p>For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA's) can be found at the GSA/FSS Schedule homepage: http://fss.gsa.gov/schedules</p>
<p>14. Payment Addresses:</p>	<p>Check Remittance: WillowTree Advisors, LLC 31979 Quarterhorse Road Evergreen, CO 80439</p>
	<p>Electronic Remittance: Bank: In Touch Credit Union Beneficiary Name: WillowTree Advisors, LLC Account #: 859305 7843 ABA#: 311 079 474</p>
<p>15. Warranty Provision:</p>	<p>Standard Commercial Warranty.</p>
<p>16. Export Packing Charges:</p>	<p>Not applicable.</p>
<p>17. Terms and conditions of Government Commercial Credit Card Acceptance:</p>	<p>Not applicable.</p>
<p>18. Terms and Conditions of Rental, Maintenance and Repair:</p>	<p>Not applicable.</p>
<p>19. Terms and Conditions of Installation:</p>	<p>Not applicable.</p>
<p>20. Terms and conditions of Repair Parts:</p>	<p>Not applicable.</p>
<p>20.a Terms and Conditions for Any Other Services:</p>	<p>Not applicable.</p>
<p>21. List of Service and Distribution Points:</p>	<p>Not applicable.</p>
<p>22. List of Participating Dealers: Not</p>	<p>Not applicable.</p>
<p>23. Preventive Maintenance:</p>	<p>Not applicable.</p>
<p>24. Special Attributes such as Environmental Attributes</p>	<p>Not applicable.</p>
<p>25. Data Universal Number System (DUNS) number</p>	<p>830931510</p>
<p>26. Registration in Central Contractor Registration (CCR) Database:</p>	<p>WillowTree Advisors is registered in the CCR database. CAGE Code: 5J3B0</p>

Contract Overview

Overview:

Under the GSA federal supply schedule contract a GSA Federal Supply Schedule Contract for Mission Oriented Business Integrated Services (MOBIS), Contract No. GS-10F-0002Y. The current contract period is 10/11/2011 through 10/11/2016. The MOBIS contract is an indefinite delivery, indefinite quantity, multiple award schedule contract that provides for Firm Fixed Price, Time and Materials orders using the labor categories and ceiling rates defined in the contract and this catalog price list. The ordering agency determines the order type at its discretion.

Under the federal supply schedule program, GSA enters into contracts with commercial firms to provide supplies and services. This program provides customers with state-of-the-art, high-quality commercial products and services at discount pricing on a direct delivery basis. The federal supply schedule program promotes shorter lead times, lower administrative costs, and reduced inventories.

Multiple award schedule (MAS) contracts are awarded to contractors providing comparable commercial supplies and services at government-negotiated, pre-approved prices. They provide federal agencies with the variety and the flexibility necessary to select the best-valued professional services to meet their requirements. Consistent with the Competition in Contracting Act, multiple award schedule contracts are competitive in that participation in the program is open to all responsible sources, and orders placed following the procedures in Federal Acquisition Regulation 8.4 result in the lowest overall cost alternative. Therefore, when placing orders under federal supply schedules, ordering offices need not:

- seek further competition,
- synopsize the requirement,
- make a separate determination of fair and reasonable pricing, or
- consider small business programs.

GSA already has determined the prices of items under schedule contracts to be fair and reasonable. Advantages of using the GSA MOBIS Services Contract Include:

- Five-year contract-ordering period with one five year option.
- Indefinite delivery / indefinite quantity contract with no ceiling and no maximum order limitations.
- Available to all federal agencies and authorized organizations.
- No synopsis (FedBizOpps posting) is required – all competitive requirements have been met.
- Direct customer and contractor relationship – no transfer of funds to GSA required.
- Reduced lead times – procurement cost savings.
- Labor categories and rates for fixed price and time and materials task orders.
- Provides for teaming and subcontracts.
- Blanket purchase agreements may be established.

Eligible Users:

This contract is available for use by all federal government agencies, as a source for consulting and procurement services, for use in the United States. Executive agencies, other Federal agencies, mixed-ownership Government corporations and the District of Columbia; other activities and organizations authorized by statute or regulation to use GSA as a source of supply may use this contract. Additionally, this contract covers orders from activities within the Executive Branch of the Federal Government.

Company Overview

The willow is a tree whose roots run deep and whose branches are flexible, allowing it to flex and bend during difficult conditions.



WillowTree Advisors
Flexible. Fast. Focused.

