



ikaso

MAS (Multiple Award Schedule) Industrial Group: Professional Services

General Service Administration | Federal Acquisition Service |
Authorized Federal Supply Schedule FSS Price List

Contract Number

47QRAA18D0015

Contract Period

11/2/2017 – 11/1/27

Contractor

Ikaso Consulting, LLC.
533 Airport Blvd.
Suite 400
Burlingame, CA 94010
www.ikasoconsulting.com

Contractor Contact

Reiko Osaki
President and CEO
Phone: 415-734-6858
Fax: 415-520-2662
Email: rosaki@ikasoconsulting.com

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 GSA Advantage! is: GSA Advantage.gov.

*For more information on ordering on ordering go to the following website: <https://www.gsa.gov/schedules>.
Price list current as of Modification #PA-0015 effective 03/28/2023*

1.0 Customer Information

Section	Information Request	Ikaso Reponse
1a	SINs 541611 Recovery 541611RC OLM OLMSTLOC OLMRC	Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services Order-Level Materials
1b	Lowest Priced Model	See page 14
1c	Labor Rates	See page 14
2	Maximum Order	\$1,000,000
3	Minimum Order	\$100
4	Geographic Coverage	Domestic
5	Point(s) of Production	N/A
6	Discount from list prices or statement of net price	Prices are net prices and include all discounts and fees
7	Quantity Discounts	None
8	Prompt Payment Terms	0%, Net 30 days. Information for Ordering Offices: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions
9	Foreign Items	N/A
10a	Time of Delivery	Determined by the Ordering Agency



Section	Information Request	Ikaso Reponse
10b	Expedited Delivery	N/A
10c	Overnight Delivery	N/A
10d	Urgent Requirements	N/A
11	F.O.B. Points	Destination
12a	Ordering Address	Reiko Osaki President and CEO 533 Airport Blvd., Suite 400 Burlingame, CA 94010
12b	Ordering Procedures	Orders are placed directly with the individual listed above
13	Payment Address	Ikaso Consulting LLC 533 Airport Blvd., Suite 400 Burlingame, CA 94010
14	Warranty Provision	N/A
15	Export Packing Charges	N/A
16	Terms & Conditions - Rental, Maintenance, and Repair Terms	N/A
17	Terms & Conditions - Installation	N/A
18a	Terms & Conditions - Repair Parts	N/A
18b	Terms & Conditions - Other Services	N/A
19	Service Distribution Points	N/A
20	Participating Dealers	N/A



Section	Information Request	Ikaso Reponse
21	Preventative Maintenance	N/A
22a	Special Attributes	N/A
22b	Section 508 Compliance	N/A
23	Unique Entity Identifier (UEI) Number	KV95SMKGKDC8
24	Notification regarding registration in System for Award Management (SAM) database	Ikaso Consulting LLC is registered in the System for Award Management (SAM) Database

2.0 Introduction

Ikaso Consulting, LLC (Ikaso) is a leader in serving the public sector by solving procurement, strategy, and operational challenges.

Since Ikaso's founding in 2008, our team has worked closely with government executives and program administrators. We assist public organizations, including Medicaid and human services programs, to better serve their constituents.

Our breadth of government experience, commitment to quality and client satisfaction, and flexibility to adapt to client needs differentiates Ikaso. We have a proven track record of successful projects, exceptionally positive client references, and significant value created for each of our clients.

Ikaso's professionals have backgrounds from management consultancies, public sector procurement, state government, and human resources organizations, and health care organizations. We offer deep domain knowledge in healthcare, social services, and administrative program areas.



Procurement Program Design

Ikaso helps clients transform and reorganize their public sector programs through collaborative procurement design. Our team conducts a business process assessment to analyze program design. We pair our tailored analyses with a deep knowledge of procurement laws and procedures. The Ikaso approach has helped public sector organizations to reform their organizational strategy and procurement process.





Procurement Strategy & Execution

Ikaso offers end-to-end procurement strategy and execution for clients at every level of government. Our dynamic team works with clients from the start of the procurement process, offering benchmarking and market analysis support, through to scope of work and solicitation development, as well as negotiation strategy and protest mitigation efforts. Ikaso's expertise also includes strategic procurement support, supplier diversity program development, and procurement training. We ensure that our clients utilize best practices to obtain high-quality goods and services at competitive prices.



