



**GENERAL SERVICES ADMINISTRATION**  
Federal Acquisition Service  
**Authorized Federal Supply Schedule FSS Price List**

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

**Schedule Title: Multiple Award Schedule**  
**Federal Supply Group: Information Technology Services, Professional Services, Facilities**

**Contract Number: GS-00F-336CA**  
**Contract Period: September 24, 2015 – September 23, 2025**  
Effective as of **Mod #PA-0030** dated **09-21-2023**.

For more information on ordering go to the following website: <https://www.gsa.gov/schedules>

**Contractor:** RSM US LLP  
1250 H Street, NW, Suite 700  
Washington, DC 20005

**Business Size:** Other than Small Business

**Telephone:** 717-209-2391

**FAX Number:** 410-246-9302

**Web Site:** <http://www.rsmus.com>

**E-mail:** [jennifer.mtcastle@rsmus.com](mailto:jennifer.mtcastle@rsmus.com)

**Contract Administration:** Jennifer Mt Castle, Manager

**CUSTOMER INFORMATION:**

**1a. Table of Awarded Special Item Number(s) with appropriate cross-reference to page numbers:**

SIN	Recovery SIN	SIN Description
522310	522310RC	Financial Advising, Loan Servicing and Asset Management Services
531210	531210RC	Financial Asset Resolution Services
54151HACS	54151HACSRC	Highly Adaptive Cybersecurity Services
54151S	54151SRC	Information Technology Professional Services
541611	541611RC	Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services
541690E	541690ERC	Energy Services
541990RISK	541990RISKRC	Risk Assessment and Mitigation Services
OLM	OLMRC	Order Level Materials

**1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract.** See Pricing Page 5.

**1c. If the Contractor is proposing hourly rates a description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform services shall be provided. If hourly rates are not applicable, indicate "Not applicable" for this item.** See Labor Category Descriptions Page 6.

**2. Maximum Order:** SINs 522310, 531210, 541611, 541690E, and 541990RISK - \$1,000,000  
SINs 54151HACS and 54151S - \$500,000  
SIN OLM - \$250,000

**3. Minimum Order:** \$100.00

**4. Geographic Coverage:** Domestic

**5. Point of Production:** If in the performance of any order under this contract, RSM US LLP uses one or more facilities located at a different address than in this price list, the place of performance is as specified in the individual order.

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

**7. Quantity discounts:** 3% or more if an order is greater than \$1,000,000 with further discounting based on the size, scope, and complexity of the potential task order.

**8. Prompt payment terms:** 2% discount – 10 days; 1% discount – 15 days. Otherwise, Net 30 calendar days. Information for Ordering Offices: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.

**9. Foreign items:** None

**10a. Time of Delivery:** Specified on the Task Order

**10b. Expedited Delivery:** Contact Contractor

**10c. Overnight and 2-day delivery:** Contact Contractor

**10d. Urgent Requirements:** Contact Contractor

**11. F.O.B Point:** Destination

**12a. Ordering Address:** RSM US LLP  
1250 H Street NW Suite 700  
Washington, DC 20005-1700  
ATTN: Shelley Brown  
(P) 571-341-4051  
shelley.brown@rsmus.com

**12b. Ordering procedures:** See Federal Acquisition Regulation (FAR) 8.405-3.

**13. Payment address:** Accounts Payable  
5155 Paysphere Circle  
Chicago, IL 60674  
(P) 703-336-6571  
(F) 703-336-6401  
remittanceadvice@rsmus.com  
ABA No.: 071000039  
Acct No.: 5800965054

**14. Warranty provision:** Contractor's standard commercial warranty.

**15. Export Packing Charges:** N/A

**16. Terms and conditions of rental, maintenance, and repair:** N/A

**17. Terms and conditions of installation:** N/A

**18a. Terms and conditions of repair parts:** N/A

**18b. Terms and conditions for any other services:** N/A

**19. List of service and distribution points:** N/A

**20. List of participating dealers:** N/A

**21. Preventive maintenance:** N/A

**22a. Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants:**  
N/A

**22b. If applicable, indicate that Section 508 compliance information is available for the information and communications technology (ICT) products and services and show where full details can be found (e.g. contractor's website or other location.) ICT accessibility standards can be found at:**  
<https://www.Section508.gov/>. N/A

**23. Unique Entity Identifier (UEI) Number:** PPMELNGHXQK3

**24. Notification regarding registration in System for Award Management (SAM) database:**  
RSM US LLC is registered at SAM.gov.

## GSA Awarded Pricing

The rates are inclusive of the Industrial Funding Fee (IFF) of 0.75%.

