

(Contract Management Use only)

# CONTRACT APPROVAL FORM

CONTRACT TRACKING NO.

CM1611

## CONTRACTOR INFORMATION

Name: TriData Division/System Planning Corporation

Address: 100 Wilson Blvd. 30<sup>th</sup> Floor Arlington, VA 22209  
City State Zip

Contractor's Administrator Name: Patrick Simpson Title: Senior Program Manager

Tel#: (703)351-8300 Fax#: (703) 351-8383 Email: plsimpson@sysplan.com

## CONTRACT INFORMATION

Contract Name: Fire & EMS Assessment and Strategic Plan Contract Value: \$40,000.00

Brief Description: Pursuant to the award made by the Board of County Commissioners on 06/09/10 (Bid No. NC09-011); Piggyback off of GSA MOBIS Contract GS-10F-0350M for TriData to provide a Fire & EMS Assessment and Strategic Plan. TriData specialized in research, analysis, and management studies in fire protection, EMS, and prevention and public safety.

Contract Dates : From \_\_\_\_\_ to \_\_\_\_\_ Status:  New  Renew  Amend#  WA/Task Order


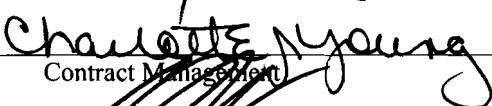
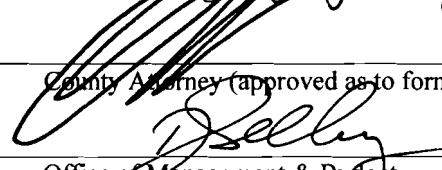
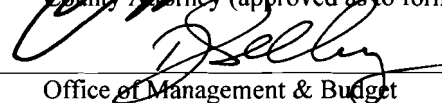
How Procured:  Sole Source  Single Source  ITB  RFP  RFQ  Coop.  Other \_\_\_\_\_

### If Processing an Amendment:

Contract #: \_\_\_\_\_ Increase Amount of Existing Contract: \_\_\_\_\_ No Increase

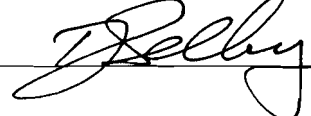
New Contract Dates: \_\_\_\_\_ to \_\_\_\_\_ TOTAL OR AMENDMENT AMOUNT: \_\_\_\_\_

### APPROVALS PURSUANT TO NASSAU COUNTY PURCHASING POLICY, SECTION 6

- |    |   |                |                                    |
|----|---|----------------|------------------------------------|
| 1. |  | <u>6/18/10</u> | 04223522-531000<br>01261526-531000 |
|    | Department Head Signature   | Date           | Funding Source/Acct #              |
| 2. |  | <u>6/18/10</u> |                                    |
|    | Contract Management   | Date           |                                    |
| 3. |  | <u>6/25/10</u> |                                    |
|    | County Attorney (approved as to form only)  | Date           |                                    |
| 4. |  | <u>6/28/10</u> |                                    |
|    | Office of Management & Budget   | Date           |                                    |

Comments: \_\_\_\_\_

### INTERIM COUNTY MANAGER - FINAL SIGNATURE APPROVAL

 6/28/10  
 Ted Selby Date

### RETURN ORIGINAL(S) TO CONTRACT MANAGEMENT FOR DISTRIBUTION AS FOLLOWS:

- Original: Clerk's Services; Contractor (original or certified copy)
- Copy: Department
- Office of Management & Budget
- Contract Management
- Clerk Finance

RECEIVED  
 CONTRACT MANAGEMENT  
 2010 JUN 29 AM 11:06



Action: Aye: Commissioners Boyle, Holloway, and Boatright.

Absent: Commissioners Leeper, and Johnson.

Follow Up: Finance, OMB, County Manager Designee, Extension Services



RS100609 - 10:22:28 Expansion Item #2: Approve to delete the input from one of the three reviewers of the proposals received in the response to the Request for Proposal (RFP) for Fire and EMS Assessment Strategic Plan for Fire Rescue (Bid No. NC09-011) as being statistically inconsistent with the other reviews, and further recommends that said proposal be awarded to TriData with a caveat that should the County determine that it can procure through piggybacking a GSA contract at a lower dollar, amount, that would be the approach taken.

Discussion: Mr. Hallman reviewed the request. Discussion followed regarding concerns related to deleting the input from one of the three reviewers of the proposal.

Motion: Approve expansion item #2 as stated above.

Maker: Commissioner Leeper

Second: Commissioner Boatright

Action: Aye: Commissioners Leeper, Holloway, and Boatright.

Nay: Commissioner Boyle.

Absent: Commissioner Johnson.

Follow Up: Finance, OMB, County Manger Designee, County Attorney, Fire/Rescue

RS100609 - 10:32:55 Expansion Item #3: Approve the Easement Agreement and Deed of Conveyance between John Howell (Jack) Heard and the Board of County Commissioners of Nassau County, Florida, related to the conveyance of Lot M of the Nassau County 14<sup>th</sup> Street Annex Property and authorize the Chairman to sign both documents; and remittance of the sale price and the cost of recordation fees by the Grantee.

Motion: Approve expansion item #3 as stated above.

Maker: Commissioner Holloway

Second: Commissioner Leeper

Action: Aye: Commissioners Leeper, Boyle, Holloway, and Boatright.

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# PROPOSAL

## Fire and EMS Assessment and Strategic Plan for Nassau County, Florida

Submitted to:

Fire Chief Sam Young  
Nassau County Fire & Rescue  
96160 Nassau Place  
Yulee, FL 32097

Submitted by:

Patrick Simpson, Senior Program Manager  
TriData Division/System Planning Corporation  
1000 Wilson Boulevard, 30th Floor  
Arlington, VA 22209  
(703) 351-8300

March 25, 2010

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PROPRIETARY/CONFIDENTIAL INFORMATION

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March 25, 2010

Fire Chief Sam Young  
Nassau County Fire & Rescue  
96160 Nassau Place  
Yulee, FL 32097

Dear Chief Young:

TriData, a division of System Planning Corporation, is pleased to submit this proposal to perform a Fire and EMS Assessment and Strategic Plan for Nassau County. Documents that you will find enclosed include: statement of project understanding, preliminary work statement for each topic area, project timeline, and the proposed total cost.

Our previous experience for the state of Florida is very extensive and includes studies of fire departments and arson units throughout the state, including studies for:

- Broward County
- Jacksonville
- Orange County
- Daytona Beach
- Palm Beach County
- Miramar
- Volusia
- Deerfield Beach
- Indian Creek Village
- Surfside

Most recently we are working on a study for Bonita Springs/Estero/San Carlos Park to evaluate the departments and make recommendations for potential merger or consolidation as well as an EMS study in Key West. We also have evaluated fire and emergency services at the Navy's installations in Florida.

TriData has a national reputation as one of the premier fire department consulting firms in North America. We are known for the technical excellence and objectivity of our recommendations, and the innovation of our studies, and for tailoring our consulting to our clients' needs; we do not perform "cookie-cutter" studies.

We have a proven track record and our studies have resulted in reduced response times, improved ISO ratings, consolidations, and optimized allocation of staffing and leadership resources. TriData has proposed many innovations during our 28 years of providing public safety, management, and financial consulting services for local governments and the public sector.

Our proposed study team has much experience in assessing and reviewing similar-sized fire and EMS departments. They also know the practical end of the services being delivered by the agencies. The proposal team has worked on many studies together, including combination and volunteer services.

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If you need clarification on any of the information provided in our proposal, please contact Patrick Simpson, Senior Program Manager and proposed project manager for this effort. I can be reached at (703) 351-8300, or [plsimpson@sysplan.com](mailto:plsimpson@sysplan.com).

We look forward to the potential opportunity to work with you, and continue our many successful studies in Florida.

Sincerely,

Patrick Simpson  
Senior Program Manager  
TriData Corporation

## Table of Contents

<b>I. INTRODUCTION .....</b>	<b>1</b>
<b>II. QUALIFICATIONS .....</b>	<b>4</b>
<b>III. PROPOSED PROJECT STAFF .....</b>	<b>7</b>
Corporate Oversight.....	7
Project Manager .....	7
Key Team Members.....	8
<b>IV. WORK PLAN AND TIMELINE .....</b>	<b>10</b>
Scope of Work .....	10
Study Tasks.....	11
Timeline.....	18
<b>V. PAST EXPERIENCE.....</b>	<b>21</b>
<b>VI. REFERENCES.....</b>	<b>23</b>
<b>VII. COST PROPOSAL .....</b>	<b>24</b>

## I. INTRODUCTION

TriData is a division of System Planning Corporation (SPC), a corporation organized and existing under the laws of the State of Delaware. SPC was established in 1970 and TriData was later established in 1981 as a subsidiary of SPC, and is now wholly-owned by SPC's founder and CEO Dr. Ronald Easley. TriData has done business under this name since it began operating, and we celebrated our 28th anniversary in November 2009.

TriData specializes in research, analysis, and management studies in fire protection, emergency medical services, prevention and public safety, emergency management, and now homeland security.