Contract Management Support

Ikaso provides comprehensive contract management support. We build customized tools to help our clients monitor complex contracting processes, validate savings, and manage vendors. Our team provides analyses of existing systems and assists our clients in solidifying best practices. We help clients identify savings opportunities by supporting coordinated procurement initiatives and contract renegotiation efforts. Our analysis informs and empowers clients to implement strategies that optimize savings and service delivery. Our work helps clients ensure that public funds are well spent and services are delivered.



Grants Development & Management

Ikaso offers effective support on grants development and management. We collaborate with clients and stakeholders to develop innovative grant applications that convey their values and goals, including Requests for Funding. Ikaso provides structured support throughout the grant development process, with expertise in budget and narrative formulation, as well as funds monitoring and reporting. Ikaso's approach enables clients to effectively and efficiently distribute funds that meet the needs of communities.

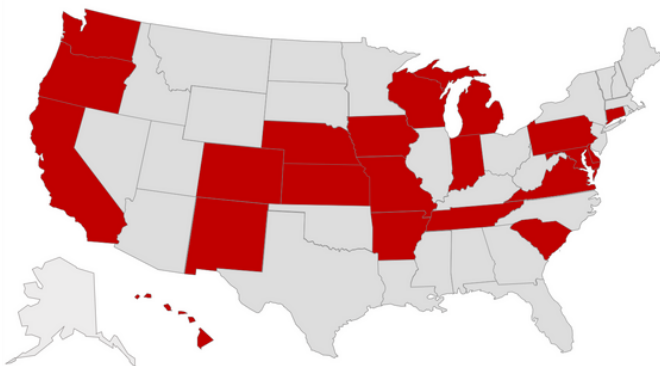


Strategic Initiatives & Executive Support

Ikaso provides executive support and works closely with clients on strategic initiatives and organizational priorities. Our team assists clients with strategic plan development and stakeholder engagement, including project and change management, workload analysis and optimization, process, policy and legislative review, cross-sector alignment and workshop facilitation. We help our clients realize their goals and our analysis informs executive decision-making from inception to implementation.



2.1 Ikaso at a Glance



Ikaso's independence prevents conflicts of interest.

Ikaso's status as an independent company with a primary focus on procurement consulting averts conflicts of interest during our execution of all client acquisition projects. There are no other business areas at Ikaso that might bid on other types of contracts and, thus, Ikaso's potential conflicts are completely minimized.

- Ikaso has exclusively served public-sector clients for 12 years.
- Our seasoned team has over 170 years of combined experience with 21 state governments. Our coverage spans the entire nation, from Delaware to Hawaii.
- We have created over \$230 million in total contract-length savings for our clients.
- Our team has specific expertise in procurement program design, procurement strategy and execution, contract management support, grants development & management, and strategic initiatives & executive support. We also have domain expertise in child services, public health, complex IT systems, Medicaid and healthcare programs, human services, health and human services programs and administrative and business operations.
- Ikaso is an independent minority and woman-owned business.
- A map showing Ikaso team member experience across the nation is provided on the left.

2.2 Ikaso's Services

Ikaso delivers the visibility, control, and insights that public sector executives need to manage and optimize their organizations' operations. The table below provides an overview of our suite of services, which help our clients design and implement organization and procedural changes that improve performance, create savings and efficiencies, and deliver on the mission statement of the client.



Procurement Program Design

- Program transformation/reorganization
- Business process assessment
- Procurement law, rule, policy, and process reform
- Organization strategy, benchmarking, design, and reform





Procurement Strategy & Execution

- End-to-end strategic sourcing execution
- Contract analysis and benchmarking
- Market research and benchmarking
- Spend analysis and reporting
- Go-to-market strategy
- Request for Proposal (RFP) and other solicitation methods (RFI/RFQ/RFS, etc.)
- Scope of work and specifications development
- Evaluation strategy development and facilitation
- Procurement staff and evaluator training
- Negotiation strategy
- Protest mitigation strategies
- Diverse supplier program development and support
- Strategic sourcing training module development and delivery



Contract Management Support

- Contract management process analysis
- Contract monitoring processes and tools
- Savings validation processes and tools
- Vendor management tools and training



Grants Development & Management

- Request for Funding/grant application development
- Narrative and budget development
- Funds monitoring and reporting
- COVID-19 grants
- Health information exchange grants



Strategic Initiatives and Executive Support

- Budget opportunities support (savings opportunities, contract renegotiations)
- Strategic Plan development and stakeholder engagement
- Workgroup facilitation
- Leadership team workshops and strategy summit facilitation
- Strategic communications
- Workload and staffing analysis and optimization
- Coordinated procurement initiatives across state and local governments (e.g., K-12 entities, cities and towns, higher education entities)
- Project management
- Change management support



2.3 Domain Expertise

Ikaso's professionals have backgrounds in management consultancies, public sector acquisition departments, human resources organizations, and healthcare and human services organizations. We provide deep domain knowledge in healthcare, human services, and administrative program areas.