SIN	Labor Category	GSA Rate w/ IFF
522310, 531210	Director/Principal	\$219.90
522310, 531210	Experienced Senior	\$171.03
522310, 531210	Manager	\$195.47
522310, 531210	Managing Director/Partner	\$219.90
522310, 531210	Paraprofessional *	\$68.41
522310, 531210	Senior	\$141.71
522310, 531210	Senior Manager	\$263.88
522310, 531210	Staff	\$112.39
54151HACS	Cyber Associate	\$146.60
54151HACS	Cyber Manager	\$219.90
54151HACS	Cyber Partner/Principal	\$328.38
54151HACS	Cyber Senior Associate	\$192.53
54151HACS	Cyber Supervisor	\$192.53
54151S	IT Associate	\$161.26
54151S	IT Director	\$244.33
54151S	IT Manager	\$219.90
54151S	IT Senior Associate	\$185.69
54151S	IT Supervisor	\$195.47
541611	Management Advisory Services Associate	\$98.07
541611	Management Advisory Services Director	\$227.85
541611	Management Advisory Services Manager	\$190.90
541611	Management Advisory Services Partner/Principal	\$268.00
541611	Management Advisory Services Senior Associate	\$107.04
541611	Management Advisory Services Supervisor	\$152.30
541690E	ESG Consultant	\$244.33
541990RISK	Risk Advisory Services Associate	\$146.60
541990RISK	Risk Advisory Services Director	\$295.15
541990RISK	Risk Advisory Services Manager	\$249.22
541990RISK	Risk Advisory Services Partner/Principal	\$328.38
541990RISK	Risk Advisory Services Senior Associate	\$192.53

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

## Labor Category Descriptions SIN 522310 and 531210

### Director/Principal

**Functional Responsibility:** Leads and reviews results of projects and assignments. Is involved with indirect supervision and “big picture” problem solving. Responsible for maintaining key client relationships and delivering quality and risk management plans. Client contact for complex questions and information. Advises client on various business and technology risks in given industry. Identifies and discusses key financial and nonfinancial performance measures. Formulates and communicates project plans and assignments. May answer complex questions involving extensive technical skill. Reviews potentially complex financial statements, disclosures, and/or returns. Specialized experience may include industry knowledge, best practice definition and implementation, enterprise risk management, internal controls, performance management, advanced analytical analysis and modeling, project management, facilitation, training, and process improvement.

**Minimum Education:** Bachelors

**Minimum Experience:** 10 years

### Experienced Senior

**Functional Responsibility:** Supervises and reviews the results of projects and assignments. May train those with less experience. Responsible for performance evaluations on lower-level employees. Assists in achieving engagement profitability. Applies extensive technical skill consistently in complex situations. Suggests generally accepted accounting, auditing, or risk management procedures. Documents, validates tests and assesses processes, systems, and/or programs. Drafts detailed reviews of financial statements, disclosures, reports, and/or other deliverables. Makes suggestions to improve client internal controls, procedures and/or policies. May advise client on various business and technology risks in their industry. Specialized experience may include industry knowledge, best practice definition and implementation, internal controls, performance management, analytical analysis, facilitation, and process improvement.

**Minimum Education:** Bachelors

**Minimum Experience:** 4 years

### Manager

**Functional Responsibility:** Manages, directs, and reviews the results of specific projects and assignments. May train those with less experience. Responsible for performance evaluations on lower-level employees. Responsible for day-to-day client interaction. Assists in resolving complex accounting, auditing, financial analysis, business, or technology risk management issues. Client contact for challenging questions and information. Responsible for engagement profitability. Applies extensive technical skill consistently in complex situations. Suggests generally accepted accounting, auditing, or risk management procedures. Documents, validates tests and assesses processes, systems, and/or programs. Drafts detailed reviews of financial statements, disclosures, reports, and/or other deliverables. Makes suggestions to improve client internal controls, procedures and/or policies. May advise client on various business and technology risks in their industry. Specialized experience may include industry knowledge, best practice definition and implementation, enterprise risk management,

internal controls, performance management, analytical analysis and modeling, project management, facilitation, training, and process improvement.

**Minimum Education:** Bachelors

**Minimum Experience:** 5 years

### Managing Director/Partner

**Functional Responsibility:** Oversees, directs, and reviews results of projects and assignments. Is involved with indirect supervision. Leads “big picture” problem solving. Responsible for maintaining key client relationships and ensuring services quality and risk management. Client contact for complex questions and information. Advises client on various business and technology risks in given industry. Identifies and discusses key financial and non-financial performance measures. Formulates and communicates project plans and assignments. May answer complex questions involving extensive technical skill. Specialized experience may include industry knowledge, best practice definition and implementation, enterprise risk management, internal controls, performance management, advanced analytical analysis and modeling, project management, facilitation, training, and process improvement.

**Minimum Education:** Bachelors

**Minimum Experience:** 12 years

### Paraprofessional \*

**Functional Responsibility:** Performs specific steps under direction of senior staff at consulting engagement. Drafts work products and reports under supervision and in adherence with prescribed formats. Assists clients and team members with routine financial and business functions.

