



Transparent Solutions, Visible Results



U.S. General Services Administration

**FEDERAL ACQUISITION SERVICE
AUTHORIZED FEDERAL SUPPLY SCHEDULE**

PRICE LIST

General Services Administration
Federal Supply Service

Schedule 520 SIN 520-15

PERIOD COVERED BY CONTRACT

January 16, 2015 THROUGH January 15, 2020

Financial and Business Services

**Outsourcing Recurring Commercial Activities for
Financial Management Services**

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

Business Size: **LARGE**

DUNS: **128198871**

GS-23F-036CA

Solix, Inc.

30 Lanidex Plaza West • Parsippany, NJ 07054-0685 • PH: 973.581.6700

Website: www.solixinc.com • Email: joebreen@joebreen.com

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COMPANY BACKGROUND

With a spotlight on issues such as regulatory compliance and budget optimization, it's critical for federal agencies and program managers to demonstrate efficiency, accountability and performance. How do you ensure the highest level of program integrity and still deliver smarter, more effective outcomes?

Founded in 2000, Solix, Inc. (Solix) specializes in grant and eligibility program management and related consulting services for public-sector and commercial clients. In a back-office capacity, Solix issues more than \$4B each year in program awards, reviews nearly 15 million transactions and manages more than 10 million customer interactions in the process. For over 15 years, we have successfully administered state- and federally-funded grant programs, including multiple programs supported by the FCC's Federal Universal Service Fund (FUSF).

In addition to operations performed in our Parsippany, NJ headquarters and in Overland Park, Kansas, we provide customer service and fulfillment operations from two Solix call centers in Charleston, Illinois and Killeen, Texas. To support our customers' demand for highly specialized expertise, we have amassed a network of more than 2,000 qualified independent subject matter experts that can be tapped for consultants and peer reviewers as appropriate.

Our Government Grant Program Solutions

Solix solutions are designed to assist in implementing and administering highly efficient and compliant programs.

We serve as a strategic partner, helping our clients invest strategically to achieve program goals while demonstrating good stewardship of funds that have been entrusted.

You can broaden the scope of your program planning, development, implementation, and performance measurement work by outsourcing small or large components of your program administration and technical services, such as:









- Program design
- Application receipt and processing
- Peer review planning and management
- Grant management services
- Process automation
- Stakeholder communications

	Specialized domain expertise across public sector agencies, regulatory landscape & program best practices
	Customized program analytics, monitoring & reporting
	History of Innovation: <ul style="list-style-type: none"> • Program methodology • Technology integration • Mobile delivery, Salesforce.com, Amazon Cloud, Cordova, etc.
	Agile and flexible, end-to-end program design
	Robust partnership philosophy vs. traditional vendor relationship

Benefits of Partnering with Solix

Ability to Scale According to Program Size and Complexity

Whether a grant program involves a high volume of brief applications that can be screened quickly for eligibility, or competitions involving a handful of technical proposals requiring

Application Review Complexity			
			
Consumer Lifeline Application	Rural School District Internet Funding	Biomedical Research Grant Application	New York City Internet Funding
Typical Application: 1-2 pages	Typical Application: 25-30 pages	Typical Application: 150 pages	Typical Application: 3,000 pages
 Typical Award: \$120/year	 Typical Award: \$30K/year	 Typical Award: \$200K/year	 Typical Award: \$200M/year

lengthy multi-stage review processes, Solix can deliver pre-award application processing that enables confident and timely award decisions.

Once awards are made, we can assist with a range of grant management activities, from once-and-done annual recertifications to evaluating grantee performance and reconciling spending against budgets.

In all cases, we quickly mobilize, train and equip staff to perform efficiently and accurately. We have proven our ability to “right-size” teams

according to the ebb and flow of program activity. When the job is done, we ramp down in an orderly manner to avoid unnecessary administrative cost, leaving well-documented records behind.

Strong Attention to Ensuring Program Integrity and Compliance

With on-staff certified fraud examiners, Solix brings professional expertise as well as compliance controls to ensure that no fraudulent activity makes its way into your program. Our experts are trained to monitor applicants and sort out areas of program risk for those who are abusing the system.