For health care and human services, we bring experience in three main areas: program services, IT systems, and operations. Please see below for a sample of our past projects.



HHS IT

- Case management systems
- Comprehensive child welfare systems (CCWIS)
- Child support systems
- Data warehouse
- Electronic medical records
- Enrollment and eligibility systems
- Medicaid Management Information Systems (MMIS)



Child Services

- Child welfare
- Child support
- Early childhood care and education
- K-12 education
- Pre-K



Public Health

- Centers for Disease Control (CDC) grants
- COVID-19 response activities
- Vaccine management information system
- Women, Infants, and Children (WIC)



Medicaid / Healthcare Programs

- Disability services
- Enrollment broker
- Fraud, waste, and abuse
- Home and community-based services (HCBS) waivers/programs
- Long term care
- Medicaid managed care organizations (MCOs)
- Mental health and substance use disorder programming
- Pharmacy benefits management (PBM)
- Prior authorization
- Rate setting



Human Services

- Adult protective services
- Electronic Benefits Transfer (EBT)
- Eligibility and enrollment
- Human services/non-profit grantor support
- Supplemental Nutrition Assistance Program (SNAP)
- Temporary Assistance for Needy Families (TANF)



Additionally, we have experience working directly with administrative services divisions in the capacities listed below.



Administrative & Business Operations

- Agency-specific or enterprise-wide strategic sourcing of products and services
- Coordinated acquisition initiatives across state and local governments (e.g., K-12 entities, cities and towns, higher education entities)
- Contract monitoring and savings validation
- E-catalog implementation and optimization support
- Minority/women/veteran-owned business program and small business program support
- Acquisition agency reform
- Strategic Sourcing. Examples:
 - Advertising and Public Relations
 - Background Checking Services
 - Copy Paper
 - E-books
 - Educational testing
 - Food/Cafeteria Services
 - Furniture
 - Hearing Aids
 - Incontinence Supplies
 - Inmate Medical Services
 - Janitorial Supplies
 - Mail Room Equipment
 - Maintenance, Repair, and Operations
 - Office Equipment
 - Office Supplies
 - Paint
 - Pest Control
 - Purchasing and Stored Value Cards
 - PC Hardware
 - Printing and Mailing Services
 - Radio Equipment
 - Road Salt
 - Software
 - Vehicles
 - Vehicles Maintenance and Supplies
 - Temporary Staffing

3.0 Special Item Number (SIN) Category 541611 Experience

3.1 Integrated Consulting Services

SIN Category 541611 GSA Description: Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services provide operating advice and assistance on administrative and management issues. Examples include: strategic and organizational planning, business process improvement, acquisition and grants management support, facilitation, surveys, assessment and improvement of financial management systems, financial reporting and analysis, due diligence in validating an agency's portfolio of assets and related support services, strategic financial planning, financial



policy formulation and development, special cost studies, actuarial services, economic and regulatory analysis, benchmarking and program metrics, and business program and project management. Inherently Governmental services as identified in FAR 7.503 or by the ordering agency are prohibited. It is the responsibility of the Contracting Officer placing the order to make this determination. Ordering activities must require prospective contractors to identify potential conflicts of interest and address those, prior to task order award. Personal services as defined in FAR 37.104 are prohibited.

Ikaso provides a broad range of integrated consulting services to our clients.

Our organizational flexibility and breadth of knowledge allow us to address our clients' diverse needs and deliver tangible results.

For one government client, Ikaso assisted with a legislatively-mandated consolidation of the client's procurement of goods and services acquisition teams. As part of this project, Ikaso recommended changes to procurement statutes, rules, policies, and procedures and proposed a new procurement organization structure new job descriptions, duties, and an overall transition plan to aid in the implementation of best practices.

At the request of the client, we were asked to further support the follow-up development of a customized training program for their procurement staff. We also helped to procure and implement an e-procurement software solution.