\* Note: Paraprofessional pursuing Associate Degree in relevant business/technical field

**Minimum Education:** High School

**Minimum Experience:** 0 years

### Senior

**Functional Responsibility:** Takes direction from other, more experienced members of team. Involved in all stages of a project, using appropriate systems and/or advanced technical knowledge. Includes day-to-day “in-charge” responsibilities. Supervises those at lower levels. Client contact for basic questions and information. Documents, validates, tests, and assesses various processes, systems, and/or programs. Specialized experience may include best practice definition and implementation, internal controls, performance management, analytical analysis, and process improvement.

**Minimum Education:** Bachelors

**Minimum Experience:** 2 years

### Senior Manager

**Functional Responsibility:** Manages, directs, and reviews the results of multiple concurrent projects and assignments. May train those with less experience. Responsible for performance evaluations on lower-

level managers and employees. Responsible for oversight of day-to-day client interaction. Resolves complex accounting, auditing, financial analysis, business, or technology risk management issues. Client contact for more complex questions and information. Responsible for engagement profitability. Applies extensive technical skill consistently in complex situations. Suggests generally accepted accounting, auditing, or risk management procedures. Documents, validates tests and assesses processes, systems, and/or programs. Drafts and performs detailed reviews of potentially complex financial statements, disclosures, reports, and/or other deliverables. Makes suggestions to improve client internal controls, procedures and/or policies. May advise client on various business and technology risks in their industry. Specialized experience may include industry knowledge, best practice definition and implementation, enterprise risk management, internal controls, performance management, advanced analytical analysis and modeling, project management, facilitation, training, and process improvement.

**Minimum Education:** Bachelors

**Minimum Experience:** 8 years

**Staff**

**Functional Responsibility:** Assists in all stages of a project, using appropriate systems and/or limited technical knowledge to complete tasks. May train and supervise others at a lower level. May be involved with review engagements, procedures engagements, or basic financial and management issues.

**Minimum Education:** Bachelors

**Minimum Experience:** 0 years

**YEARS OF EXPERIENCE SUBSTITUTIONS**

- A general educational development credential or vocational degree can be substituted for a high school diploma; three years of experience along with a high school diploma can be substituted for a bachelors degree.
- A masters degree can be substituted for five years of experience; and a doctorate can be substituted for eight years of experience.
- Certification in a specialized field that does not have traditional educational experience can be substituted for any educational requirements, provided the certification is commensurate with years of experience.
- Five years of experience in a specialized area may be substituted for any minimum education requirements.

Labor Category	Standard Qualifications		Substitution				
	Min Edu	Min Exp	PhD	Masters	Bachelors	Associates	High School
Director/Principal	Bachelors	10	2	5	10	N/A	13

Labor Category	Standard Qualifications		Substitution				
	Min Edu	Min Exp	PhD	Masters	Bachelors	Associates	High School
Experienced Senior	Bachelors	4	0	0	4	N/A	7
Manager	Bachelors	5	0	0	5	N/A	8
Managing Director/Partner	Bachelors	12	4	7	12	N/A	15
Paraprofessional *	High School	0	0	0	0	N/A	0
Senior	Bachelors	2	0	0	2	N/A	5
Senior Manager	Bachelors	8	0	3	8	N/A	11
Staff	Bachelors	0	0	0	0	N/A	3

## Labor Category Descriptions SIN 54151HACS

### Cyber Associate

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**Functional Responsibilities:** Acts within a staff role for cybersecurity projects related to engineering, implementation, and monitoring of security measures for the protection of computer systems, networks, and information. Applies knowledge and expertise of thorough understanding of the latest security principles, techniques, and protocols and of designing, deploying, and supporting systems in secure environments across multiple domains including those across the NIST Cybersecurity Framework. Applies hands-on experience in security systems, including firewalls, intrusion detection systems, anti-virus software, authentication systems, log management, content filtering, etc., as well as with network security, networking technologies, and with system, security, and network monitoring tools, to implement cybersecurity solutions. Assists with identification and definition of system security requirements and vulnerabilities. May configure and troubleshoot security infrastructure devices. May develop technical solutions and perform technical testing to help mitigate security vulnerabilities and automate repeatable tasks. May support and provide guidance for implementation of APIs, orchestration, automation, DevSecOps and databases. Develops and maintains technical project documentation and Standard Operating Procedures (SOPs).