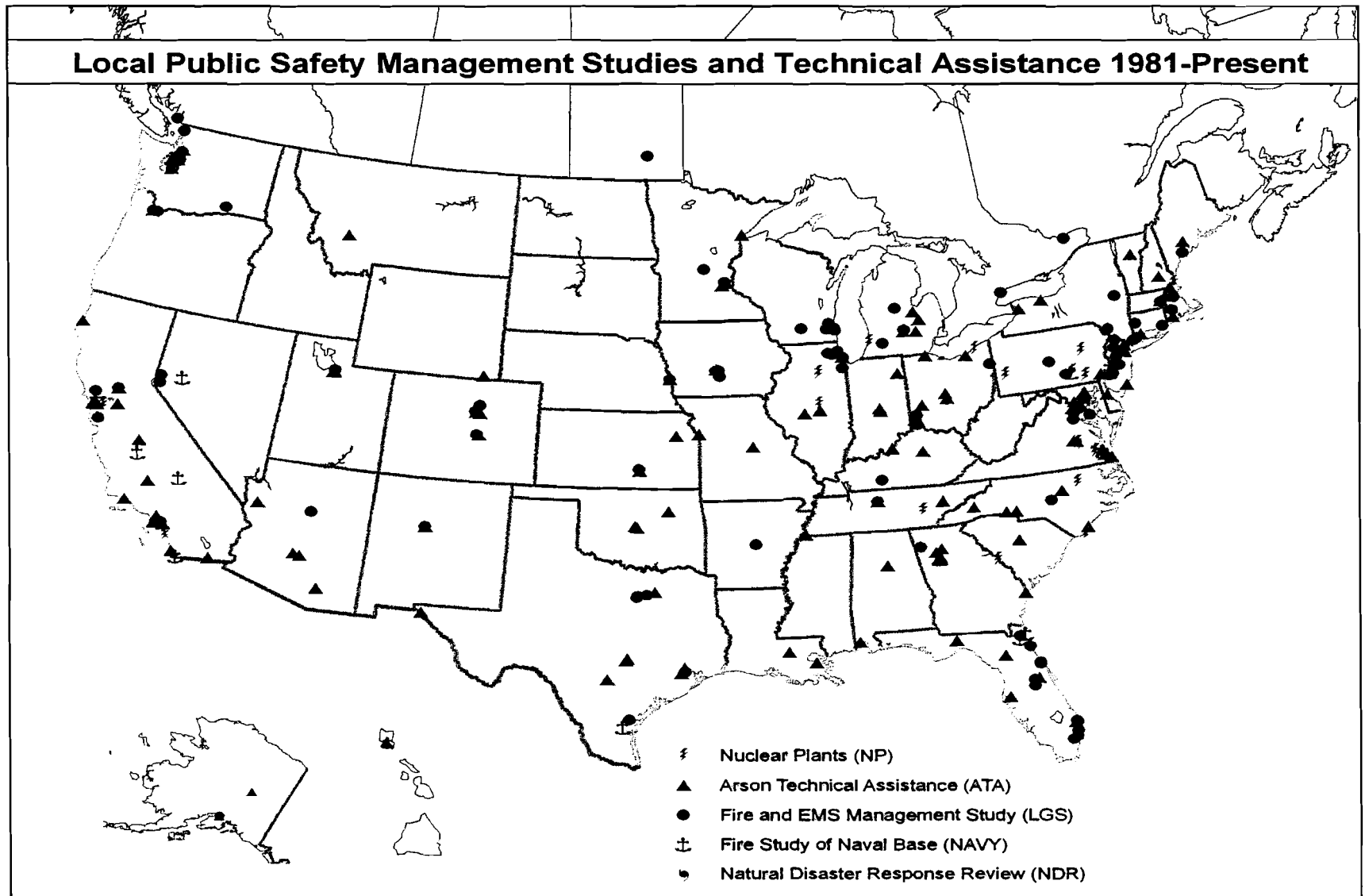
About half of TriData's work is fire department management studies for local governments. Most of the rest is fire and EMS research and evaluations for the federal government, including the U.S. Navy, U.S. Fire Administration, Federal Emergency Management Agency, U.S. Forest Service, Department of Justice, Department of Transportation, and Department of Interior. By performing a wide range of fire and EMS research studies, TriData brings in-depth state-of-the-art knowledge of virtually all aspects of fire and EMS management to each study; the state and local government studies in turn provide a practical basis for the research.

Our fire department and EMS management reviews and strategic plan reports have included examinations of management and organization, staffing, equipment, apparatus, facilities, station locations, fire prevention and public education, emergency dispatch and communications, budget and funding mechanisms, resource allocation and priorities, and emergency medical services.

TriData has undertaken more than 170 studies of fire departments for cities and counties ranging from 8,000 to 3 million in population. The majority of TriData's projects have had program and service performance analyses as a focus and our work have been conducted onsite at over 200 locations (including fire department management studies, arson unit investigation studies, and others) throughout the United States and Canada. The map on the following page depicts the span of locales where TriData has conducted studies of fire and law enforcement agencies of local departments and provided high level technical assistance.



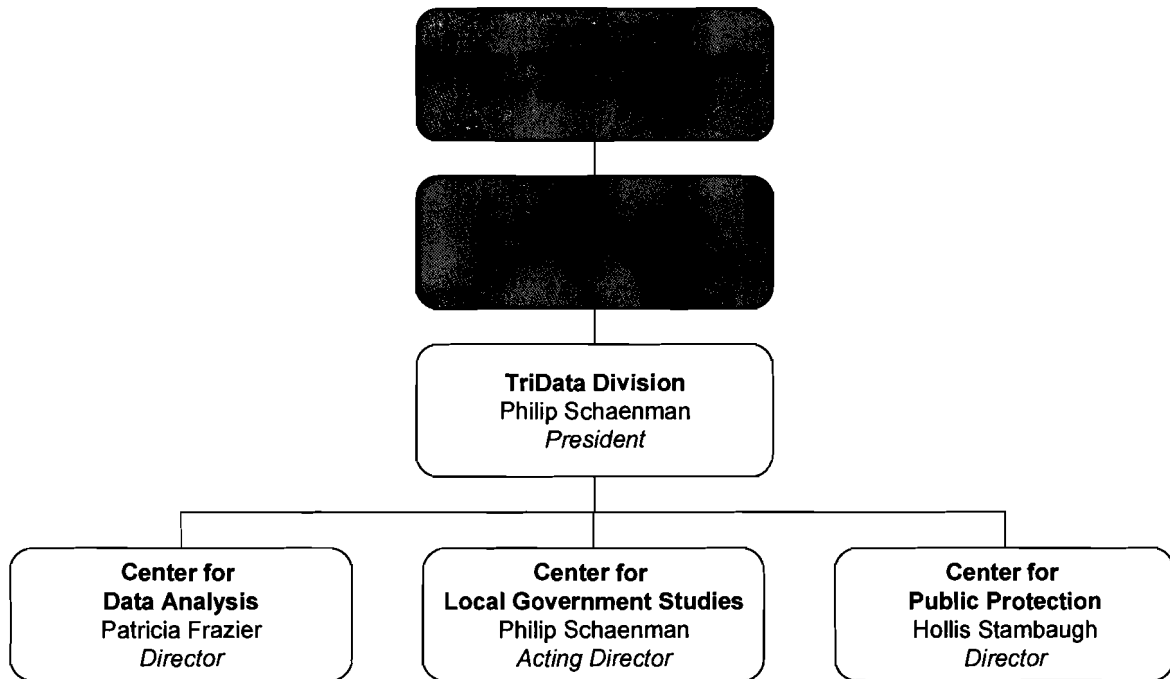
Figure 1: TriData Map



**Location of Offices** – TriData will provide work under this contract from our offices located at 3601 Wilson Boulevard, Arlington, VA 22201. TriData personnel can quickly access Nassau County by major area airports or by major highways.

**Organizational Structure** – System Planning Corporation is a 200-employee defense and national security contractor that specializes in high-level systems engineering and national security studies. TriData reports to SPC’s Senior Vice President for Technical Operations (see Figure 2). TriData has access to SPC’s technical staff, computer facilities, graphics and design department, project accounting systems, telecommunications, and other resources. TriData’s organization is shown below. This study would be undertaken by our Center for Local Government Studies.

**Figure 2: SPC, TriData Division Organizational Chart**



**Organizational Makeup** – TriData has a staff of 17 highly qualified employees and the services of 40 expert consultants across the nation. For this project we are proposing 3 full-time staff and 1 consultant. TriData always has leading experts on hand who are heavily involved on our projects. Our organizational approach reduces overhead dramatically and allows us to use high-caliber, nationally known experts on our projects. TriData’s staff includes current and former fire service officials, leaders in the public management field, fire data analysts, and technical and research specialists

## II. QUALIFICATIONS

The TriData division of System Planning Corporation is pleased to submit this draft proposal to Nassau County to perform a Fire and EMS Assessment and Strategic Plan study.

The study will include an analysis of management and organization, volunteer recruitment and retention, fire and EMS services, physical condition of stations, and analysis of response times. It will also consider the policies and procedures used by the departments, training, emergency preparedness, and special operations and provide a 10 year strategic plan with options.

TriData is one of the premier public safety consulting firms in North America. We specialize in research, analyses, and management studies in fire protection and emergency medical services; prevention and preparedness; and homeland security and emergency management. Our array of fire and emergency research extends across the United States, supporting federal, state, local governments, and the private sector.

We believe we are extremely well-qualified and offer a highly cost-effective team for this project. We completed exactly this type of work for tens of departments in the past few years, with high ratings, and have done so with a well known project team of experts. That experience ensures a rapid start-up of the project, high value, and top quality. TriData offers five essential elements of experience:

1. **A Long, Successful History Providing Relevant Similar Work** – TriData is known for its technical excellence, objectivity, and innovation of our fire service studies. We tailor our consulting to our clients' needs; we do not do cookie-cutter studies, or construct one size fits all solutions. TriData has provided more than 170 fire department studies for local municipalities.