Ikaso supported another state client in the expansion of their Medicaid program for individuals dually eligible for Medicare and Medicaid. Ikaso's responsibilities included:

- Assistance in various member/provider/health plan outreach efforts, including planning, data analyses, materials creation and review
- Initial review of all plan-submitted marketing material against Centers for Medicare & Medicaid Services (CMS) guidance
- Coordination of state team's review of all materials
- Consulting services related to the client's waiver programs
- Development of health plan and provider training materials
- Assistance with operational dashboards and documentation

“ I have worked closely with the Ikaso team on a variety of projects and have found the team highly strategic and analytical, bringing great value to the initiatives they lead. I look to the Ikaso team as trusted advisors and skilled tacticians, playing both roles with exceptional communications skills, great team work, and strong abilities that consistently exceed our expectations.

”
Commissioner, Department of
Administration, State Government Client



3.2 Acquisition Management Support

GSA Description: Contractors shall provide professional support services to agencies in conducting federal acquisition management activities. Services covered by this SIN are: acquisition planning assistance, including market research and recommending procurement strategy; acquisition document development, including cost/price estimates, quality assurance surveillance plans, statements of work, synopses, solicitations, price negotiation memoranda, etc.; expert assistance in supporting proposal evaluations, including price/cost analysis or technical proposal analysis; contract administration support services, including assistance with reviewing contractor performance, developing contract modifications, and investigating reports of contract discrepancies; contract close-out assistance; 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.

Ikaso provides full-spectrum acquisition support, from strategic planning of acquisitions to contract negotiation and performance evaluation. Our expertise in public sector processes, and our working relationships with both program staff and acquisition staff, allow us to coordinate critical organization-wide projects and support priority initiatives. For one state government client, Ikaso provides support for a coordinated strategic sourcing program that includes participation from local governments and schools. Ikaso assists with workstream prioritization, oversight meetings, data collection support and analysis, and staff training.

“

It is critical to ensure project teams include all the right people from my agency and other government departments. When Ikaso is involved, everyone speaks the same language and pursues a common goal of negotiating the best contracts with the highest service levels at the lowest reasonable price. Putting the best programs in place while responsibly stewarding taxpayer dollars happens with Ikaso.

”

Secretary, Health and Human Services
Department, State Government Client

Additionally, Ikaso supports the client with the preparation and execution of RFPs by consulting on acquisition strategy, developing the RFP documents, drafting answers to vendor questions, supporting evaluations, and assisting with negotiations and contract drafting.

Ikaso assists clients with all aspects of post-award contract management. This includes quality assurance for a vendor's deliverables, vendor management and performance measurement, and contract amendment and renegotiation. We develop contract management tools to help the client track and report on such post award contract management activities and findings to facilitate executive decisions on vendors and contracts.





For projects that require federal review and approval, Ikaso supports the development of federally mandated materials while monitoring high-level legislative and regulatory changes. For example, when a client implemented an enterprise data warehouse, Ikaso led the effort to answer questions from the Centers for Medicare & Medicaid (CMS) and the Food and Nutrition Service (FNS) during the RFP drafting. During the acquisition lifecycle, Ikaso helped provide information to update federal entities.

3.3 Integrated Business Program Support Services

GSA Description: Contractors shall provide services to assist agencies in managing their mission-oriented business projects or programs and achieving mission performance goals. Services covered by this SIN include:

- All phases of program or project management, from planning to closeout.
- Operational/administrative business support services in order to carry out program objectives.

Ikaso offers a range of support services to aid public-sector entities as they adapt to shifting program goals, stakeholder needs, and state and federal requirements. Our long-term partnerships with clients allow us to assist in managing projects and programs as they develop through new administrations and changing priorities.

Ikaso partnered with one state's Medicaid program to provide strategy and project support for the program's mission critical, high-visibility transformation to statewide managed care. Ikaso assisted the client agency with its transition from a Medicaid fee-for-service model to a managed care

“Ikaso consultants are exceptional in their ability to facilitate key projects statewide and provide visibility and insight into critical issues that contribute to project success. Thanks to their efforts, we have experienced strong results both in terms of achieving cost savings and avoiding vendor complaints and protests.”

Commissioner, Department of Administration, State Government Client



model by supporting existing contract evaluation and re-alignment, end-to-end acquisition support for managed care organizations, and subsequent contract monitoring functions.

Additionally, Ikaso supports business process studies, including such responsibilities as workload distribution assessments, interviews with staff and stakeholders, data analyses, and recommendation and report writing for client use.

4.0 Ikaso's Approach

Ikaso pursues values-driven work to improve the lives of children, families, and communities through public sector initiatives.

