

Third Party Consulting
Solicitation Number 5400015645

Contract Period:
01/08/2019 – 01/07/2024

[Contract Terms & Conditions](#)

SFAA ITMO Procurement Manager

Kristen Hutto
(803) 737-7685
khutto@mmo.sc.gov

Last Updated: 01/08/2019

CONTRACTORS

[Ahead, LLC](#)
[The Autumn Group, LLC](#)
[BerryDunn](#)
[Coeur Business Group, Inc.](#)
[Deloitte Consulting, LLP](#)
[Elyon Enterprise Strategies, Inc.](#)
[Ernst & Young, LLP](#)
[Gartner, Inc.](#)
[Grant Thornton, LLP](#)
[Ikaso Consulting, LLC](#)
[ISG Public Sector](#)
[JDR Consulting, LLC](#)
[Public Consulting Group](#)
[Random Bit, LLC](#)

CONTRACT OVERVIEW

These contracts are for the performance of approved [Consulting and Assessment](#) services performed by specified [Personnel Category](#) resources as outlined in the solicitation. UGUs will identify their consulting needs, request, receive, and evaluate potential consulting service solutions, select a Contractor, and formalize the specifics to fulfil their stated needs utilizing the [Job Order Process](#). A fully executed and complete Job Order should be attached to the purchase order to be incorporated into the contract.

KEY CONTRACT NOTES

- These contracts are for consultants to assess the financial management, operational management, and knowledge management of UGUs. The results of the assessment must be documented in a management report that will outline recommendations to improve UGU performance, reduce operational cost, and enhance the quality and effectiveness of UGU programs and services.
- The Contractor's offered hourly rates include all travel and expenses.
- The Contractor may offer lower hourly rates than their established contract hourly rate in a Job Order Quote at their discretion. In no event may they offer an hourly rate for a Personnel Category that is higher than their contract hourly rate.
- This contract **WILL NOT** be used to perform or provide the acquisition, installation, or implementation of hardware, software, and/or additional services and/or products that were reported in the Contractor's final assessment report.

CONSULTING & ASSESSMENT CATEGORIES

See Section III of the solicitation document for detailed descriptions of these categories and specific "Consulting Services Within General Scope" outlined.

- **Operational Management** is the function responsible for the overseeing, designing, and controlling of the business processes that ensures business operations are efficient and effective.
- **Financial Management** is the sound stewardship of the monetary resources of the organization. Within an organization it is visible in three main processes: budgeting, accounting, and charging.
- **Knowledge Management** is the transferring of information from one source to be identified, stored centrally, and transferred within an agency.

JOB ORDER PERSONNEL CATEGORIES

See the solicitation document for detailed descriptions of applicable skill sets, education, and experience requirements for each category.

- Junior Associate
- Intermediate Associate
- Senior Associate
- Junior Consultant
- Intermediate Consultant
- Senior Consultant
- Intermediate Analytical Consultant
- Senior Analytical Consultant
- Intermediate Engagement Manager
- Intermediate Lead Engagement Manager
- Senior Engagement Principal
- Intermediate Engagement Quality Assurance
- Intermediate Enterprise Architect
- Senior Enterprise Architect
- Intermediate Systems Engineer
- Senior System Engineer
- Intermediate Training Specialist

Note: Not all Contractors offer all Consulting and Assessment Categories. Additionally, not all Contractors offer all Personnel Categories within a Consulting and Assessment Category. Check the "Contract Pricing by Personnel Category" link for each Contractor to see what Consulting and Assessment Categories and corresponding Personnel Categories are available.

JOB ORDER PROCESS

The Job Order Process summarized below must be utilized to select a Contractor and issue purchase orders under these contracts. See Section VIIB "Job Orders" provision in solicitation for details.

Step 1. Statement of Work (SOW) Development – UGU must draft the SOW utilizing [this template](#).

Step 2. Job Order Request (JOR) – UGUs must fill out this [JOR form](#), attach the completed SOW from Step 1, and send to a minimum of two Contractors requesting responses.