We regularly undergo third party audits of the work under our control with consistently favorable results. As evidence of our commitment to exemplary service, transparency and adherence to best practices in compliance, Solix has voluntarily sought audits to Service Organization Controls (SOC 1, Type II) standards, conducted by nationally recognized auditing firms. All such audits have been completed with unqualified opinions, without modifications – the best possible outcome.



How we help you succeed:	Why it's important:
Efficient, Cost-Effective Program Design & Administration	Eligibility programs are usually significant, high profile government imperatives
Comprehensive, Audit-Ready Reporting	Documentation tracks results and helps promote greater compliance with rules and regulations
Ensure Policy Goals are Met	Help agencies monitor programs against program rules and guidelines
Increase Program Awareness	Ensure qualified applicants apply and receive the appropriate benefits
Protect Applicant Data	Agencies can be confident that applicant data is managed in a highly secure environment
Minimize Waste, Fraud & Abuse and Ensure Program Integrity	Agencies minimize compliance risk and avoid fines via stringent process controls & reviews
Partnership Philosophy	Working as one team improves program effectiveness

GSA AWARDED TERMS & CONDITIONS

- 1a. Table of awarded special item number(s) with appropriate cross-reference to item descriptions and awarded prices.

**SIN 520 15 – Outsourcing Recurring Commercial Activities for
Financial Management Services**

- 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 Below

- 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 Pricing Below

2. Maximum Order:

SIN 520 15 : \$1,000,000.00

3. Minimum Order:

\$100.00

4. Geographic Coverage (Delivery Area):

48 Contiguous States, the District of Columbia, Puerto Rico, Hawaii

5. Point(s) of production (city, county, and state or foreign country).

**Solix, Inc.
30 Lanidex Plaza West
PO Box 685
Parsippany, NJ 07054-0685**

6. Discount from list prices or statement of net price.

GSA Net pricing shown in pricing tables provided

7. Quantity Discounts:

None

8. Prompt Payment Terms:

0%, Net 30 Days

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

- 9b. Government purchase cards **are accepted** above the micro-purchase threshold.
10. Foreign Items (List items by country of origin):
None
- 11a. Time of Delivery:
Specified on task order
- 11b. Expedited Delivery:
Please contact contractor for expedited delivery
- 11c. Overnight and 2-day Delivery:
Please contact contractor for overnight and 2- day delivery
- 11d. Urgent Requirements:
Please contact contractor for urgent requirements
12. F.O.B. Point(s):
Destination
- 13a. Ordering Address:
**Solix, Inc.
30 Lanidex Plaza West
PO Box 685
Parsippany, NJ 07054-0685**
- 13b. Ordering procedures: For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs), and a sample BPA can be found at the GSA/FSS Schedule homepage fss.gsa.gov/schedules.
14. Payment Address:
**Solix, Inc.
30 Lanidex Plaza West
PO Box 685
Parsippany, NJ 07054-0685
Attn: Accounts Receivable**
15. Warranty Provision:
Not Applicable
16. Export Packing Charges, if applicable:

Not Applicable

17. Terms and conditions of Government Purchase Card acceptance (any thresholds above the micro-purchase level).

Accepted above the micro-purchase threshold

18. Terms and conditions of rental, maintenance, and repair (if applicable).

Not Applicable

19. Terms and conditions of installation (if applicable).

Not Applicable

- 20a. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable).

Not Applicable

- 20b. Terms and conditions for any other services (if applicable)

Not Applicable

21. List of service and distribution points (if applicable).

Not Applicable

22. List of participating dealers (if applicable).

Not Applicable

23. Preventive maintenance (if applicable).

Not Applicable

- 24a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants).

Not Applicable

- 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/.

Not Applicable

25. Data Universal Number System (DUNS) number:

128198871

26. Notification regarding registration in Central Contractor Registration (CCR) database.

CAGE CODE # 3DXH2

GSA Labor Categories

Grant Manager 2

Duties: Lead, manage, and implement the operations of a grant project task. Develop and maintain the assigned project plan as well as the team, resources, schedules, budget and communication process. Manage, coordinate, and monitor the day-to-day operations and work effort of assigned project task and staff to ensure grant activities are being accomplished on time, within budget, and according to quality standards, and that issues are proactively addressed or escalated when needed. Identify and manage risks. Interact with many different stakeholder groups regarding program initiatives. Gather, document, analyze, and communicate grant requirements, develop procedures, and recommend alternative solutions and process improvements based on best practices in granting and research programs. May provide technical assistance to grantees, monitor grantee performance, and support corrective action and enforcement activities. Manage and perform research, statistical or financial analysis, develop and maintain project documentation, and prepare reports and status updates for management and the client. May supervise, lead, and review the work of lower level team members or specialized project team efforts.