TriData has worked with many local communities like Nassau County as well as state and federal agencies, to develop recommendations that improve public safety management and provide key components to develop a strategic plan.

2. **Much Experience in the State of Florida** – TriData' studies include Broward County, Daytona Beach, Jacksonville (2), Orange County, Deerfield Beach (2), Volusia, Miramar, and Indian Creek Village. Our current Bonita Springs/Estero/San Carlos Park study, for example, focuses on improving efficiency and assessing potentials for merger or consolidation of emergency services.
3. **An Experienced Research and Analytical Team** – Our team brings exceptionally strong expertise. The proposed project manager Patrick Simpson has

over 32 years of fire/EMS department experience, including 19 years as a Chief Executive Fire Officer. He has been a principal analyst for studies in Deerfield Beach, FL; Muskego, WI; Upper Providence, PA; Pike Township, IN; Roanoke, VA; Ocean City, NJ; Frederick County, MD, Rockbridge County, VA; Toledo, OH; and many others. Chief Simpson has much knowledge of fire ground operations, emergency medical services, hazardous materials, technical rescue, code enforcement, fire investigation, contract negotiations, personnel management, budgeting, and public relations.

All of the senior project personnel have been chief officers, firefighters, and EMTs; therefore, they know the practical end of the services being delivered by the fire and EMS departments in Nassau County. The proposed personnel have worked in career departments, combination departments, and were volunteers.

- 4. Reputation in the Fire World** – TriData has an outstanding reputation throughout the fire service and allied safety agencies. We are considered objective and technically excellent by city and county management, fire department management and staff, and volunteer leadership. We have given many presentations at metro fire chief, city management, and even the IAFF Redmond Symposium meetings on fire department management issues. This improves the acceptance and use of our findings by jurisdictional management, fire department leaders, firefighters, and citizens. Our key personnel have served in state and local government, know public safety operations, and have personally been involved in all levels of fire department operations. This background enables us to function extremely well with local officials and fire/rescue personnel during information gathering, interviewing, and other fact-finding activities on site. We are trusted.

TriData has 28 years experience in undertaking studies with the scope of work desired by Nassau County. Our local government studies have examined station locations, staffing and resource deployment; fleet configuration and apparatus; and forecasting of demand and population.

- 5. Experts in Data Analysis, Benchmark Comparisons, and Performance Metrics** – In the course of our studies, we have developed a database that can be used for comparisons of Nassau County with other fire and EMS departments. Our data provides insights on current trends affecting fire and EMS protection, including demand, costs, staffing, EMS delivery, and other factors. Plus, we have a good idea of how other departments function, best practice models of organization and management, and other examples of well run departments.

In addition, we have a unique perspective on best practice municipalities not only in the United States, but also internationally. We did a series of reports called International Concepts in Fire Protection to understand why so many foreign cities spend less money yet have better bottom-line results in fire protection and firefighter injuries.

Finally, TriData is expert in developing performance measures for fire and EMS departments. Our staff has written two books on measuring effectiveness and productivity in local fire departments, and co-authored the fire protection chapter in the International City Management Association's book, *How Effective Are Your Community's Services?* (latest edition 2006).

TriData is committed to improving the service delivery and management of fire and EMS departments, and we work hard for our clients to achieve the optimum solutions for their situation. TriData is well prepared to do an excellent job for Nassau County. We look forward to the potential opportunity to work with you.

### III. PROPOSED PROJECT STAFF

TriData has a superior group of professionals whose collective knowledge of and experience in public safety master planning and evaluation is unmatched. The proposed TriData team is extraordinarily well-qualified to perform a fire/rescue assessment and strategic plan development for Nassau County, FL. We offer a team of professionals experienced in the field of fire/rescue and ambulance services who have worked together on many studies. While individuals are assigned specific tasks, the end product is a team effort to get the best results. Resumes for each team member can be found in Appendix A.

#### Corporate Oversight

For each project, a senior executive is responsible for overseeing TriData's work in relation to our customer's needs and corporate mission. For SPC's TriData Division, corporate oversight is the responsibility of TriData's President, Philip Schaenman.

**Philip Schaenman, MIFireE**, is president and founder of TriData. He has more than 27 years experience leading similar comprehensive studies of fire organizations and 30 years related research in fire protection, EMS, hazmat, and emergency management. He is considered an expert in fire prevention and public education, and fire department analyses.

Mr. Schaenman is an internationally known expert in fire management data analysis, fire prevention research, performance measurement, and management of complex fire protection studies. Mr. Schaenman is also the principal researcher on TriData's studies of *International Concepts in Fire Protection* and *Global Concepts In Residential Fire Safety*. He has visited cities around the world to understand why U.S. cities have much higher fire incidence, fire fatality rates, and dollar losses than other cities, yet have much larger fire departments and expenditures per capita. Currently, he is leading studies in Australia and Japan for the U.S. Centers for Disease Control and Prevention. He is also the project manager for evaluation of the U.S. Navy Fire and Emergency Services firefighting capabilities.

Mr. Schaenman holds advanced engineering degrees from Stanford University and Columbia University. He has testified before Congress both while in and out of government, and has been frequently cited in the media.

#### Project Manager

The key to TriData's organizational approach is single-point responsibility and accountability. TriData project managers have the responsibility of planning, executing, and delivering all products and services requested in accordance with contract terms. As part of their management responsibilities, the project manager oversees all work ongoing

under the contract, provides input on every aspect of the project, and coordinates the various study areas. The project manager meets with team members on a regular (usually weekly) basis to discuss the technical, schedule, and cost status of work and related issues.

**Patrick Simpson**, a senior analyst for TriData, will serve as the project manager for this effort. He has over 32 years of fire department experience, including 19 years as a Chief Executive Fire Officer. His department in Dodge City, Kansas received the *International Award for Fires Services Excellence* from the IAFC. He has been a principal analyst for studies in Deerfield Beach, FL; Muskego, WI; Upper Providence, PA; Pike Township, IN; Roanoke, VA; Ocean City, NJ; Frederick County, MD; Rockbridge County, VA; Toledo, OH; and many others. Chief Simpson has much knowledge of fire ground operations, emergency medical services, hazardous materials, technical rescue, code enforcement, fire investigation, contract negotiations, personnel management, budgeting, and public relations.

Chief Simpson has a Master of Arts in Public Administration, with emphasis on Municipal Administration. In 1989, he graduated from the National Fire Academy's Executive Fire Officer Program. He has published many articles on the fire service, including information for the Learning Resources Center for high school students contemplating fire service careers. Chief Simpson has also taught fire science technology at a college level and chaired the Fire Science Department of Dodge City Community College for eight years.

## **Key Team Members**

These professionals are the backbone of TriData's success. Each team member brings expertise in various fields of fire, EMS, program evaluation, performance measurement, and other related skills. The proposed Nassau County project team members have specific expertise in management and organization, fire rescue finances, fire department staffing, performance evaluation, GIS and data management, and quantitative and qualitative analysis.

**Daryl Sensenig** is a senior consultant for TriData whose background encompasses over two decades of fire service leadership experience spanning broad areas of responsibility including emergency communications, emergency management, disaster response, administration and finance, hazardous materials, technical rescue, marine firefighting, and other specialty teams. His extensive experience in the training and education of both civilians and military personnel has encompassed assignments within the Department of Defense, Department of State, U.S. Customs and Border Protection, Federal Emergency Management Agency, State of Maryland, University of Maryland, and regional

hospitals and fire departments, as well as additional public and private sector organizations.

Chief Sensenig has a Master of Arts in Public Administration from Bowie State University. He holds an appointment within the U.S. Department of Homeland Security to the Disaster Mortuary Operational Response Team (DMORT), with a special assignment to the Weapons of Mass Destruction (WMD) unit, and has served during numerous mass casualty disaster response and recovery efforts, including United Flight #93 after 9-11 and Hurricane Katrina.

**Joseph Laun** is a research analyst with over a decade of experience in both volunteer and career fire departments. Currently a career firefighter in Fairfax County, Virginia, Mr. Laun is involved in the promotional process for apparatus operators, the Accident Review Board, and the Apparatus Purchasing Committee. He combines his experience with an analytical educational background to conduct and analyze research on all aspects of fire department organizational and operational considerations, specifically employing techniques enhanced through his Master of Business Administration degree to develop more efficient practices. Mr. Laun will lead the budget and fiscal management segments of the project and assist with the preparation of the draft report.

**Markus Weisner**, research/GIS analyst, has a unique combination of systems engineering and fire service experience. Mr. Weisner is currently a career firefighter-EMT with the Charlottesville, Virginia Fire Department where he is actively involved in developing the student firefighting program. Recipient of the prestigious Truman and Mitchell scholarships, Markus created the University of Virginia association of Student Firefighters, and has worked for the Dublin Fire Brigade in Dublin Ireland performing response time analysis and creating Standard Operating Guidelines for auditing patient care reports.

Mr. Weisner has a Bachelor of Science degree in Engineering Science from the University of Virginia and a postgraduate diploma in Fire Safety Practice from the University of Dublin.



## IV. WORK PLAN AND TIMELINE

TriData has been at the forefront of conducting fire and EMS studies for state, regional, and local fire departments across the United States and Canada. Our methodology is based on 27 years of working successfully with local governments across the nation.