**Minimum Education:** Bachelors

**Minimum Experience:** 1 year

### Cyber Manager

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**Functional Responsibilities:** Provides oversight, leadership, and industry subject matter expertise for cybersecurity projects related to engineering, implementation, and monitoring of security measures for the protection of computer systems, networks, and information. Applies knowledge and expertise of thorough understanding of the latest security principles, techniques, and protocols and of designing, deploying, and supporting systems in secure environments across multiple domains including those across the NIST Cybersecurity Framework. Applies hands-on experience in security systems, including firewalls, intrusion detection systems, anti-virus software, authentication systems, log management, content filtering, etc., as well as with network security, networking technologies, and with system, security, and network monitoring tools, to implement cybersecurity solutions. Assists with identification and definition of system security requirements and vulnerabilities. May configure and troubleshoot security infrastructure devices. May develop technical solutions and perform technical testing to help mitigate security vulnerabilities and automate repeatable tasks. May support and provide guidance for implementation of APIs, orchestration, automation, DevSecOps and databases. Develops and maintains technical project documentation and Standard Operating Procedures (SOPs). Manages teams of individuals as well as supervises and/or provides technical direction to one or more subordinates.

**Minimum Education:** Bachelors

**Minimum Experience:** 6 years

### Cyber Partner/Principal

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**Functional Responsibilities:** Manages the client relationship and provides oversight, leadership, and industry subject matter expertise for cybersecurity projects related to engineering, implementation, and

monitoring of security measures for the protection of computer systems, networks, and information. Applies knowledge and expertise of thorough understanding of the latest security principles, techniques, and protocols and of designing, deploying, and supporting systems in secure environments across multiple domains including those across the NIST Cybersecurity Framework. Applies hands-on experience in security systems, including firewalls, intrusion detection systems, anti-virus software, authentication systems, log management, content filtering, etc., as well as with network security, networking technologies, and with system, security, and network monitoring tools, to implement cybersecurity solutions. Assists with identification and definition of system security requirements and vulnerabilities. May configure and troubleshoot security infrastructure devices. May develop technical solutions and perform technical testing to help mitigate security vulnerabilities and automate repeatable tasks. May support and provide guidance for implementation of APIs, orchestration, automation, DevSecOps and databases. Develops and maintains technical project documentation and Standard Operating Procedures (SOPs). Manages teams of individuals as well as supervises and/or provides technical direction to one or more subordinates. Takes ultimate responsibility for every aspect of service delivery and management of the relationship.

**Minimum Education:** Bachelors

**Minimum Experience:** 15 years

### Cyber Senior Associate

**Functional Responsibilities:** Acts within a senior level role for cybersecurity projects related to engineering, implementation, and monitoring of security measures for the protection of computer systems, networks, and information. Applies knowledge and expertise of thorough understanding of the latest security principles, techniques, and protocols and of designing, deploying, and supporting systems in secure environments across multiple domains including those across the NIST Cybersecurity Framework. Applies hands-on experience in security systems, including firewalls, intrusion detection systems, anti-virus software, authentication systems, log management, content filtering, etc., as well as with network security, networking technologies, and with system, security, and network monitoring tools, to implement cybersecurity solutions. Assists with identification and definition of system security requirements and vulnerabilities. May configure and troubleshoot security infrastructure devices. May develop technical solutions and perform technical testing to help mitigate security vulnerabilities and automate repeatable tasks. May support and provide guidance for implementation of APIs, orchestration, automation, DevSecOps and databases. Develops and maintains technical project documentation and Standard Operating Procedures (SOPs). May supervise and/or provide technical direction to one or more subordinates.

**Minimum Education:** Bachelors

**Minimum Experience:** 4 years

### Cyber Supervisor

**Functional Responsibilities:** Leads cybersecurity projects related to engineering, implementation, and monitoring of security measures for the protection of computer systems, networks, and information. Applies knowledge and expertise of thorough understanding of the latest security principles, techniques, and protocols and of designing, deploying, and supporting systems in secure environments across multiple domains including those across the NIST Cybersecurity Framework. Applies hands-on

experience in security systems, including firewalls, intrusion detection systems, anti-virus software, authentication systems, log management, content filtering, etc., as well as with network security, networking technologies, and with system, security, and network monitoring tools, to implement cybersecurity solutions. Assists with identification and definition of system security requirements and vulnerabilities. May configure and troubleshoot security infrastructure devices. May develop technical solutions and perform technical testing to help mitigate security vulnerabilities and automate repeatable tasks. May support and provide guidance for implementation of APIs, orchestration, automation, DevSecOps and databases. Develops and maintains technical project documentation and Standard Operating Procedures (SOPs). May supervise and/or provide technical direction to one or more seniors or associate level subordinates.

**Minimum Education:** Bachelors

**Minimum Experience:** 5 years

**Allowable substitutions**

RSM will provide only people who meet or exceed the minimum qualifications within the labor category descriptions stated herein. RSM labor categories provide for substituting experience for minimum education requirements and substituting educational and professional degrees for years of experience. These substitutions are allowed for all labor categories unless specified in the description. The table below presents the allowable substitutions for SINS 54151HACS based on the education and experience of the labor categories in the descriptions above. Experience should be professional, and job related, however it does not have to be specific to the project to be accomplished. However, if a degree is used in place of experience, the degree should be related to the project or task. In general, where it is not stated, the following experience table may be substituted for not having the required degree, unless otherwise specified in the job description.