Experience and Education: Bachelor's Degree and 5 to 7 years related experience or equivalent combination of education, experience or relevant skill set. Possess strong management, communication, interpersonal, resource planning, budgeting, program compliance, and analytical skills. Proficient in word processing, spreadsheets, and database and software tools.

Grant Manager 1

Duties: Lead, manage and implement a grant project task under the general direction of a more senior Project Manager in meeting operational and administrative deliverables. Maintain the assigned project plan as well as the team, resources, schedules, budget and communication process. Manage, coordinate, and monitor the day-to-day operations and work effort of assigned project and staff to ensure grant activities are being accomplished on time, within budget, and according to quality standards, and that issues are proactively addressed or escalated when needed. Provide risk management. Interact with stakeholder groups regarding grant program initiatives. Gather, document, analyze, and communicate grant requirements and procedures and recommend alternative process improvements. May provide technical assistance to grantees, monitor grantee performance, and support corrective action and enforcement activities. Manage and perform research, statistical or financial analysis, develop and maintain project documentation, and prepare reports and status updates for management and the client. May supervise, lead, and review the work of lower level staff.

Experience and Education: Bachelor's Degree and 4 to 6 years related experience or equivalent combination of education, experience or relevant skill set. Possess good management, communication, attention to detail and analytical skills. Proficient in word processing, spreadsheets, and database and software tools.

Grant Analyst

Duties: Review, evaluate and audit the eligibility and compliance of grantees that are currently participating or seeking to participate in a grant or support program. Complete the review and examination of all forms and supporting documentation in accordance with established procedures and program rules for applications of high complexity or financial impact. Identify any gaps or inconsistencies in information and escalate findings, as necessary, to prevent waste, fraud, and abuse. Respond to, initiate and follow-up with grantees and other stakeholders to obtain additional information, seek clarification, answer technical questions, provide assistance, ensure grantee understanding and to communicate eligibility and funding decisions. Understand, interpret, determine, and document eligibility and funding decisions using standard operating guidelines. May perform research and conduct financial reviews, analysis and calculations. Manage queue of applications, assist in procedure development and in making recommendations regarding managerial grant issues and process improvements. May provide corrective action recommendations. Utilize, maintain and update the systems used to perform the analysis and to track and document decisions. May supervise and review the work performed by more junior level application reviewers and processors.

Experience and Education: Bachelor's degree and 3 to 5 years related experience or equivalent combination of education, experience or relevant skill set. Good management, communication, attention to detail, analytical and problem solving skills. Proficient in word processing, spreadsheets, and database and software tools.

Grant Analyst 1

Duties: Review, evaluate and audit the eligibility and compliance of grantees that are currently participating or seeking to participate in a grant or support program. Complete the review and examination of all forms and supporting documentation in accordance with established procedures and program rules for applications of moderate complexity or financial impact. Identify any gaps or inconsistencies in information and escalate findings, as necessary, to prevent possible waste, fraud and abuse. Respond to, initiate and follow-up with grantees and other stakeholders to obtain additional information, seek clarification, answer technical questions, provide assistance, ensure grantee understanding, and to communicate eligibility and funding decisions. Understand, interpret, determine, and document eligibility and funding decisions using standard operating guidelines. May perform research and conduct financial reviews, analysis

and calculations. Manage queue of applications. Utilize and update the systems used to perform the analysis and to track and document decisions. Works under general supervision with work efforts generally being reviewed by a higher level reviewer or supervisor.

Education and Experience: Bachelor's degree plus 0 to 2 years related experience or equivalent combination of education, experience or relevant skill set. Good organization, communication, attention to detail and analytical skills. Proficient in word processing, spreadsheets, database, and software tools.