Conducting a fire and EMS assessment and developing a strategic plan requires collecting and analyzing relevant data and involving stakeholders in the study process. TriData's success on past projects is a direct result of our experience in both areas. We are expert in making use of the best available data, and we have much experience working with stakeholder groups. The ultimate success of a fire and EMS assessment study often comes from the input and buy-in of stakeholders that occurs early in the project—not just at the end.

### Scope of Work

The Nassau County Commission has requested a proposal for professional fire and EMS assessment and strategic plan development service. This assessment will review the current level of fire and EMS services being offered as well as address future strategic needs.

The following items shall be addressed in the study tasks as presented in the following section, Study Tasks.

1. Analysis of citizen access to emergency services and recommendation for improvements.
2. Assessment of current level of services and identification of additional services to be provided (or those that could be reduced or altered).
3. Analysis of level, allocation and utilization of career and volunteer personnel recommending apparatus staffing level.
4. Review and recommend improvements, if necessary, to the organizational structure and make-up of the fire/rescue services.
5. Review, establish and/or recommend (if warranted) appropriate level of authority for Nassau County government.
6. An assessment of organizational structure of Fire/Rescue organizations.
7. Assessment of cost effectiveness of current operations and identification of areas where cost savings, cost avoidance and/or improved productivity and service can be accomplished.
8. Assessment of the current Capital Improvement Plan (CIP) along with a recommended needs based CIP vehicle program. This should include a

recommended vehicle replacement plan with a proposed timetable to address vehicle needs, mileage, age, expected county growth areas, etc.

9. Assessment of fire/rescue policies, procedures, operational practices and training programs to assure personnel safety.
10. Analysis of the operating principles, participation, role and staffing of committees and commissions. This should include leadership and staff support.
11. Analysis of physical facilities, apparatus and equipment in regards to Fire and EMS operations.
12. Analysis of personnel training, minimum levels of required training, as well as standardizing the level of training system-wide.
13. Analysis of current personnel information and training record retention system-wide.
14. Recommendation of future staffing and equipment needs for career and volunteer services.
15. Evaluation of present emergency on-scene communications support and future requirements.
16. Assessment of relationship and coordination with all governmental departments, volunteer organizations and external agencies.
17. Analysis of current CAD and GIS capabilities and provide recommendations for enhancement if necessary.
18. Evaluation of present public safety education programs and the development of public safety education programs for each department.
19. Review and/or recommend ordinances as they are related to Fire and EMS within Nassau County.
20. Review and provide recommendations as necessary on volunteer recruitment and retention program efforts.
21. Provide a timeline of the assessment process as well as an overall expected time to deliver the final report.
22. Present final report, findings, and recommendations to the Nassau County Commission and other designated stakeholders.

## **Study Tasks**

To organize the study logically, we grouped the 22 items listed above into specific tasks. This approach allows us to address each of the items in-depth while at the same time analyzing them in context with other similar areas the county wants addressed. This approach also permits us to be efficient.

Key staff members that will be responsible for each task are identified as is the task leader (bold italics).

<b>Task 1:</b>	<b>Kickoff Conference Call</b>
<b>Personnel:</b>	<b><i>Simpson and Laun</i></b>

Our approach begins with a kickoff meeting to confirm the project's objectives and goals, validate the program plan, finalize a timeline (including milestones and deliverable target dates), review the expectations to validate stakeholder understanding and concurrence, and review background information requirements. We will also plan the tight schedule of meetings for the site visit.

<b>Task 2:</b>	<b>Collect and Review Background Items</b>
<b>Personnel:</b>	<b>Team</b>

To the extent available, we would like to obtain a comprehensive set of data at the beginning of the study, in advance of our first "triage" trip. We understand that some of the data may not be available or may take more time to gather, and will be available later on.

As noted earlier, though we try to base our work on hard data to the extent possible, we also spend time soliciting qualitative information, suggestions, and perceptions from the various stakeholders.

A comprehensive list of the data we wish to obtain can be found below.

Data we need to obtain before we begin the first visit:

- Fire departments organization charts
- Map of fire stations (updated)
- Map of county and fire protection areas
- Personnel deployment (number of uniformed career, volunteer, and civilian personnel in each unit)
- Past annual reports
- Latest ISO rating reports, with deficiency analysis, if any
- Most recent budget with any attendant information
- Capital improvement and apparatus replacement program
- Fire, EMS, hazmat, rescue, and other emergency incident trend data for the past 5–10 years
- Response time profiles for fire and EMS calls, by geographic area and by fire unit. (Ideally, second-in response times as well as first in would be provided, though rarely available).

- Numbers of fires, deaths, injuries and dollar loss by type of occupancy and by cause
- Fire and EMS apparatus complement by station (age; manufacturer; type; last major refurbishment, if any), including front-line and reserve engines, ladders, and other units
- Mutual and automatic aid agreements among fire and EMS departments or other organizations
- Expected major capital improvements that would present new risks or affect existing risks or travel times
- General obligation bond commitments and promises
- Directives regarding direction of the study (from county)
- Fire and EMS rosters and training standards

More specific data that will be needed for the response times:

- CAD data, to include incident number, date, address, call type, time received, time dispatched, units dispatched, en route times, arrival times, clear times, whether call was transported to hospital or not.
- NFIRS data, to include call type, building type, whether building was sprinklered, fire origin, fire containment, fire loss, injuries/deaths, etc.

This serves as “homework” for our review before the first series of meetings with fire and EMS departments and County officials. Some of this data will be collected during the course of the study if not readily available at the start.

<b>Task 3:</b>	<b>On-Site Meetings and Triage of Issues</b>
<b>Personnel:</b>	<b>Simpson, Laun, and Sensenig</b>
<b>Item(s) from your list</b>	<b>1</b>
<b>Addressed:</b>	

After reviewing the background information provided, a four-day site visit, comprising a series of intensive meetings, will be held early in the project. During the visit, we will have a team meet with County Fire and Emergency Medical Services officials, including the fire and EMS chiefs, administrators, and other County stakeholders deemed appropriate to discuss information collected and ramifications of any proposed changes to current operations. We believe it is important to meet with as many stakeholders as possible at the beginning to clarify misconceptions, solicit input on major issues, open channels of communication and discuss the interviews we will want to conduct.

We will visit fire stations and hold informal discussions with some of the staff and officers. We will tour the service areas to better understand the geography, risks present,

and the road system. We also spend time with the County's finance department and budget analysts to better understand the composition of the budget and its constraints.

Following these initial meetings and field observations, we meet again at the end of this "triage visit" with the County's designated project contact to summarize and triage the issues to be considered in depth and to identify any that need less attention, and then reset priorities as necessary to make sure that the key issues will receive adequate attention within the study budget. The scope of work, how information will flow between our project team and the County's project contact, and how the overall project will proceed are also discussed.

Besides meeting in work groups, we will meet one-on-one with a sample of fire and EMS staff at different levels. Of importance during this study is the need to have flexible times to meet with volunteers, which we have done in the past and will do for this project.

<b>Task 4:</b>	<b>Review of Operations</b>
<b>Personnel:</b>	<b><i>Simpson and Sensenig</i></b>
<b>Item(s) from your list Addressed:</b>	<b>2, 12, 13, 15, and 18</b>

This step comprises an analysis of fire and EMS operations to determine the level of service provided by the existing departments. To be a comprehensive study of the individual departments a strong level of familiarity with the operations of the departments is necessary to recommend changes.

We will evaluate the line fire and EMS operations of the departments. We do this by observing operations, reviewing SOP's, and interviews with line personnel, company officers, and operations chiefs. We look for compliance with required procedures (e.g., "Two-In/Two-Out") and standard industry practices. We determine whether the department's own policies and SOPs are being followed and whether they make sense. We will evaluate personnel training, prevention, and records management.

We will observe the communications center to determine how efficient they are in handling calls, and how accurate and useful is the data they generate from the CAD system.

Our examination will continue by looking at the 1) staffing; 2) policies and protocols in place; and 3) the quality assurance issues.

<b>Task 5:</b>	<b>Risk and Demand Analysis</b>
<b>Personnel:</b>	<b><i>Weisner</i></b>
<b>Item(s) from Your list</b>	<b>17</b>

**Addressed:**

Based on the information gathered above, TriData will:

- Identify trends affecting fire and EMS protection in Nassau County, including population growth, demographics, and risk
- Analyze trends in the number and size of fire, EMS, and other incidents in the past 5–10 years.
- Analyze incident reports or dispatch data to identify the run frequency by area of the County and by fire department unit.
- Use statistical extrapolation and expert judgment in the factors of influence to develop an envelope of the trends to be expected, including projections of reasonable ranges of fires, EMS calls, and other incidents over the next 1–5 and 5–10 years

We will analyze the current demand and risks and look at what changes the departments can reasonably anticipate in demand for services and risks faced. We estimate demand two ways to form an envelope of projections. The high estimate projects the trend in demand per capita, multiplied by the projected population increase. The low estimate assumes that per capita demand will remain as its current level, and that demand will be proportional to population growth. We project trends by type of call. We will disaggregate demand estimates by area of the County, where possible. We will consider the types of high-hazard occupancies that exist but may not have had any serious incidents, and the hazards that are likely to be built in the near future. The results of this analysis are compared to the existing capabilities to determine unmet needs. The results of the work performed in this step will be used in the second part of the station location, apparatus, and staffing analysis.