A team of people with shared trust and respect, we leverage years of lived experiences and professional expertise to serve. We analyze complex problems to serve and partner with our public sector clients. Ikaso sees strategic value at the intersection of procurement, contract negotiations, and agency operations; our team is constantly adapting to meet the challenges of the moment. From finding the right words to effectively engage key stakeholders to partnering with our clients to consider the best use of resources to structuring and executing a critical procurement or contract negotiation, we are always strategizing to benefit those we are privileged to serve.

We tailor our work to each client's specific needs.

We approach each client with curiosity and collaboration to continually learn and consider the landscape informing a project. We strive to understand and embrace their unique circumstances and requirements. Our first order of business is to become familiar with their specific environment, including priorities, needs, statutes, rules, and policies. This ensures our strategy, findings, deliverables, and recommendations address the specific needs of the client. On every project, we collaborate with the client to define project goals and performance measures.

The Ikaso team prioritizes excellence and integrity.

Because Ikaso only serves public sector clients, we understand the need for transparency, civic engagement, and accountability in our projects. We ensure our work product can withstand public scrutiny and help the client mitigate protest and other forms of risk.

We integrate extensive quality management processes in all our projects.

The Ikaso team delivers the highest quality work products with sustainable results by utilizing an established end-to-end quality management approach. While we rely on the successes of our past engagements to offer frames of reference for our projects, we never assume that what works for one client will work for another. The responsible owner of a deliverable works collaboratively with the project team to leverage their experience and expertise. All team members are actively engaged throughout the process in identifying risks and issues, which we discuss in project meetings along with mitigation strategies and solutions. If an issue cannot be solved initially within the project team, the issue is escalated to senior Ikaso subject matter experts, who identify solutions, additional resources, or analysis. Once an initial deliverable



draft is complete, it is subjected to a peer review. Review from an experienced Ikaso team member uninvolved with the project provides a beneficial external perspective of our work products prior to client review.

Acquisition reform projects are based on comprehensive review.

To identify, address, and implement acquisition improvements, we study several areas of the organization or program, including its policies, business processes, organizational structure, staffing allocations, staff skills, training plans, and technology solutions. Our approach is tailored to account for the complex interplay among client departments, and state, local, and federal stakeholders, which can include funding rules, policies, review and approval processes, and ultimately operational guidelines.

We address client goals from inception to implementation.

We believe that if a recommendation cannot be implemented to enable lasting, sustainable results, our work is incomplete. Our approach incorporates an emphasis on planning and supporting implementation, acting as a lead or support. Dedicating time to considering the goals of each stage of the acquisition lifecycle, including measurement of performance and outcomes, is an important factor for contract success. Our clients can have confidence that our full acquisition lifecycle approach will enhance accountability, improve effectiveness and performance, shift the balance of power to the client in client-vendor relationships, and decrease financial risks.

5.0 Labor

5.1 Labor Categories

Director

Functional Responsibilities

A Director is responsible for overall successful project delivery as well as relationship management with client leadership. He/she provides subject matter expertise (particularly with respect to key issues, political sensitivities, and high-risk areas), draws on extensive experience to assist with recommendation development and prioritization, supports external and internal stakeholder engagement, and leads strategic meetings with the client executive team. He/she works with client leaders to set strategic direction for the project, define expectations, and manage scope changes.

Education, Experience, and Certification

A Director holds a Bachelor's degree or equivalent. M.B.A. or other Master's degree is preferable. A Director possesses a minimum of ten years of experience, including experience in management consulting, project management, workgroup facilitation, and data analysis. A Director also has several years of relevant public sector experience, either as a government staff member or a consultant.



5.2 Labor Rates

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

Ikaso's Year 1 base rate is \$174.00 exclusive of the Industrial Funding Fee (IFF), and \$175.31 inclusive of the IFF, across all labor categories. The table below provides Ikaso's hourly rates per labor category, inclusive of IFF, for each contract year.

Category	Year 6 (11/1/22 - 10/31/23)	Year 7 (11/1/23 - 10/31/24)	Year 8 (11/1/24 - 10/31/25)	Year 9 (11/1/25 - 10/31/26)	Year 10 (11/1/26 - 11/1/27)
Director	\$195.48	\$199.78	\$204.17	\$208.66	\$213.26

Escalation Rate: 2.2 percent fixed annual escalation rate based on EPA clause I-FSS969 (b)(1)