WillowTree Advisors, LLC (WTA), a woman-owned, small business (WOSB), was formed in March, 2009 by principals from major consulting firms, such as Price Waterhouse, TPI and EquaTerra. Its principals have over 20 years of consulting experience in business strategy and planning, Information Technology, and business transformation. WTA is a management consulting firm advising clients in cost effective transformation through operational improvements, organizational design, technology adoption and change management. We use the best industry standards, methodologies and approaches to help clients reduce costs, eliminate waste and improve customer and employee satisfaction.

WTA focuses on five major business areas:

- Strategic Sourcing and Supply Chain Analysis and Decision Making
- IT and Shared Services Strategy
- Process Improvement
- Organizational Effectiveness
- Organizational Efficiency

Why choose WillowTree Advisors for Consulting Services?

WillowTree Advisors provides a broad set of services focused on improving the performance of government agencies and other organizations. Our services range from strategic and business planning, business process analysis and improvement to the design of new service delivery models and sourcing processes.

WillowTree brings highly experienced resources to its clients. Our advisors are among the most experienced in the business, each having more than 15 years of leadership, management and business consulting experience. Our recruiting and hiring processes reflect our approach to find the most qualified, experienced advisors of choice for the full range of business improvement projects in both the public and private sectors. We are recognized for the quality of our services, our deeply experienced advisors, and our responsiveness. A majority of our clients engage us for additional work, supporting our strong reputation and the value we provide to our customers.

- **Comprehensive Solutions:** We offer strategy and consulting, as well as tactical implementation and applied facilitation to improve your operations. We draw from a range of practices, including change management, project management, organizational development, and quality initiatives (e.g. Lean, Six Sigma, Baldrige, ISO) to enhance your improvement efforts, meaning *you receive comprehensive guidance though-out the project.*

- **Practical Experience:** Most of our team members have at least fifteen years of experience with state and county governments, as well as commercial organizations, and a history of delivering outstanding results on time and on budget. Theoretical knowledge is important, but firsthand experience in real environments is what helps us develop practical, achievable approaches. This means *you receive the most relevant guidance while feeling confident of a successful engagement.*
- **Flexible Framework:** We don't have a "one size fits all" philosophy. Working with you, we develop a tailored, specific approach based on your needs and wants, as well as industry standards, tools, and templates that work in your environment. We also provide flexible support until your team is ready to assume full responsibility. In other words, *you get what you need, not just what we think you should have.*
- **Industry Expertise:** Our team has significant experience with state and local governments, universities, and federal agencies. We also bring experiences from many private enterprises in industries like health care, transportation, financial, environmental, and services. *You benefit from superior solutions that incorporate the best practices from the public sector with those of some of the most respected commercial businesses.*

WillowTree brings an experienced team and management commitment to deliver outstanding services, applying its strengths to achieve program goals and objectives. We use a collaborative, team approach, which deeply engages with the customer's team to encourage ownership and knowledge transfer to achieve positive benefits and results. We focus on bringing measurable cost savings and performance efficiencies, reduced waste, increased quality of service, and more effective use of information technologies in all our projects. In addition to our ability to evaluate organization function and operational processes while defining and implementing process improvements, we specialize in managing organizational transformation. We believe that the critical components to a successful transformation include focus, traction, commitment, employee adoption and foundation of early successes – we use these tenets to bring success to each project.

Our management approach is to provide a single point of responsibility, the Client Delivery Manager, with the charge of delivering the services and managing customer satisfaction. We carefully select complementary skill sets and bring the best suited advisors to the team to achieve results and deliver services. Our teams work well together and strive to collaborate with your team to achieve lasting, significant results.

WTA's MOBIS Service Offerings

Performance Improvement has become a key focus in both the public and the private sector – improvements in quality, performance, timeliness, effectiveness, efficiency, and cost are top of mind for everyone. WillowTree Advisors focuses on the work and operations of organizations, helping them to think differently about the way they work, while increasing capacity and adding value to those they serve. We focus on eliminating administrative and transactional waste, while helping design and implement processes by directly focusing on achieving desired outcomes for the service recipients. We use Lean practices to dramatically improve the quality, transparency and speed of the organization's processes and help agencies address concerns over increasing demand and limited or diminishing resources. The results will be better service and value for programs and services, while increasing employee and customer satisfaction.

