

## IBM Professional Services Labor Category Descriptions

### Title: Director

**General Experience and Functional Responsibility:** Has overall Leadership and responsibility at the executive level for the client and all work performed. Coordinate's staffing and other personnel services, and products needed. Applies industry knowledge, change management, technical, functional and project management expertise. Provides client visibility for key solutions to issues. Experience with building and maintaining executive level relationships. Works with management and gauges the direction of client engagements, project definitions and business analysis. Creates the competitive strategies and integration of global solutions. Coordinates multiple projects and teams and assist client with achieving desired program results. Responsible for formulating work standards, managing client issues and feedback. Supervise designated resources and enforces quality control practices for the project.

**Minimum Education:** Bachelor's degree

**Minimum Experience:** 10 years of experience.

### Specialized Experiences:

531210	Financial Asset Resolution Services - Experience includes but not limited to Asset valuation/pricing; portfolio stratification; restructuring and disposition strategies, asset sales or other disposition; marketing; budget and credit reform analysis.
522310	Financial Advising, Loan Servicing and Asset Management Services – experience includes but not limited to, support program management, enterprise systems or related engagements. Provide management and direction on client engagements, project definition and business analysis, build executive level relationships. Project estimation and resource planning efforts and resolving issuers, meeting client expectations and timing. Identify themes capable of being developed into new strategy methodology, help in ensuring overall soundness of analytical approach and suggest alternatives.
541211	Auditing Services – Experience includes, but may not be limited to, audits (financial, performance, recovery, transportation, and contract audits; GAGAS, non GAGAS, compliance assessment. Responsible for performing work in governmental property audits, pulling PBC packages, checking, receivable and payment documents. Tracking purchases from start to finish. Responsible for formulating work standards, creating strategic project objects. Responsible for project reviews and overall contract progress and performance. Reviews high level deliverable and integrates services qualities process throughout the engagement.
541219	Budget and Financial Management Services – Experience includes , but may not be limited to areas of accounting, budgeting and financial services such as transaction analysis, transaction processing, data analysis and summarization, technical assistance in devising new and revised accounting policies and procedures, classifying accounting transactions, special studies to improve account operations, assessment and improvement of budget formulation and execution processes, special reviews to resolve budget formulation and budget execution issues and technical assistance to improve budget preparation and execution processes. Develop requirement for financial and budget systems. Work with NFC and other financial outsources agencies as needed for support business process re-engineering and transaction processing policies.
541611	Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services – experience includes, but not limited to, strategic planning, organizational planning, business process improvement, acquisitions and grants management support, facilitation, surveys, assessment and improvements of financial management systems, financial reporting and analysis, feasibility analysis, requirements determination, policy interpretation and support, process analysis and development; research studies, program analysis, portfolio validation and related support services; strategic financial planning,

	financial policy formulation and development; special cost studies, actuarial services, economic and regulatory analysis, benchmarking and program metrics; and program and project management.
611430	Professional and Management Development Training- experience includes, but not limited to analyzing training needs and develop training programs, establish detail training budgets, evaluate current training programs and instructor methods including demonstrations, conferences, classroom training, UAT's, workshops, train the training activities and more. Develop training and educational materials including visual aids, multimedia tools, training booklets and more. Facilitate web-base and on site training classes. Work with technical support to set up training user id's and resets.

**Title: Senior Manager (Senior Project Manager)**

**General Experience and Functional Responsibility:** Provides management direction and provide leadership for complex projects comprised of several work streams. Coordinates and directs the activities of other consultants and provides direct consulting support (including but not limited to Functional, technical, Training, Facilitation, Change Management and Financial responsibilities) and expertise to clients, including the resolution of project issues, quality control of deliverables, and the presentation of project findings and results to the client management. Assess program feasibility with designed solutions. Advise partners and executive directors of major developments. Review work products and oversees the drafting of reports and project deliverables. Communicates with client and other project managers. Responsible for program delivery and identifying new tools. Responsible for managing project solutions, delegating appropriate resources, and helping to integrate service quality standard across projects and deliverables.

**Minimum Education:** bachelor's degree

**Minimum Experience:** 10 years' experience

**Specialized Experience:**

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522310	Financial Advising, Loan Servicing and Asset Management Services – experience includes but not limited to, support program management, enterprise systems or related engagements. Provide management and direction on client engagements, project definition and business analysis, build executive level relationships. Project estimation and resource planning efforts and resolving issuers, meeting client expectations and timing. Identify themes capable of being developed into new strategy methodology, help in ensuring overall soundness of analytical approach and suggest alternatives.
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**Title: Manager (Project Manager)**

**General Experience and Functional Responsibility:** Provides day to day project management for smaller projects or is the team lead of a work stream within a larger project, related to, asset resolution, financial and loan advisory, acquisition, budget, training and financial management services. Coordinates and directs the activities of junior consultants and provides direct consulting support and expertise to clients including identification of project issues, reviewing elements of deliverables developed by others, and the presentation of project findings and results to lower levels of client management. Provides structure to project working groups and analyzes and understands current issues and conflicts. Recommend techniques and tools for team improvement. Lead and manages meetings and facilitate understanding of the specific engagement. Serves in the role of project team leader over assigned supported areas. Conducts analysis of work plan completeness, prepares status reports and supports quality control practices. Performs analysis of client issues, assess appropriate alternative, and recommends solutions. Works closely with group members to enhance team building, communication, interpersonal relations, meetings, and decision making.