Grant Analyst 2

Duties: Review, evaluate and audit the eligibility and compliance of grantees that are currently participating or seeking to participate in a grant or support program. Complete the review and examination of all forms and supporting documentation in accordance with established procedures and program rules for applications of moderate to high complexity or financial impact. Identify any gaps or inconsistencies in information and escalate findings, as necessary, to prevent possible waste, fraud, and abuse. Respond to, initiate and follow-up with grantees and other stakeholders to obtain additional information, seek clarification, answer technical questions, provide assistance, ensure grantee understanding, and to communicate eligibility and funding decisions. Understand, interpret, determine, and document eligibility and funding decisions using standard operating guidelines. May perform research and conduct financial reviews, analysis and calculations. Manage queue of applications and assist in procedure development. May provide corrective action recommendations. Utilize and update the systems used to perform the analysis and to track and document decisions. May review the work performed by more junior level application reviewers and processors.

Education and Experience: Bachelor's degree and 2 to 4 years related experience or equivalent combination of education, experience or relevant skill set. Good management, communication, attention to detail and analytical skills. Proficient in word processing, spreadsheets, and database and software tools.

Customer Service Representative 2

Duties: Answer phone and face to face inquiries to promote grant program products or services and to educate grantees or other grant stakeholders about basic to moderately complex program rules, guidelines, and procedures. May initiate interaction by placing outbound calls. Support grantee in completing orders, applications or other documentation. Answer program questions which may require research and follow-up. Escalate calls when needed. Record notes regarding interaction. May perform basic grantee eligibility screenings, data entry, document imaging and upkeep, as well as other clerical tasks. Familiar with standard practices and procedures. Use prepared

scripts and guidelines and relies on experience and judgment to accomplish work. Works under general supervision.

Basic Experience and Education: Associates Degree and 0 to 2 years related work experience or equivalent combination of education, experience or relevant skill set. Possess good communication, organization, attention to detail, and data entry skills.

Compliance Manager

Duties: Provide program expertise in the area of fraud, waste, and abuse prevention and detection. Manage, plan, coordinate and conduct compliance reviews to assess risk and evaluate grant operations and procedures as they relate to compliance activities. Analyze the patterns of behavior and data displayed by grantees or other stakeholders and recommend additional controls and analysis that would identify possible avenues of fraud and abuse. Stay abreast of emerging avenues of fraud, waste, and abuse and initiate inquiries and special analysis to be performed. Write papers and present findings and recommendations to management and the client. Provide training and guidance to Application Reviewers, Application Processors and other professionals on to how identify instances of fraud, waste, and abuse. Perform on site interviews with grantees and other stakeholders regarding questionable practices and support the activities of internal and external auditors and investigative staff.

Experience and Education: Bachelor's degree and 6 to 8 years of related experience or equivalent combination of education, experience, or relevant skill set. Possess strong management, program compliance, communication, interpersonal, organization, problem solving, attention to detail, and financial analysis skills. Certification as a CFE or CPA is highly desired.

Technical Subject Matter Expert 2

Duties: As a technology expert that possess a definitive source of knowledge, technique or expertise, consult and advise grant project team on solving strategic and technical issues. Provide grant project team with detailed insights into technical grant management system issues and processes by using his/her expert knowledge of how processes work from the bottom up. Collaborate with project team to design, develop, recommend and deliver grant management solutions in areas including but not limited to information technology, software development, infrastructure, security and compliance, and process engineering. Lead and conduct meetings and interviews with project stakeholders and summarize results. Conduct and/or direct in-depth research, analysis and studies, identify and recommend practices and technical approaches, and translate business requirements and process flows into technical specifications and algorithms. Manage and create technical documentation. Provide excellent risk assessment. Develop and prepare formal reports, documents, recommendations, and

presentations to the team and client community. May support, train and provide guidance to lower level technical staff regarding assigned technical work.

Experience and Education: Bachelor's degree and 10 to 12 years of related experience or equivalent combination of education, experience or relevant skill set. Expert technical knowledge within specialized area and excellent communication, management, analytical, problem solving and teamwork skills. Innovative thinker with ability to research and develop client solutions.