WillowTree Advisors has extensive experience in guiding and assisting clients through management, organizational and business improvement initiatives. We offer services in two SIN areas covered in the GSA MOBIS Federal Supply Schedule to include the following:

- **SIN 874-1:** Consultation Services
- **SIN 874-6:** Acquisition Management Support

Special Item Number Descriptions

WillowTree Advisors offers the following services related to each SIN area:

SIN 874-1 Consultation Services

The WillowTree Advisors team provides comprehensive consulting services that include the following:

- Business, IT and Shared Services Strategy
 - IT and Shared Services Assessments, Strategy, Service Delivery Models, Comparative Analysis
 - Application Portfolio: Assessment, Analysis, Rationalization and Outsourcing Strategy
 - Balanced Scorecard: Design, Development and Implementation Program Mgmt
 - Voice of the Customer Analyses
 - Value Stream Analysis
- Process Improvement
 - Process Assessments and Reengineering: ITIL, Governance and Business Processes
 - Business Process Re-engineering: Lean and Six Sigma Methods, Kaizen Events/RIE, Financial Validation
 - Lean and Six Sigma: Continuous Improvement Initiatives Design, PMO, Training
- Organizational Effectiveness
 - Organization: Assessment, Design
 - Transformation: Strategy, Program and Project Management, Value Stream Analysis
 - Change Management and Communications, and associated Program Management
 - Training Development and Delivery: Leadership, Governance and Sourcing
- Organizational Efficiency
 - Metrics and KPIs: Baseline Identification, Development, Implementation and Monitoring
 - Performance Management Initiative: Design, Development and Implementation
 - Financial Validation: Project Based Tracking, Cost Benefit Analysis

SIN 874-6 Acquisition Management Support

WillowTree Advisors provides professional support services to agencies in conducting federal acquisition management activities. Services provided in this SIN are:

- Strategic Sourcing and Supply Chain Analysis and Decision Making:
 - Acquisition Planning Assistance: Market Research, Procurement Strategy, IT and Business Requirements
 - Transaction Management and Supplier Selection, Service Level and Pricing Negotiations, Project and Program Management
 - Acquisition Document Development: Cost/Price Estimates, Statements of Work, Solicitations, Price Negotiation
 - Proposal Evaluations: Price/Cost Analysis, Technical Proposal Analysis
 - Contract Administration Support: Contractor Performance Reviews, Contract Modifications, and Investigating Contract Discrepancies
- Contract close-out assistance
- Competitive Sourcing Support: Strategic Sourcing Studies, Privatization Studies, Public-Private Partnerships
- Supply Chain Lean Assessments, Benchmarking and Costs Savings Analyses
- Inventory Optimization:
 - Assessment and Modeling
 - Cost Reduction Strategies
 - Program Management
- e-Procurement:
 - e-Procurement Solutions: Requirements, Software Selection and PMO

WillowTree Advisors, LLC Schedule Price List

Price Listing for Labor Categories

Contract Number GS-10F-0002Y

Consulting Services (SINs 874-1)

Acquisition Management Support (SINs 874-6, 874-6RC)

GSA Labor Category	Year 1 10/11/2011 - 10/10/2012
Client Delivery Manager	\$376.84
Lead Consultant	\$301.47
Program Manager	\$252.23
Project Manager	\$192.94
Project Coordinator	\$128.13
Management Consultant 3	\$243.19
Management Consultant 2	\$226.10
Management Consultant 1	\$218.06
Senior Associate	\$150.74
Associate	\$136.67
Financial Analyst	\$185.91
SME 3	\$213.54
SME 2	\$205.00
SME 1	\$200.98
Publication Specialist/ Graphics Artist	\$125.61
Editor	\$102.50

Notes:

1. Includes 0.75% IFF
2. Annual Escalation for Contract Years 2 -5 are based up a agreed upon index BLS Economic Cost Index for Private Industry, Professional and Business Services, CIU201540A000000A(BI), to be determined annually by contract modification.

Labor Category Descriptions

Category	Educational Requirements	Functional Responsibility
Client Delivery Manager	Masters Degree or Bachelors with 5 years of related experience	Manages the overall delivery of services under a contract, provide quality assurance of all deliverables and assurance of customer satisfaction. Maintains liaison with the client throughout all project stages.
Lead Consultant / Sr. Program Manager	Masters Degree or Bachelors with 5 years of related experience	Works with the sponsoring organization to determine the larger business scope and strategic goals to be supported by a program or set of projects. Assists in parsing the initiatives required into coherent programs and/or sets of projects. Specifies the broad business benefits to be achieved by the program/projects and the timelines for achieving them.
Program Manager	Bachelor's degree in business, IT or related field PMP Certification or Equivalent Experience	The basic function of the Program Manager is to manage and oversee a group of related projects to assure that they are coordinated, integrated and produce the collective results they were chartered to produce. Reports project progress to project sponsor organization. Manages a group of project managers. Maintains primary interface with client Program Managers.
Project Manager	B.A. required. Advanced degree preferred. PMP Certification	The basic function of the Project Manager is to achieve project objectives through management of people, application of professional tools, techniques and knowledge. To document and report project progress, troubleshoot issues and problems, evaluate project staff and liaise with the project sponsoring organization.
Project Coordinator	BA preferred	The basic function of the Project Coordinator is to support the project and project teams in the achievement of project goals. Arranges meetings, coordinates between team members, organizes schedules, handles logistics and documentation
Management Consultant 3	B.A. required. Advanced degree preferred.	Performs analysis and develops recommendations to improve an organization's structure, operations, capabilities and overall profits. Provides guidance and expert advice on technical or process-related topics. Organizes and consolidates analyses and recommendations by other team members and junior staff. Senior Level Management Consultants perform their assigned duties including the coaching, training and oversight of junior staff.
Management Consultant 2	B.A. required. Advanced degree preferred.	Performs analysis and develops recommendations to improve an organization's structure, operations, capabilities and overall profits. Provides guidance and expert advice on technical or process-related topics. They must identify the underlying principles, reasons and facts of information by breaking down information.