Allowable Substitutions	
Degree	Degree and experience and education substitutions
Bachelors	Associates + 4 years relevant experience or 6 years relevant experience

Labor Category	Standard Qualifications		Substitution				
	Min Edu	Min Exp	PhD	Masters	Bachelors	Associates	High School
Cyber Associate	Bachelors	1	N/A	N/A	1	5	7
Cyber Manager	Bachelors	6	N/A	N/A	6	10	12
Cyber Partner/Principal	Bachelors	15	N/A	N/A	15	19	21

Labor Category	Standard Qualifications		Substitution				
	Min Edu	Min Exp	PhD	Masters	Bachelors	Associates	High School
Cyber Senior Associate	Bachelors	4	N/A	N/A	4	8	10
Cyber Supervisor	Bachelors	5	N/A	N/A	5	9	11

## Labor Category Descriptions SIN 54151S

### IT Associate

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**Functional Responsibilities:** Supports IT team with requirements gathering sessions with clients. Supports team with design documentation. Takes an active role in the development of the D365 CE system. Works well with IT team members, clients, and other vendors. Participates in the Agile and/or Microsoft SureStep Iterative Methodologies.

**Minimum Education:** Bachelors

**Minimum Experience:** 1 years

### IT Director

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**Functional Responsibilities:** Analyzes front office processes (sales, marketing and customer service) to identify opportunities for improvement. Performs gap analysis between a client's requirements and the functionality within Microsoft D365 CE. Configures the application to meet a client's requirements using the Microsoft D365 CE. Takes initiative and manages the consulting team as well as the client team and develops strong working relationships with clients while mentoring the consultants deployed on the project. Implements and deploys Microsoft D365 CE. Implements proper quality assurance processes including unit and exploratory tests of all new development efforts and debugging/research/identification of suspected bugs. Develops Microsoft D365 CE strategies, best practices, and approaches. Designs and integrates business processes and data flows between Microsoft D365 CE applications and other applications, such as back office/ERP applications.

**Minimum Education:** Bachelors

**Minimum Experience:** 7 years

### IT Manager

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**Functional Responsibilities:** Responsible for planning, coordination, and execution of all aspects of assigned IT projects throughout the project lifecycle. Establishes Cost Benefit Analysis through required phases of the project. Throughout the life of the project, responsible for communicating regularly to IT Director and stakeholders the project status, risk, and issues. Responsible for IT project planning including assembling project teams, assigning project team deliverables, and developing project plans, schedules, and budgets. During project execution, responsible for managing approved objectives, budget, schedule, resources, and deliverables that support the business goals. Revises project plan as appropriate to meet changing needs and requirements while following SDLC methodology. Responsible for managing all aspects of CE implementations.

**Minimum Education:** Bachelors

**Minimum Experience:** 7 years

### IT Senior Associate

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**Functional Responsibilities:** Leads IT requirements gathering sessions with clients. Creates design documentation. Takes an active role in the development of the D365 CE system. Works well with IT

team members, clients, and other vendors. POC for client interactions. Participates in the Agile and/or Microsoft SureStep Iterative Methodologies.

**Minimum Education:** Bachelors

**Minimum Experience:** 3 years

**IT Supervisor**

**Functional Responsibilities:** Partners with IT Manager and Director on planning, coordination, and execution of all aspects of assigned projects throughout the IT project lifecycle. Establishes Cost Benefit Analysis through required phases of the project. Communicates regularly to IT Director and stakeholders the project status, risk, and issues. Assembles project teams; assign project team deliverables; and develop project plans, schedules, and budgets. Manages approved project objectives, budget, schedule, resources, and deliverables that support the business goals. Revises IT project plan as appropriate to meet changing needs and requirements while following SDLC methodology.

**Minimum Education:** Bachelors

**Minimum Experience:** 5 years

**Allowable substitutions**

RSM will provide only people who meet or exceed the minimum qualifications within the labor category descriptions stated herein. RSM labor categories provide for substituting experience for minimum education requirements and substituting educational and professional degrees for years of experience. These substitutions are allowed for all labor categories unless specified in the description. The table below presents the allowable substitutions for SINS 54151S based on the education and experience of the labor categories in the descriptions above. Experience should be professional, and job related, however it does not have to be specific to the project to be accomplished. However, if a degree is used in place of experience, the degree should be related to the project or task. In general, where it is not stated, the following experience table may be substituted for not having the required degree, unless otherwise specified in the job description.