Senior Technical Subject Matter Expert

Duties: As a technology expert that possess a definitive source of knowledge, technique or expertise, consult and advise grant project team and client on solving strategic and technical issues. Provide client with insights into technical grant management system issues and processes by using his/her expert knowledge of how processes work from the bottom up. Consult with project team to design, develop, recommend and deliver grant management solutions in areas including but not limited to information technology, software development, security and compliance, and process engineering. Lead and conduct meetings and interviews with project stakeholders and interpret and summarize results. Conduct and/or direct in-depth research, analysis and studies, identify and recommend leading practices and technical approaches, and translate business requirements and process flows into technical specifications and algorithms. Provide excellent risk assessment. Develop, review and provide guidance regarding the creation of technical documentation. Develop, prepare, and present formal reports, documents, and recommendations to the team and client leadership. May supervise technical teams. Support, train and provide guidance to lower level team members regarding assigned technical work.

Experience and Education: Bachelor's degree and 12 plus years of related experience or equivalent combination of education, experience or relevant skill set. Project Management Professional certification is highly desired. Expert technical knowledge within specialized area and excellent communication, management, analytical, problem solving and teamwork skills. Innovative thinker with ability to research and develop client solutions.

Senior Grant Manager

Duties: Provide leadership, guidance, and consultation to the client and project team in the management of all operational and administrative activities related to a large or complex grant project that spans across multiple functional areas that may include technical and administrative staff. As a primary representative for the company, communicate and foster relationships on a regular basis with key stakeholders, including the most senior leaders of the client community to prioritize and resolve a

broad range of grant management issues. Identify, develop and control the overall project including the project plan, goals, objectives, teams, resources, roadmaps, schedules, budgets and communication process. Plan, monitor and direct multiple project task activities and staff to ensure all milestones and deliverables are being completed according to the plan and are in compliance with all contractual terms and state and federal laws and regulations. Ensure procedures and processes are in place to control and monitor adherence to program quality standards. Relying on subject matter expertise, ensure the development of business requirements, provide consulting support and recommend and deliver grant process improvements and solutions that may significantly impact the program and assist in identifying and preventing program fraud, waste, and abuse. Identify and manage risks and solve complex grant and financial issues. Ensure the development of project documentation and prepare project reports and status updates for client leadership and senior management.

Experience and Education: Bachelor's degree and 10 to 12 years of related experience or equivalent combination of education, experience or relevant skill set. Possess excellent leadership, strategic planning and management, communication, interpersonal, analytical, issue resolution, business and process improvement, organizational and infrastructure design, budgeting, program compliance, and resource planning skills.

Business Subject Matter Expert

Duties: As the industry, business process or function expert, consult with and advise the grant project team and client on solving complex grant management issues. Provide project team with detailed insights into the grant management issues faced by the client. The Business Subject Matter Expert relies on his/her expert knowledge of how processes work from the bottom up and has a strong understanding of how the issue and solution will impact the department and/or organization. Collaborate with project team to design, develop, recommend and implement innovative process improvements and solutions. Issues to be solved include but are not limited to: resource utilization, organization structure, finance, technology/infrastructure, program management, risk assessment, program compliance, and business/grant processes and controls. Lead and conduct meetings and interviews with project stakeholders and interpret and summarize results. Conduct in depth research, analysis, and forecasts. May define business requirements, procedures, and process flows, identify leading practices, develop business cases, and integrate results. Provide risk assessment and support team in identifying potential roadblocks and in resolving issues. Develop, prepare, and present key findings and formal reports and recommendations.

Experience and Education: Bachelor's degree and 9 to 11 years of related experience or equivalent combination of education, experience or skill set. Master's Degree is highly desired. Expert knowledge within the specialty area and excellent analytical, problem solving, communications, and teamwork skills. Innovative thinker with ability to research and develop client solutions.

GSA Labor Pricing

All Pricing is net of discounts

SIN	Labor Category	GSA Hourly Rate
520 15	Customer Service Representative 2	\$66.31
520 15	Grant Analyst 1	\$81.34
520 15	Grant Analyst 2	\$94.98
520 15	Grant Analyst	\$109.94
520 15	Grant Manager 1	\$119.40
520 15	Grant Manager 2	\$129.93
520 15	Compliance Manager	\$141.80
520 15	Business Subject Matter Expert	\$176.10
520 15	Senior Grant Manager	\$206.61
520 15	Technical Subject Matter Expert 2	\$155.70
520 15	Senior Technical Subject Matter Expert	\$206.61