Category	Educational Requirements	Functional Responsibility
Management Consultant 1	B.A. required. Advanced degree preferred.	Performs analysis and develops recommendations to improve an organization's structure, operations, capabilities and overall profits. Provides guidance and expert advice on technical or process-related topics. Performs assigned duties under the supervision of Senior Level Management Consultants.
Senior Associate	B.A. preferred or 5 years related experience	Provides expertise in specialty area under the guidance and supervision of Senior Level Management Consultants
Associate	B.A. preferred or 5 years related experience	Provides expertise in specialty area under the guidance and supervision of Senior Level Management Consultants
Financial Analyst	B.A. required. Advanced degree preferred.	Provides expertise in specialty area under the guidance and supervision of Senior Level Management Consultants
SME 3	Masters degree or equivalent experience in business, IT, science, finance or related field.	Uses a wide application of principles, theories, concepts and techniques to develop innovative solutions to complex problems. Provides expert assistance and guidance in support of programs and projects. Applies expert knowledge to gather facts, research and analyze data, and develop conclusions and recommendations
SME 2	Masters degree or equivalent experience in business, IT, science, finance or related field.	Uses a wide application of principles, theories, concepts and techniques to solve problems related to customer requirements. Provides expert advice as it relates to area of specialty. Applies knowledge to gather facts, research and analyze data, and develops recommendations
SME 1	BS or BA degree or equivalent experience in business, IT, science, finance or related field	Uses a wide application of principles, theories, concepts and techniques to solve problems related to customer requirements. Provides expert advice as it relates to area of expertise. Applies expert knowledge to gather facts, research and analyze data, and develops recommendations
Publication Specialist / Graphic Artist	B.A. required or equivalent work experience	Works with team members to produce contract deliverables, reports, solicitation documents or operational documentation. Formats documents, builds and manages standard templates and style sheets, produces document layouts and graphics.
Editor	B.A. required or equivalent work experience	Works with team members to produce contract deliverables, reports, solicitation documents or operational documentation. Reviews and edits content, and writes executive summaries and other content.

Placing Orders for Services

GSA provides a streamlined, efficient process for ordering services. GSA has determined that WillowTree Advisors meets the technical and experience requirements and that the prices offered are fair and reasonable. Agencies may use written order, FAX orders, blanket purchase agreement orders or individual purchase orders under this contract.

To use this contract to order services from WillowTree Advisors, follow these steps:

- **Develop a Statement of Work to include:**
 - Work to be performed
 - Location of Work
 - Period of Performance
 - Deliverables and Deliverable Schedule
 - Special Standards and requirements, as applicable.
- **Select a Contractor and Place the Order**
 - If the order is at or below the micro-purchase threshold, select the contractor best suited for your needs and place the order
 - If the order exceeds the micro-purchase threshold, but is less than the Maximum Order(MOT), prepare and RFQ
 - If the order exceeds the MOT, prepare an RFQ
- **Prepare a Request for Quote (RFQ)**
 - Include the SOW and the evaluation criteria
 - Request fixed price, ceiling price, or if not possible, labor hour/time and materials order
 - If preferred, request a performance plan from contractors and information on past experience, and may include information on the basis of selection
- **Send RFQ to at least Three Firms**
- **Evaluate Offers, Select Best Value Firm, and Place Order**

Points of Contact

Program Manager:

Kathryn Douglass
3773 Cherry Creek North Drive Suite 575
Denver Colorado, 80209
Phone: 888.998.0008
Email: kathryn.douglass@willowtreeadvisors.com

Contract Manager:

Tobin Threadgill
3773 Cherry Creek North Drive Suite 575
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