<b>Task 6:</b>	<b>Station Location Analysis, Staffing, and Apparatus</b>
<b>Personnel:</b>	<b>Weisner and Laun</b>
<b>Item(s) from your list</b>	<b>3 and 14</b>
<b>Addressed:</b>	

Based on data provided by the county and our observations and analysis in the previous steps, we will consider whether to add new stations, relocate existing stations, or maintain the status quo. We will determine the ideal number of stations based on our assessment of needs and risks for the short and long term. That is, we will divide our recommendations into those addressing current service demands, and those addressing future service demands.

There must be consideration not only of the average response times for Nassau County overall, but also of the cumulative frequency distribution of response times (percentage of calls responded to in three minutes, four minutes, five minutes, etc.), and the response times by geographical area and type of call. For example, our study of the Upper Providence, PA fire services created an improved response area map (that was digitized). The new map addressed the problems of volunteer districts that did not provide for the best response times. It will also improve data collection and analyses.

We will analyze the current staffing. This will include volunteer staffing whether or not career personnel may be needed and where to supplement volunteers. The recommendations will partly be based on crew sizes and determine alternatives for safe crew sizes, organized by type of vehicles and function performed. We will consider the level of service that can be provided once a unit arrives, and the safety of emergency responders as well as the public. We will look at the staffing and resources for all emergency services (e.g., fire operations, emergency medical services, special operations, etc.). We will also assess the appropriateness of each type of apparatus used by the different stations as well as the total number of units in the system. We will then analyze the station and apparatus, apparatus types, and staffing based on anticipated future demand and risks.

<b>Task 7:</b>	<b>Organization and Management</b>
<b>Personnel:</b>	<b><i>Simpson, Laun, and Sensenig</i></b>
<b>Item(s) from your list Addressed:</b>	<b>4, 5, 6, 7, 8, 10, 16, 19, and 20</b>

There are many satisfactory ways to organize fire and EMS departments. No single organizational structure or system has proven optimum. Likewise, a variety of personal leadership styles have been found to work. What matters is whether in reality the organization performs effectively for Nassau County fire/rescue, not theoretically, and if not why not. By this time in the study, we have a good grasp of the situation and where management and coordination need to be improved.

We will look at the existing organization of the fire and EMS departments. We will examine the rank structure and the management staffing levels throughout the organization relative to the services delivered. We have a large comparison base of experience across many similar-sized departments. (We should note that general management principles and comparison with other types of agencies often do not translate well to fire and EMS departments; they are highly complex to manage because of the diversity and interrelation of the emergency services, and their effect on life safety).

In the process of this review, we consider the logic of the reporting mechanisms and organizational charts, internal communications, spans of control, training, management information, finance, and other aspects of the organization. The reviews of each department in the other components of this study will reveal a great deal about the adequacy of the organization and management structures. Therefore we make a first pass at reviewing the organization and management structure early in the study, but reserve judgment until the detailed examinations of the management of each function are completed.

***Volunteer Recruitment, Retention, and Structure*** – We will evaluate the current structures of each of the volunteer departments, including their similarities and differences; also the organization and the rank structures they use. We will also assess whether each department (individually and collectively) has difficulty recruiting new personnel, the roadblocks for recruitment, and whether or not new strategies for volunteer recognition should be considered.

<b>Task 8:</b>	<b>Assess Physical Condition of Stations and Fleet</b>
<b>Personnel:</b>	<b>Laun and Sensenig</b>
<b>Item(s) from your list Addressed:</b>	<b>7, 11, and 14</b>

***Stations*** – In addition to the evaluation on the appropriateness of station locations as it pertains to response times and meeting the needs of its citizens, we will review the functional capabilities of each fire station. This is not an architectural assessment, but a review of whether the physical structures of the stations are appropriate to operate from. That is, can it house the required number of personnel and apparatus; does it have the appropriate space for training or physical fitness? These will be some of the questions that will be asked and looked into.

***Fleet*** – We will assess the maintenance of vehicles and stations, looking at data and records on vehicle downtimes; viewing the condition of a sample of stations and vehicles first-hand; assessing firefighter and officer satisfaction with vehicles and stations through interview; and reviewing the age of the apparatus fleet and replacement plans.

We will explicitly address the types of apparatus needed throughout the County and whether the existing fleet is adequate going into the future. We consider National Fire Protection Association guidelines for apparatus.

<b>Task 9:</b>	<b>Prepare and Submit Draft Report</b>
<b>Personnel:</b>	<b>Team</b>
<b>Item(s) from your list Addressed:</b>	<b>1 and 21</b>



After all data is compiled and evaluations and analyses are completed, we will submit a draft report to the county's project manager for review and comment. We suggest that the draft be circulated to key personnel for review and comment. In addition to readers from the county, we generally suggest having personnel from the fire/rescue departments review the document for technical accuracy. Comments may include questions, corrections, or any additional information or data. The draft is submitted 30 days prior to the final report due date and we would ask that comments be returned to us within 15 days.

The draft report will include recommendations that address each specific study task in this proposal. The report will include a list of recommendations to be prioritized using a structured process.

<b>Task 10:</b>	<b>Prepare and Submit Final Report and Presentation</b>
<b>Personnel:</b>	<b>Team</b>
<b>Item(s) from Scope of Services Addressed:</b>	<b>22</b>

After receiving comments on the draft report, TriData will make final changes, perform a final edit, and officially submit the final report. We will submit up to 10 hard copies and 1 soft copy in PDF format, so that more copies can be produced by the county, if desired. At this time, we will also schedule a mutually agreeable date for the final presentation to the Nassau County Commission.

On-time delivery of the final report is dependent on our receiving the county's comments within 15 days of delivery of the draft report. If the county needs more than 15 days to submit comments, then the final report will be ready within 15 days of our receiving comments on the draft.

### **Timeline**

The tentative timeline for this study is shown on the following page. Based on TriData's experience with similar studies, we recommend a four-month timeline (starting from the date of a fully-executed contract), including two weeks at the end for the city to review the draft report, and two weeks for TriData to make the necessary revisions and submit the final report. We can deliver a draft report in three months, with the exact timing dependant on the availability of data and the length of review desired by the city for internal review, and the changes required.

Important assumptions for staying on schedule for this effort are that at least one calendar year of CAD data will be available in digital format in a timely manner, the review and comment period on the draft report will be coordinated by the county's project manager with the review comments sent to TriData in one consolidated document.



Figure 3: Tentative Project Timeline

TASKS	MONTH 1				MONTH 2				MONTH 3				MONTH 4				
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	
Task 1: Kickoff Conference Call	▲																
Task 2: Collect and Review Background Items																	
Task 3: On-Site Meetings and Triage of Issues																	
Task 4: Review of Operations																	
Task 5: Risk and Demand Analysis																	
Task 6: Station Location Analysis, Staffing, and Apparatus																	
Task 7: Organization and Management																	
Task 8: Assess Physical Condition of Stations and Fleet																	
Task 9: Prepare and Submit Draft Report																	
Task 10: Prepare and Submit Final Report and Presentation																	▲

Review of draft report by county

## V. PAST EXPERIENCE

The following studies are examples of projects undertaken by TriData in the last five years that are of similar scope and size to the study requested by Campbell County. They demonstrate the TriData team's outstanding credentials for performing all aspects of the RFP's statement of work.

***Rockbridge County, VA: Fire and EMS Study (2007)*** – This was an assessment of the 11 fire companies and 6 rescue squads that delivered emergency services in the county. TriData conducted a review of Rockbridge County and the cities of Lexington and Buena Vista fire/rescue and emergency service system to examine whether services were being delivered effectively and efficiently. The study included evaluation of each company's operations, management practices, training, fund raising, and special operations. Specific study areas included management and organization, facilities, staffing and response time, and fire prevention. Considered important in this study was the capacity of the volunteers to deliver the increased demand for EMS. A master plan implementation timeline was also developed. The final product was a five year detailed strategic plan, as well as triaged recommendations for improvement.

***Deerfield Beach, FL : Assessment of Fire-Rescue Management and Organization( 2006)***- The focus of the analysis was an evaluation of the efficiency and effectiveness of the Department's management and organization, service delivery, training, and fire prevention program. TriData also interviewed or met with the fire department chief and other leadership, the local battalion chiefs, and most members of the department on two of the three shifts. The study was conducted in an atmosphere of great tension and strained labor management relations. Despite the strained atmosphere, TriData received outstanding cooperation and candid comments from all concerned.

***Roanoke, VA: Fire and EMS Study (2006)*** – This study focused on redesigning fire and EMS deployment strategies. In particular the study emphasized the growing number of EMS responses and decreasing availability of volunteers. TriData designed a program where the city could ensure full EMS coverage while taking advantage of available volunteer services. Human resource issues were also studied and response times were formally evaluated using CAD data and Arc/GIS.

***Stafford County, VA: Comprehensive Fire and Rescue Service Assessment and Long Range Service Plan (2002)*** – TriData performed a comprehensive review and long-range service plan to determine if the fire/rescue system as a whole was meeting the needs of the population, performing efficiently and effectively, and prepared to meet future demand in

the county. Stafford's primary goal as it grew and expanded was to preserve the volunteer component of the system for as long as possible. In general, volunteers are highly cost-effective and have a long history of serving the community. Thus, one part of the strategy for the future was to improve volunteer retention and recruiting, to keep volunteerism as strong as possible for as long as possible. Another major recommendation for the future was to reorganize the Stafford County Fire and Rescue Service as an integrated, countywide fire-rescue department under the authority of a single fire-rescue chief with full command and administrative authority.