Allowable Substitutions	
Degree	Degree and experience and education substitutions
Bachelors	Associates + 4 years relevant experience or 6 years relevant experience

Labor Category	Standard Qualifications		Substitution				
	Min Edu	Min Exp	PhD	Masters	Bachelors	Associates	High School
IT Associate	Bachelors	1	N/A	N/A	1	5	7

Labor Category	Standard Qualifications		Substitution				
	Min Edu	Min Exp	PhD	Masters	Bachelors	Associates	High School
IT Director	Bachelors	7	N/A	N/A	7	11	13
IT Manager	Bachelors	7	N/A	N/A	7	11	13
IT Senior Associate	Bachelors	3	N/A	N/A	3	7	9
IT Supervisor	Bachelors	5	N/A	N/A	5	9	11

## Labor Category Descriptions SIN 541611

### Management Advisory Services Associate

**Functional Responsibility:** Assists in all stages of a project, using appropriate systems and/or limited technical knowledge to complete tasks. May be involved with review engagements, procedures engagements, or basic management, issues, risks, and program/project management reporting and/or analysis.

**Minimum Education:** Bachelors

**Minimum Experience:** 1 year

### Management Advisory Services Director

**Functional Responsibility:** Leads and reviews results of projects and assignments. Is involved with indirect supervision and “big picture” problem solving. As aware and a thought leader in the industry and can provide the necessary people, process, and operational technology solutions to the client. Client contact for complex questions and information. Formulates and communicates project plans and assignments and is responsible for the overall Program Plan and the execution of resources deployed on a Project. May answer complex questions involving extensive technical skill. Specialized experience may include best practice definition and implementation, facilitation, training, project management, systems engineering, methodology development and deployment, process re-engineering, change management, organizational development, advanced analysis, and modeling capabilities.

**Minimum Education:** Bachelors

**Minimum Experience:** 8 years

### Management Advisory Services Manager

**Functional Responsibility:** Supervises, directs, and reviews the results of projects and assignments. May train those with less experience. Responsible for performance evaluations on lower-level employees. Has authority for hiring and firing decisions. Client contact for more complex questions and information. Responsible for engagement profitability. Applies extensive technical and subject matter expertise/skill consistently in complex situations. Documents, validates tests and assesses processes, systems, and/or programs. Makes suggestions to improve client process and recommends ways to support to mission of the organization from an operational perspective. May advise client on various economic and legal risks in their industry. Specialized experience may include facilitation, training, survey development, advanced analysis, modeling, and process improvement.

**Minimum Education:** Bachelors

**Minimum Experience:** 6 years

### Management Advisory Services Partner/Principal

**Functional Responsibility:** Leads and reviews results of project and assignments. Is involved with indirect supervision and “big picture” problem solving. Client contact for complex questions and information. Advises client on various economic and legal risks in given industry. Formulates and communicates project plans and assignments. May answer complex questions involving extensive

technical skill. Manages quality and risk. Specialized experience may include best practice definition and implementation, facilitation, training, project management, methodology development and deployment, process re-engineering, change management, organizational development, advanced analysis, and modeling capabilities.

**Minimum Education:** Bachelors

**Minimum Experience:** 10 years

#### **Management Advisory Services Senior Associate**

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**Functional Responsibility:** Functions as a team leader, supports and assists in all stages of a project, develops tools and templates to add in providing client deliverables, using appropriate systems and/or subject matter expertise to complete tasks. May train and supervise others at a lower level. May be involved with reviewing engagement project plans, procedures, or reporting on basic management issues.

**Minimum Education:** Bachelors

**Minimum Experience:** 2 years

#### **Management Advisory Services Supervisor**

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**Functional Responsibility:** Takes direction from other, more experienced members of the team. Involved in all stages of a project, using appropriate systems and/or advanced technical knowledge. Includes day-to-day “in-charge” responsibilities. Supervises those at lower levels. Client contact for basic questions and information. Documents, validates, tests, and assesses various processes, systems, and/or programs. Specialized experience may include facilitation, training, survey development, advanced analysis, modeling, and process improvement.

**Minimum Education:** Bachelors

**Minimum Experience:** 4 years

### Allowable substitutions

RSM will provide only people who meet or exceed the minimum qualifications within the labor category descriptions stated herein. RSM labor categories provide for substituting experience for minimum education requirements and substituting educational and professional degrees for years of experience. These substitutions are allowed for all labor categories unless specified in the description. The table below presents the allowable substitutions for SINS 541611 based on the education and experience of the labor categories in the descriptions above. Experience should be professional, and job related, however it does not have to be specific to the project to be accomplished. However, if a degree is used in place of experience, the degree should be related to the project or task. In general, where it is not stated, the following experience table may be substituted for not having the required degree, unless otherwise specified in the job description.