Step 3. Job Order Quote (JOQ) – Contractors must respond to JORs with either: (1) a JOQ that, at minimum, includes the Contractor's: (a) proposed methodology and Personnel Category resource(s) to best meet the needs outlined by the UGU in the SOW, (b) proposed number of hours per proposed Personnel Category resource, and (c) the Contractor's offered hourly rates per Personnel Category; or (2) a letter electing not to respond that outlines their reasons for declining to provide a JOQ to the UGU by the date designated in the JOR. **The JOQ must not contain any additional terms and conditions.**

Step 4. JOQ Review, Selection, & Negotiation – JOQs are reviewed by the UGU. The lowest price JOQ will be selected unless otherwise justified in writing. Upon selection of the Contractor, negotiations may be conducted but are limited to price only.

Step 5. Job Order Execution – To memorialize the Job Order, the Contractor and the UGU must execute the [Job Order form](#) complete with all applicable Exhibits as finalized between UGU and Contractor. All final Job Orders must be signed by the SFAA IT Procurement Manager prior to issuing the purchase order and commencing performance.

Step 6. Change Management – For the duration of the Job Order, all modifications must be documented with the [Job Order Modification form](#). If a Job Order Modification alters the total Job Order Price by more than ten percent, the SFAA IT Procurement Manager must countersign the Job Order Modification.

CONTRACT 4400020275

Contractor: Ahead, LLC
Vendor Number: 7000258000

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Will Moncrief
(704) 989-1785
will.moncrief@ThinkAHEAD.com

CONTRACT 4400020276

Contractor: The Autumn Group, LLC
Vendor Number: 7000256055

Awarded Consulting & Assessment Categories

- Operational Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Kelly Montgomery
O: (919) 893-3500
C: (919) 274-8808
kelly@theautumngroupllc.com

CONTRACT 4400020274

Contractor: BerryDunn
Vendor Number: 7000050411

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Kevin Scheirer
(207) 541-2200
pqcv@berrydunn.com

CONTRACT 4400020277

Contractor: Coeur Business Group, Inc.
Vendor Number: 7000179437

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Daniel McLane
(321) 313-0344
Dan.Mclane@coeurgroup.com

CONTRACT 4400020279

Contractor: Deloitte Consulting, LLP
Vendor Number: 7000222536

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Steve Hall
(803) 767-1102
stevehall@deloitte.com

CONTRACT 4400020290

Contractor: Elyon Enterprise Strategies, Inc.
Vendor Number: 7000264723

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Karen Morphy
(916) 952-7789
karenmorphy@elyonstrategies.com

CONTRACT 4400020291

Contractor: Ernst & Young, LLP
Vendor Number: 7000097650

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Chris Estes
(919) 791-1656
chris.c.estes@ey.com

CONTRACT 4400020292

Contractor: Gartner, Inc.
Vendor Number: 7000145882

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Rick Nessel
(917) 862-4573
richard.nessel@gartner.com

CONTRACT 4400020294

Contractor: Grant Thornton, LLP
Vendor Number: 7000078526

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Scott King
(210) 881-1802
scott.king2@us.gt.com, and copy PubSecStateandLocalGovtContracts@us.gt.com

or

Christian Fuellgraff
(513) 345-4524
christian.fuellgraf@us.gt.com and copy PubSecStateandLocalGovtContracts@us.gt.com

CONTRACT 4400020295

Contractor: Ikaso Consulting, LLC
Vendor Number: 7000220727

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Reiko Osaki
(415) 734-6858
rosaki@ikasoconsulting.com

CONTRACT 4400020296

Contractor: International Consulting Acquisition Corp DBA ISG Public Sector

Vendor Number: 7000246603

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Milford Sprecher

(301) 830-2198

Milford.sprecher@isg-one.com

CONTRACT 4400020297

Contractor: JDR Consulting, LLC

Vendor Number: 7000264901

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Mandy Cooke

(888) 481-7755 x816

mcooke@jdrconsulting.net

CONTRACT 4400020301

Contractor: Public Consulting Group

Vendor Number: 7000096520

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management
- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Eugene (Geno) Astarita

O: (512) 777-5417

M: (512) 808-9084

eastarita@pcgus.com

CONTRACT 4400020302

Contractor: RandomBit, LLC

Vendor Number: 7000231588

Awarded Consulting & Assessment Categories

- Operational Management
- Financial Management

- Knowledge Management

[Contract Pricing by Personnel Category](#)

Send Job Order Requests to:

Susanne Ungerer

(704) 207-1716

susanne@randombitcorp.com