***Jacksonville, FL – Analysis of Population Growth & Demand, Fire Station***

***Locations, & the Fire Prevention Division (2001)-(2006)- (2009)*** TriData completed a comprehensive study of the department. Following this study, the population of Jacksonville grew substantially, outpacing the estimations made at every level of city planning. TriData performed a secondary analysis to examine current station locations and the improvement of response times based on new and projected population calculations and current and future development plans.

In 2006, TriData worked cooperatively with the city and the fire and rescue department to evaluate the above aspects of the department and made recommendations that would compliment the operations of one of the world's best all-hazard response departments.

In 2009, the city has been in touch with us to consider a third comprehensive study.

***Calvert County, MD: Fire-Rescue-EMS Comprehensive Master Plan (2000)*** – At the time of our study, Calvert County was served by 9 independent volunteer fire departments and rescue squads, and a county-wide advanced life support service. This study evaluated the current level of service and made recommendations on the organization and management of the county's fire-rescue-EMS services for the future. Included were the issues of volunteer retention and recruiting, the dispatch center, the phasing in of career staff, the role of the county, prevention, recruiting, apparatus, communications, ALS, fire operations, water supply, water safety, hazmat, and mutual aid.

## VI. REFERENCES

1. **Orange County, FL**  
James Fitzgerald, Deputy Chief  
Orange County Department of Fire and Rescue  
201 South Rosalind Avenue, 5th Floor  
Orlando, FL 32802-1383  
(407) 836-9000
  
2. **Deerfield Beach, FL**  
Ada Graham-Johnson, City Manager  
City of Deerfield Beach  
150 2nd NE Avenue  
Deerfield Beach, FL 33442  
(954) 480-4263
  
3. **Indian Creek Village, FL**  
Sam Kissinger, Village Manager  
Indian Creek Village  
9080 Bay Drive  
Indian Creek Village, FL 33154  
(305) 865-4121
  
4. **Jacksonville Fire Department**  
Lorin Mock, Director of Emergency Operations  
515 N. Julia Street  
Jacksonville, FL 32202  
(904) 598-5206

## VII. COST PROPOSAL

Our proposed price for this project is **\$40,000**, which includes labor, travel, and other direct charges necessary to conduct the study, produce a final written report, and present the results to whatever audience the county desires.

Payment structure and billing process will be negotiated during contract negotiations.

SPC Proposal # 2009-058  
 Nassau County, FL- Fire and EMS Assessment and Strategic Plan  
 Submitted: April 14, 2010  
 GSA MOBIS Contract # GS-10F-0350M

**LABOR**

**Task 1: Kickoff Conference Call**

Simpson, Patrick	Project Manager	Principal Analyst/Consultant	\$297.80	65.7%	\$102.29	2	\$204.58
Sensenig, Daryl	Consultant	Analyst/Consultant	\$211.57	75.3%	\$52.26	2	\$104.52
<b>Subtotal</b>						<b>4</b>	<b>\$309.10</b>

**Task 2: Collect and Review Background Items**

Simpson, Patrick	Project Manager	Principal Analyst/Consultant	\$297.80	65.7%	\$102.29	3	\$306.87
Laun, Joseph	Research Analyst	Senior Support Specialist	\$135.49	53.1%	\$63.58	3	\$190.74
Argabright, Maria	Project Support	Support Specialist	\$97.28	17.5%	\$80.28	4	\$321.12
<b>Subtotal</b>						<b>10</b>	<b>\$818.73</b>

**Task 3: On-Site Meetings and Triage of Issues**

Simpson, Patrick	Project Manager	Principal Analyst/Consultant	\$297.80	65.7%	\$102.29	24	\$2,454.96
Sensenig, Daryl	Consultant	Analyst/Consultant	\$211.57	75.3%	\$52.26	24	\$1,254.24
Laun, Joseph	Research Analyst	Senior Support Specialist	\$135.49	53.1%	\$63.58	24	\$1,525.92
<b>Subtotal</b>						<b>72</b>	<b>\$5,235.12</b>

**Task 4: Review of Operations**

Simpson, Patrick	Project Manager	Principal Analyst/Consultant	\$297.80	65.7%	\$102.29	40	\$4,091.60
Sensenig, Daryl	Consultant	Analyst/Consultant	\$211.57	75.3%	\$52.26	20	\$1,045.20
<b>Subtotal</b>						<b>60</b>	<b>\$5,136.80</b>

**Task 5: Risk and Demand Analysis**

Weisner, Markus	Senior Analyst	Senior Support Specialist	\$135.49	53.1%	\$63.50	40	\$2,540.00
<b>Subtotal</b>						<b>40</b>	<b>\$2,540.00</b>

**Task 6: Station Location Analysis, Staffing, and Apparatus**

Laun, Joseph	Research Analyst	Senior Support Specialist	\$135.49	53.1%	\$63.58	32	\$2,034.56
Weisner, Markus	Senior Analyst	Senior Support Specialist	\$135.49	53.1%	\$63.50	24	\$1,524.00
<b>Subtotal</b>						<b>56</b>	<b>\$3,558.56</b>

**Task 7: Review of Organization and Management**

Simpson, Patrick	Project Manager	Principal Analyst/Consultant	\$297.80	65.7%	\$102.29	10	\$1,022.90
Sensenig, Daryl	Consultant	Analyst/Consultant	\$211.57	75.3%	\$52.26	40	\$2,090.40
Laun, Joseph	Research Analyst	Senior Support Specialist	\$135.49	53.1%	\$63.58	12	\$762.96
<b>Subtotal</b>						<b>62</b>	<b>\$3,876.26</b>

**Task 8: Assess Physical Condition of Stations and Fleet**

Sensenig, Daryl	Consultant	Analyst/Consultant	\$211.57	75.3%	\$52.26	20	\$1,045.20
Laun, Joseph	Research Analyst	Senior Support Specialist	\$135.49	53.1%	\$63.58	20	\$1,271.60
<b>Subtotal</b>						<b>40</b>	<b>\$2,316.80</b>



**Task 9: Prepare and Submit Draft Report**

Personnel	Position	Rate	Hours	Rate	Hours	Rate	Hours	Total
Schaenman, Philip	Corporate Oversight	Executive Director	\$402.44	47.1%	\$212.85	6		\$1,277.10
Simpson, Patrick	Project Manager	Principal Analyst/Consultant	\$297.80	65.7%	\$102.29	40		\$4,091.60
Laun, Joseph	Research Analyst	Senior Support Specialist	\$135.49	53.1%	\$63.58	12		\$762.96
Argabright, Maria	Project Support	Support Specialist	\$97.28	17.5%	\$80.28	8		\$642.24
<b>Subtotal</b>							<b>66</b>	<b>\$6,773.90</b>

**Task 10: Prepare and Submit Final Report and Presentation**

Simpson, Patrick	Project Manager	Principal Analyst/Consultant	\$297.80	65.7%	\$102.29	30		\$3,068.70
Laun, Joseph	Research Analyst	Senior Support Specialist	\$135.49	53.1%	\$63.58	8		\$508.64
Argabright, Maria	Project Support	Support Specialist	\$97.28	17.5%	\$80.28	8		\$642.24
<b>Subtotal</b>							<b>46</b>	<b>\$4,219.58</b>

<b>Total Labor</b>	<b>456</b>	<b>\$34,784.85</b>
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**TRAVEL**

SPC/consultant travel (airfare, hotel, meals, car rental, miscellaneous)		\$4,504
<b>Total Travel</b>		<b>\$4,504</b>

**OTHER DIRECT COSTS**

Copying, reproduction, shipping, miscellaneous		\$711
<b>Total Other Direct Costs</b>		<b>\$711</b>

<b>Total Cost</b>		<b>\$40,000</b>
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# Contractor Information

(Vendors) How to change your company information

Contract #: **GS-10F-0350M** Socio-Economic : Other than small business  
 EPLS : Contractor not found on the Excluded Parties List System  
 Contractor: **SYSTEM PLANNING CORPORATION**  
 Address: **3601 WILSON BLVD ARLINGTON, VA 22201-2362**  
 Govt. Contracting Officer: **SUZAN PASCHALL**  
 Phone: **(703)351-8368** Phone: 253-931-7890  
 E-Mail: **kwheelles@sysplan.com** E-Mail: [suzan.paschall@gsa.gov](mailto:suzan.paschall@gsa.gov)  
 Web Address: <http://www.sysplan.com>

Source	Title	Contract Number	Contract Terms & Conditions	Contract End Date	Category	View Items Available
874	MISSION ORIENTED BUSINESS INTEGRATED SERVICES (MOBIS)	GS-10F-0350M		Jun 30, 2012	874 1	<b>DISAST RECOV</b> <b>ARRA</b>
					874 2	<b>DISAST RECOV</b> <b>ARRA</b>
					874 3	<b>DISAST RECOV</b> <b>ARRA</b>
					874 7	<b>DISAST RECOV</b> <b>ARRA</b>

Additional Contracts held by this contractor. To view more details of a contract, click the Contract Number below.