Allowable Substitutions	
Degree	Degree and experience and education substitutions
Bachelors	Associates + 4 years relevant experience or 6 years relevant experience

Labor Category	Standard Qualifications		Substitution				
	Min Edu	Min Exp	PhD	Masters	Bachelors	Associates	High School
Management Advisory Services Associate	Bachelors	1	N/A	N/A	1	5	7
Management Advisory Services Director	Bachelors	8	N/A	N/A	8	12	14
Management Advisory Services Manager	Bachelors	6	N/A	N/A	6	10	12
Management Advisory Services Partner/Principal	Bachelors	10	N/A	N/A	10	14	16
Management Advisory Services Senior Associate	Bachelors	2	N/A	N/A	2	6	8
Management Advisory Services Supervisor	Bachelors	4	N/A	N/A	4	8	10

## Labor Category Descriptions SIN 541690E

### ESG Consultant

**Functional Responsibility:** RSM's ESG Consultant is responsible for complete client satisfaction with the services and the delivery of all relevant reporting and deliverables and will be an active participant at throughout the project. They are responsible for conducting project activities and developing all deliverables, including attending interviews and workshops, performing, and reviewing research, conducting information and data analysis, and developing all reports and project artifacts. They will also meet regularly with the client to establish whether the team is meeting expectations and how they can improve if not, including updating the client on day-to-day matters to keep them informed about progress and promptly address questions and concerns.

**Minimum Education:** Bachelors

**Minimum Experience:** 8 years

### Allowable substitutions

RSM will provide only people who meet or exceed the minimum qualifications within the labor category descriptions stated herein. RSM labor categories provide for substituting experience for minimum education requirements and substituting educational and professional degrees for years of experience. These substitutions are allowed for all labor categories unless specified in the description. The table below presents the allowable substitutions for SINS 541690E based on the education and experience of the labor categories in the descriptions above. Experience should be professional, and job related, however it does not have to be specific to the project to be accomplished. However, if a degree is used in place of experience, the degree should be related to the project or task. In general, where it is not stated, the following experience table may be substituted for not having the required degree, unless otherwise specified in the job description.

Allowable Substitutions	
Degree	Degree and experience and education substitutions
Bachelors	Associates + 4 years relevant experience or 6 years relevant experience

Labor Category	Standard Qualifications		Substitution				
	Min Edu	Min Exp	PhD	Masters	Bachelors	Associates	High School
ESG Consultant	Bachelors	8	N/A	N/A	8	12	14

## Labor Category Descriptions SIN 541990RISK

### Risk Advisory Services Associate

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**Functional Responsibilities:** Performs detailed testing and is responsible for primary preparation of risk-related work products. Participates in meetings with key client personnel. Informs superiors of status of assigned work.

**Minimum Education:** Bachelors

**Minimum Experience:** 1 year

### Risk Advisory Services Director

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**Functional Responsibilities:** Leads the day-to-day activities of the engagement team and provides executive-level oversight. Participates in risk project meetings and provides insights and oversight of the overall project. Reviews and approves final deliverables and participates in engagement briefings with senior leadership. Answers questions from the team regarding the subject matter of the engagement and provides technical input regarding risk-related matters.

**Minimum Education:** Bachelors

**Minimum Experience:** 8 years

### Risk Advisory Services Manager

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**Functional Responsibilities:** Manages the day-to-day activities of the engagement team. Monitors overall engagement progress to ensure completion of deliverables in accordance with the agreed-upon schedule. Provides client leadership with status updates and coordinates ongoing interactions with the client. Provides oversight of all team activities and performs general review of work products and deliverables for adherence to quality standards. Acts as a technical subject matter resource regarding risk-related topics.

**Minimum Education:** Bachelors

**Minimum Experience:** 6 years

### Risk Advisory Services Partner/Principal

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**Functional Responsibilities:** Takes ultimate responsibility for every aspect of service delivery and management of the relationship. Participates in risk project meetings and provides insights and oversight of the overall project. Reviews and approves final deliverables and participates in engagement briefings with senior leadership.

**Minimum Education:** Bachelors

**Minimum Experience:** 11 years

### Risk Advisory Services Senior Associate

**Functional Responsibilities:** Supervises Associates and leads the technical aspects of the engagement work. Performs detailed review of work performed by Associates and takes primary responsibility for generation of certain deliverables. Provides status updates to Risk Advisory Services Manager. Leads certain client meetings to cover risk-related topics. Leads coordination and execution of client meetings to cover risk-related topics.

**Minimum Education:** Bachelors

**Minimum Experience:** 4 years

### Allowable substitutions

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Allowable Substitutions	
Degree	Degree and experience and education substitutions
Bachelors	Associates + 4 years relevant experience or 6 years relevant experience

Labor Category	Standard Qualifications		Substitution				
	Min Edu	Min Exp	PhD	Masters	Bachelors	Associates	High School
Risk Advisory Services Associate	Bachelors	1	N/A	N/A	1	5	7
Risk Advisory Services Director	Bachelors	8	N/A	N/A	8	12	14
Risk Advisory Services Manager	Bachelors	6	N/A	N/A	6	10	12
Risk Advisory Services Partner/Principal	Bachelors	11	N/A	N/A	11	15	17
Risk Advisory Services Senior Associate	Bachelors	4	N/A	N/A	4	8	10

## RSM COMPANY PROFILE

### Providing insights and tailored solutions to improve public sector results

Leaders in the public sector are under considerable pressure to ensure that government entities function like a business—delivering quality services, implementing efficient processes, and setting new standards that can withstand examination. At the same time, in the face of ever-changing economic and political conditions, government must function productively and show results, all while focused on achieving its higher mission: to preserve and protect the public interest.