Source	Title	Contract Number	Contract Terms & Conditions	Contract End Date	Category	View Items Available
70	GENERAL PURPOSE COMMERCIAL INFORMATION TECHNOLOGY EQUIPMENT, SOFTWARE, AND SERVICES	GS-35F-0320W		Mar 14, 2015	132 51	<b>COOP PURCH</b> <b>DISAST RECOV</b> <b>ARRA</b>
871	PROFESSIONAL ENGINEERING SERVICES	GS-23F-0132L		Mar 6, 2011	871 1	<b>DISAST RECOV</b> <b>ARRA</b>
					871 2	<b>DISAST RECOV</b> <b>ARRA</b>
					871 3	<b>DISAST RECOV</b> <b>ARRA</b>
					871 4	<b>DISAST RECOV</b> <b>ARRA</b>
					871 5	<b>DISAST RECOV</b> <b>ARRA</b>
					871 6	<b>DISAST RECOV</b> <b>ARRA</b>



## **Federal Supply Schedule**

**Authorized Federal Supply Schedule Price List No.: GS-10F-0350M**

*Federal Supply Group: 874*

*Class: R499*

### **MISSION, ORIENTED BUSINESS INTEGRATED SERVICES (MOBIS)**

- Special Item No. 874-1 Consulting Services**
- Special Item No. 874-1RC Recovery Purchasing**
- Special Item No. 874-2 Facilitation Services**
- Special Item No. 874-2RC Recovery Purchasing**
- Special Item No. 874-3 Survey Services**
- Special Item No. 874-3RC Recovery Purchasing**
- Special Item No. 874-7 Program Integration and Project Management Services**
- Special Item No. 874-7RC Recovery Purchasing**

**SYSTEM PLANNING CORPORATION**  
1000 Wilson Boulevard  
Arlington, Virginia 22209  
703 351-8200 – Main Number  
703 351-8254 – Contract Management  
703 351-8410 – Fax  
Internet: [www.sysplan.com](http://www.sysplan.com)

**Business Size: Large under NAICS 541611**

**Base Contract Period**  
**July 1, 2002 through June 30, 2007**  
**Plus Three 5-Year Options**

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

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

**PRICES SHOWN HEREIN ARE NET (DISCOUNT DEDUCTED)**

**TABLE OF CONTENTS**

CUSTOMER INFORMATION..... 2  
CONTRACT OVERVIEW ..... 4  
CONTRACT USE ..... 4  
SPECIAL ITEM NUMBERS (SINs) – CONTRACT SCOPE..... 4  
    SIN 874-1: CONSULTING SERVICES..... 5  
    SIN 874-2RC: RECOVERY PURCHASING ..... 5  
    SIN 874-2: FACILITATION SERVICES ..... 5  
    SIN 874-2RC: RECOVERY PURCHASING ..... 5  
    SIN 874-3: SURVEY SERVICES..... 5  
    SIN 874-3RC: RECOVERY PURCHASING ..... 6  
    SIN 874-7: PROGRAM INTEGRATION AND PROJECT MANAGEMENT SERVICES ..... 6  
    SIN 874-7RC: RECOVERY PURCHASING ..... 6  
4.0 DEGREE AND EXPERIENCE SUBSTITUTION TERMS ..... 6  
LABOR CATEGORY DESCRIPTIONS AND QUALIFICATIONS ..... 7  
SUMMARY OF PRICES ..... 8  
7.0 ORDERING METHODS AND LIMITATIONS ..... 9  
8.0 BLANKET PURCHASE AGREEMENTS ..... 9

**CUSTOMER INFORMATION****1a. Awarded Special Item Numbers (SINs)**

874-1 Consulting Services

874-1RC Recovery Purchasing

874-2 Facilitation Services

874-2RC Recovery Purchasing

874-3 Survey Services

874-3RC Recovery Purchasing

874-7 Program Integration and Project Management Services

874-7RC Recovery Purchasing

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

**1c. If the Contractor is proposing hourly rates a description of all corresponding job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform service shall be provided. If hourly rates are not applicable, indicate "Not applicable" for this item. All descriptions can be found on pages 9-10.**

**2. Maximum Order: \$1,000,000.00 – Further discussion in Section 7.0**

**3. Minimum order: \$300.00– Further discussion in Section 7.0**

**4. Geographic coverage (delivery area): Domestic Only**

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

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

**7. Quantity discounts: None Offered**

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

**9a. Notification that Government purchase cards are accepted at or below the micro-purchase threshold: Yes**

- 9.b Notification whether Government purchase cards are accepted or not accepted above the micropurchase threshold: Accept over \$2,500.**
- 10. Foreign items (list items by country of origin): None**
- 11a. Time of Delivery (Contractor insert number of days): Specified on the Task Order.**
- 11b. Expedited Delivery. The Contractor will insert the sentence "Items available for expedited delivery are noted in this price list." under this heading. The Contractor may use a symbol of its choosing to highlight items in its price list that have expedited delivery: Contact Contractor.**
- 11c. Overnight and 2-day Delivery . The Contractor will indicated whether overnight and 2-day delivery are available. Also, the Contractor will indicated that the schedule customer may contact the Contractor for rates for overnight and 2-day delivery: Contact Contractor.**
- 11d. Urgent Requirements. The Contractor will note in its price list the "Urgent Requirements" clause of its contract and advise agencies that they can also contact the Contractor's representative to effect a faster delivery: Contact Contractor.**
- 12. F.O.B. Point(s): Destination**
- 13a. Ordering address(es): Same as company address.**
- 13b. Ordering procedures: For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA's), and a sample BPA can be found at the GSA/FSS Shedule homepage ([fss.gsa.gov/schedules](http://fss.gsa.gov/schedules)).**
- 14. Payment address(es): Same as company address.**
- 15. Warranty provision: Contractor's standard commercial warranty.**
- 16. Export Packing Charges (if applicable): N/A**
- 17. Terms and conditions of Government purchase card acceptance (any thresholds above the micropurchase level): Contact Contractor**
- 18. Terms and conditions of rental, maintenance, and repair (if applicable): N/A**
- 19. Terms and conditions of installation (if applicable): N/A**
- 20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable): N/A**
- 20a. Terms and conditions for any other services (if applicable): N/A**
- 21. List of service and distribution Points (if applicable): N/A**
- 22. List of participating dealers (if applicable): N/A**

23. Preventive maintenance (if applicable): N/A
- 24a. Special attributes such as environmental attributes, (e.g., recycled content, energy efficiency, and/or reduced pollutants): N/A
- 24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g contractor's website or other location.) The EIT standards can be found at: [www.Section508.gov/](http://www.Section508.gov/).
25. Data Universal Numbering System (DUNS) number: 06-201-9765
26. Notification regarding registration in Central Contractor Registration (CCR) database:  
Registered

**Contractor will accept LH and FFP**

Government Awarded Prices (Net Prices)

**CONTRACT OVERVIEW**

SPC has been awarded a GSA Federal Supply Schedule contract for Mission, Oriented Business Integrated Services (MOBIS), Contract No. GS-10F-0350M. The contract period is from July 1, 2002 through June 30, 2007. Three five-year option periods may be exercised by GSA. Firm-fixed price, time and material, labor hour and level-of-effort task orders are acceptable under this contract.

**CONTRACT USE**

This contract is available for use by all federal government agencies as a source for MOBIS Services for domestic delivery only. The organizations listed below may place orders under this contract. Questions regarding organizations authorized to use this schedule should be directed to the Contracting Officer.

- (1) Executive agencies.
- (2) Other Federal Agencies.
- (3) Mixed-ownership Government corporations.
- (4) The District of Columbia.
- (5) Government Contractors authorized in writing by a Federal agency pursuant to 48 CFR 51.1.
- (6) Other activities and organizations authorized by statute or regulation to use GSA as a source of supply.

**SPECIAL ITEM NUMBERS (SINs) – CONTRACT SCOPE**



SPC was awarded four (4) of the nine (9) available SINs that comprise Mission, Oriented Business Integrated Services. When any of the below services are ordered, Other Direct Costs (ODCs) that are applicable should be included in the resultant Task Order. Descriptions of the below labor categories are provided in Section 5.0.

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

Services include but are not limited to:

- strategic, business and action planning
- systems alignment
- cycle time
- high performance work
- leadership systems
- performance measures and indicators
- process and productivity improvement
- organizational assessments
- program audits, and evaluations

#### **SIN 874-2RC: RECOVERY PURCHASING**

This GSA Schedule SIN provides for state and local governments to use GSA Schedules for disaster recovery as provided for in Section 833 of the National Defense Authorization Act for Fiscal Year 2007, commonly known as the John Warner National Defense Authorization Act (P.L. 109-364). Specifically, it authorizes the use of Federal Supply Schedules by state and local governments to facilitate recovery from major disasters, terrorism, nuclear, biological, chemical, or radiological attacks. The disaster must be declared by the President under the Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. 5121 et. seq.).

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

Services include but are not limited to:

- the use of problem solving techniques
- resolving disputes, disagreements, and divergent views
- providing a draft for the permanent record
- defining and refining the agenda
- logistical meeting/conference support when performing technical facilitation
- recording discussion content and focusing decision-making
- debriefing and overall meeting planning
- convening and leading large and small group briefings and discussions
- preparing draft and final reports for dissemination

#### **SIN 874-2RC: RECOVERY PURCHASING**

This GSA Schedule SIN provides for state and local governments to use GSA Schedules for disaster recovery as provided for in Section 833 of the National Defense Authorization Act for Fiscal Year 2007, commonly known as the John Warner National Defense Authorization Act (P.L. 109-364). Specifically, it authorizes the use of Federal Supply Schedules by state and local governments to facilitate recovery from major disasters, terrorism, nuclear, biological, chemical, or radiological attacks. The disaster must be declared by the President under the Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. 5121 et. seq.).