Our public sector experience derives from our partnering with various federal entities such as the Federal Deposit Insurance Corporation (FDIC), Department of Housing and Urban Development (HUD), and Department of Defense (DoD), and as well as with State and Local Government entities throughout the United States.

At RSM, we bring a broad portfolio of consulting capabilities to address public sector operational requirements for reporting and compliance, risk management and internal controls, business process re-engineering and operational transformation, and technology strategy and integration.

#### **Financial Advisory Services**

The current public sector environment presents both serious challenges and exciting opportunities. Managing them – and translating them into opportunities – is the major challenge faced by every public sector leader, CFO, and management team. That’s why leading public sector organizations continually assess their performance and seek to improve, drive positive change, and follow systematic, sustainable management processes:

- How comfortable are you that your organization understands and is prepared to manage a growing exposure to fraud, litigation, or other business risks? Are your compliance costs decreasing or increasing each year? Are you optimizing your compliance investments?
- If you are experiencing programmatic or budgetary growth, has your organization undertaken appropriate due diligence and integration procedures? Are you comfortable with compliance requirements?
- Have you recently experienced, or do you anticipate, special audit, investigations or inquiry by the IG or oversight authorities? Are you confident that your organization is neither paying too much or too little in procurement contracts?
- Is your accounting staff adequately trained and ready to implement new requirements for oversight, transparency and accountability?

RSM’s public sector capabilities address these challenges and others, and include regulatory and program compliance oversight services, resolution and receivership assistance services, performing and non-performing asset management services, fraud and forensic investigative services, asset sale due diligence services for real estate and secondary marketing, interim operational and management consulting services, and merger and acquisition valuation and integration services.

#### **Risk Advisory Services**

At RSM, we understand the complexity of today’s public sector environment and the resulting increase in financial and operational risks that could have a serious impact on government’s ability to protect the public interest. Risk factors associated with accounting, regulatory compliance, information technology,

operations and other aspects of government operations can be difficult to manage. These functions are rarely integrated and have their own unique management challenges. In addition, the prevention of waste, fraud and abuse have become imperative in this new era of government oversight and transparency. Questions often asked by senior executives and program managers include:

- Does your internal audit function go beyond compliance to tangible enhancement of government accountability?
- Are you convinced that you have the right balance between identifying and managing risk, and the cost of risk management?
- Do you regularly engage external subject-matter experts to help integrate best practices into your organization?

RSM's public sector capabilities address these challenges and others, and include: audit readiness and remediation; fraud, waste and abuse avoidance and analysis; internal and investigative audit services; internal controls (financial, operational, technical, and enterprise); information assurance; and security and privacy.

### **Management Consulting**

Any effort to streamline government operations must be aligned with mission and strategy and, ultimately, measured by the results achieved. Our capabilities help the public sector meet and exceed new efficiency standards, and possess the necessary expertise to facilitate how the federal government responds to a continuous stream of new mandates and evolutionary influences such as the President's Management Agenda, Government Performance and Results Act; Federal Acquisition Streamlining Act, OMB Circulars, Data Accountability and Transparency Act, Federal Activities Inventory Reform Act, and various government reinvention initiatives.

RSM's public sector capabilities address this complex environment and include business process re-engineering, program performance and process management, project/program/portfolio management, business process outsourcing, and grants management.

### **Technology Consulting**

Public sector entities need technology that works the way government works – and at all levels. Whether a smaller department with simple budgets and grants, or a large county with complex budgets, multiple projects and advanced reporting needs, we understand the challenges of serving the many needs of local and state government. In the federal government, we understand and help federal agencies address the complex requirements brought on by public law and mandates such as: Clinger-Cohen Act, E-Government Act, Federal IT Acquisition Reform Act, Data Accountability and Transparency Act; and OMB policies shaping IT shared services, strategic sourcing, open source software, data center consolidation, and cloud computing. Our experience has given us a healthy appreciation of the economics and complexities facing public servants.

RSM's public sector technology capabilities include CIO/IT strategy and management consulting, application development and integration, ERP and CRM, business intelligence and data architecture, infrastructure and cloud, content management and collaboration, and mobility. From strategy to operations, we assemble teams of talented professionals who work closely with you to develop tailored solutions to fit the unique needs of the public sector.