#### **SIN 874-3: SURVEY SERVICES**

Services include but are not limited to:

- planning survey design
- defining and refining the agenda
- sampling; survey development
- survey database administration
- pretest/pilot surveying
- assessing reliability and validity of data

- determining proper survey data collection methodology
- administering surveys using various types of data collection methods
- analyses of quantitative and qualitative survey data

Production of reports to include, but 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 874-3RC: RECOVERY PURCHASING**

This GSA Schedule SIN provides for state and local governments to use GSA Schedules for disaster recovery as provided for in Section 833 of the National Defense Authorization Act for Fiscal Year 2007, commonly known as the John Warner National Defense Authorization Act (P.L. 109-364). Specifically, it authorizes the use of Federal Supply Schedules by state and local governments to facilitate recovery from major disasters, terrorism, nuclear, biological, chemical, or radiological attacks. The disaster must be declared by the President under the Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. 5121 et. seq.).

**SIN 874-7: PROGRAM INTEGRATION AND PROJECT MANAGEMENT SERVICES**

Services include but are not limited to:

- program management
- program oversight
- project management
- program integration (team leader)

**SIN 874-7RC: RECOVERY PURCHASING**

This GSA Schedule SIN provides for state and local governments to use GSA Schedules for disaster recovery as provided for in Section 833 of the National Defense Authorization Act for Fiscal Year 2007, commonly known as the John Warner National Defense Authorization Act (P.L. 109-364). Specifically, it authorizes the use of Federal Supply Schedules by state and local governments to facilitate recovery from major disasters, terrorism, nuclear, biological, chemical, or radiological attacks. The disaster must be declared by the President under the Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. 5121 et. seq.).

**4.0 DEGREE AND EXPERIENCE SUBSTITUTION TERMS**

SPC recognizes that successful performance depends on having personnel with the right skills and experience. These skills and experience are acquired through a proper mix of education and professional experience. We have found that skills required to support advanced technology efforts, today's problems and tomorrow's challenges, are not always supported by the traditional combination of formal education and work experience. Therefore, we have incorporated substitution allowances between equivalent education and experience in order to provide the quality of services required by the customer at the most reasonable price. The following tables present substitution equivalencies for education and experience requirements.

- **Substitutions for Educational Requirements**

Additional years of related experience may be substituted for degree requirements.

Degree Requirement	Equivalent Experience Substitution
High School	GED
Associate	High School plus two years additional related experience
Bachelor's	High school plus four years additional related experience or Associate's degree plus two years additional related experience
Master's	Bachelor's degree plus two years additional related experience or six years additional related experience
Doctorate	Bachelor's degree plus four years or Master's degree plus two years or eight years additional related experience

- **Substitutions for Work Experience Requirements.**

A related degree may be substituted for years of related work experience.

Degree	Equivalent Years of Experience
Bachelor's	Two
Master's	Four
Doctorate	Six

**LABOR CATEGORY DESCRIPTIONS AND QUALIFICATIONS**

The following SPC labor categories are offered under the MOBIS contract:

1. Executive Manager
2. Principal Analyst/Consultant
3. Analyst/Consultant
4. Sr Support Specialist
5. Support Specialist

**1. Executive Manager**

**Duties:**

Provides executive level management and oversees business operations, program planning, and marketing activities at a company-wide level. Examples of this category are corporate officers and administrators.

**Education and Experience Requirements:**

Bachelor's Degree or Masters Degree with usually twenty (20) or more years of experience.

**2. Principal Analyst/Consultant**

**Duties:**

Acts as principal lead on analytical, consulting, or assessment processes in support of technical, business & administrative goals of the program. Often performs analysis requiring advanced training and degrees. Types of personnel that are included in this category are senior managers that lead operation or support departments or programs and very senior level technical and operations staff.

**Education and Experience Requirements:**

Bachelor's Degree and/or Master's Degree or Equivalent with usually fifteen (15) or more years of experience.

**3. Analyst/Consultant**

**Duties:**

Provides analysis, assessment, technical or business area expertise. May provide supervisory direction. Examples of this category are senior analysts, engineers and scientists; department and program managers.

**Education and Experience Requirements:**

Bachelor's Degree or Equivalent with usually ten (10) years or more of experience.

**4. Senior Support Specialist**

**Duties:**

Provides lead or senior level support for technical, business & administrative aspects of the program. Examples of this category are contract administrators, financial analysts, senior program assistants and senior technicians.

**Education and Experience Requirements:**

Bachelor's Degree or Equivalent with usually (5) years or more of experience

**5. Support Specialist**

**Duties:**

Supports technical, business & administrative aspects of the program. Examples of this category are junior program assistants, technicians, and entry-level analysts or administrators.

**Education and Experience Requirements:**

GED with zero (0) to usually no more than five (5) years of experience

**SUMMARY OF PRICES**

A summarization of labor category prices for all awarded SINs under this GSA MOBIS Schedule Contract is listed below:

Effective July 1, 2007, the following GSA hourly/daily rates are hereby incorporated into contract # GS-10F-0350M. These rates are applicable to SINs 874-1, 1RC, 2, 2RC, 3, 3RC, and 7, 7RC:

**Years 6-10**

MOBIS Category	7/1/07 - 12/31/07 Year 6	1/1/08 - 12/31/08 Year 7	1/1/09 - 12/31/09 Year 8	1/1/10 - 12/31/10 Year 9	1/1/11 - 12/31/11 Year 10
Executive Manager	\$357.77	\$372.08	\$386.96	\$402.44	\$418.54
Principal					
Analyst/Consultant	\$264.74	\$275.33	\$286.35	\$297.80	\$309.71
Analyst/Consultant	\$188.08	\$195.61	\$203.43	\$211.57	\$220.03
Sr Support Specialist	\$120.45	\$125.27	\$130.28	\$135.49	\$140.91
Support Specialist	\$86.48	\$89.94	\$93.54	\$97.28	\$101.17

MOBIS Category	7/1/07 - 12/31/07 Year 6	1/1/08 - 12/31/08 Year 7	1/1/09 - 12/31/09 Year 8	1/1/10 - 12/31/10 Year 9	1/1/11 - 12/31/11 Year 10
Executive Manager	\$2,862.13	\$2,976.61	\$3,095.68	\$3,219.50	\$3,348.28
Principal					
Analyst/Consultant	\$2,117.94	\$2,202.66	\$2,290.76	\$2,382.40	\$2,477.69
Analyst/Consultant	\$1,504.68	\$1,564.86	\$1,627.46	\$1,692.56	\$1,760.26
Sr Support Specialist	\$963.63	\$1,002.17	\$1,042.26	\$1,083.95	\$1,127.31
Support Specialist	\$691.85	\$719.52	\$748.30	\$778.23	\$809.36

The contractor must update their GSA Advantage file to reflect the changes incorporated in this modification.

All other terms and conditions remain unchanged.

**7.0 ORDERING METHODS AND LIMITATIONS**

In accordance with the Placement of Orders clause of this solicitation, SPC will receive orders placed by GSA Federal Supply Service (FSS) by facsimile transmission. All paper form orders should be mailed to:

System Planning Corporation (SPC)  
 1000 Wilson Blvd., Suite 30  
 Arlington, VA 22209-2211

Minimum Orders – When the customer requires services covered by this contract in an amount below \$300, the customer is not obligated to purchase, nor is SPC obligated to furnish those services. However, SPC may accept smaller orders by specifying a smaller amount in proposal offers and subsequently revise the minimum order limitation to the applicable amount. In all cases, SPC can decline such orders by returning the order to the procuring office within five (5) workdays after receipt.

Maximum Orders – SPC will honor any order exceeding the \$1,000,000 maximum amount unless the order is returned to the procuring office within five (5) workdays after receipt, with a written notice stating the reasons for not supplying the service requested.

**8.0 BLANKET PURCHASE AGREEMENTS**

The establishment of Federal Supply Schedule Blanket Purchase Agreements (BPAs) for recurring services, is permitted when the procedures outlined herein are followed. All BPAs for

services must define the services that may be ordered under the BPA, along with delivery or performance time frames, billing procedures, etc. The potential volume of orders under BPAs, regardless of the size of individual orders, may offer the ordering office the opportunity to secure volume discounts. When establishing BPAs ordering offices shall inform contractors in the request for quotes (based on the agency's requirement) if a single BPA or multiple BPAs will be established, and indicate the basis that will be used for selecting the contractors to be awarded the BPAs.

Single BPA: Generally, a single BPA should be established when the ordering office can define the tasks to be ordered under the BPA and establish a firm-fixed price or ceiling price for individual tasks or services to be ordered. When this occurs, authorized users may place the order directly under the established BPA when the need for service arises. The schedule contractor that represents the best value and results in the lowest overall cost alternative to meet the agency's needs should be awarded the BPA.

Multiple BPAs: When the ordering office determines multiple BPAs are needed to meet its requirements, the ordering office should determine which contractors can meet any technical qualifications before establishing the BPAs. When multiple BPAs are established, the authorized users must provide the request to three (3) contractors if the proposed order is estimated to exceed the micro-purchase threshold, but not exceed the maximum order threshold. For orders exceeding the maximum order threshold, the request should be provided to any additional contractors that offer services that will meet customer needs. Ordering offices should strive to minimize the contractor's costs associated with responding to requests for quotes for specific services. The order should also be placed with the Schedule contractor that represents the best value and results in the lowest overall cost alternative to meet the agency's needs.