**Minimum Education:** Bachelor’s degree

**Minimum Experience:** 7 years’ experience

**Specialized Experience:**

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**Title: Senior Management Consultant I**

**General Experience and Functional Responsibility:** Has an understanding and performs data collection role on client projects, supervises senior staff consultants, and leads small projects or task teams. Has technical knowledge, versed in a wide range of applications and principals. Leads work for practice area and larger industry teams. Develops sustainable client relationships. Develops strong working relationships with client team leads. Provides development methodology and process guidance based on Agile methodologies and related processes. Ability to interpret new and existing relations and provide operational advice and support to clients. Excellent written and verbal communication skills, including the ability to present to and influence senior stakeholders and legal teams. Ability to analyze and evaluate raw data and product reports for boards and other senior audiences.

**Minimum Education:** Bachelors Degree

**Minimum Experience:** 5 years’ experience

**Specialized Experience:**

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**Title: Senior Management Consultant III**

**General Experience and Functional Responsibility:** Provides specialized experience or expertise in multiple fields, including process analysis, redesign, including financial services related to, asset resolution, financial and loan advisor to cross cutting issues, acquisition, budget, and financial management services Advises on project methodology and coordinates analysis results with other key personnel. Applies expertise and experience to develop objectives and approaches for solutions to client issues. Provide operating leadership and assistance to improve financial portfolio’s and provide professional and management development training services. Maintains familiarity with client issues, assist with design issues, leads client teams, provides analysis of project data, assist with the development of appropriate deliverables. Uses firm tools and supports the overall objectives and goals of the program objectives. Demonstrates skills by performing status reports, verifying work plan completeness and communication with team members. Provides senior-level analytical and program support is focused on providing high performance work. Services as a senior-level analytical correspondent within the engagement team. Contributes to work plan development, reaching engagement milestones and may lead specific project task. Applies business modeling, process modeling and business design techniques. Conducts analysis of appropriate consulting tools to satisfy

program requirements and creates project deliverables. Formulates diagnoses through financial and statistical modeling, assess appropriate alternative and offers conclusions to a manager. Performs analysis and makes diagnoses, as well as defines symptoms and problems and develops conclusions.

**Minimum Education:** Bachelors Degree

**Minimum Experience:** 7 years' experience

**Specialized Experience:**

531210	Financial Asset Resolution Services - Experience includes but not limited to Asset valuation/pricing; portfolio stratification; restructuring and disposition strategies, asset sales or other disposition; marketing; budget and credit reform analysis.
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611430	Professional and Management Development Training- experience includes, but not limited to analyzing training needs and develop training programs, establish detail training budgets, evaluate current training programs and instructor methods including demonstrations, conferences, classroom training, UAT's, workshops, train the training activities and more. Develop training and educational materials including visual aids, multimedia tools, training booklets and more. Facilitate web-base and on site training classes. Work with technical support to set up training user id's and resets.

## Title: Consultant I

**General Experience and Functional Responsibility:** Assists project team members with data gathering and research, organizes data and project documents and assists project manager in the development of deliverables. Supports development of process flow diagrams, project reports, training materials, instructional design, multimedia, and other deliverables. Completed assigned task within the project scope and budget. Conducts relevant research distills data and creates reports. Support quality assurance practices and supports in the completion of accuracy of system documentation.

**Minimum Education:** Bachelors Degree

**Minimum Experience:** 1 years' experience

### Specialized Experience:

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611430	Professional and Management Development Training- experience includes, but not limited to analyzing training needs and develop training programs, establish detail training budgets, evaluate current training programs and instructor methods including demonstrations, conferences, classroom training, UAT's, workshops, train the training activities and more. Develop training and educational materials including visual aids, multimedia tools,

	training booklets and more. Facilitate web-base and on site training classes. Work with technical support to set up training user id's and resets.

**Title: Consultant II**

**General Experience and Functional Responsibility:** Manages team databases and knowledge repositories. Performs training and knowledge sharing. Experienced with frequent use and application of technical standards, principles, and theories. Assist with the completion of work plan activities, analyzes relevant data and information, and institutes and support business solutions. Provides analytical and program support. Completes assigned engagements tasks within the project scope and budget, while meeting deliverable requirements. Actively engages consulting tools and methodologies to meet project objectives and completes program management activities.

Assists with project plans, reviewing risks and analyzing relevant data.

**Minimum Education:** Bachelors Degree

**Minimum Experience:** 2 years' experience

**Specialized Experience:**

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### Title: Consultant III

**General Experience and Functional Responsibility:** Has expertise and operates across one or more industries and variety of services such as business strategy controls, operations, and policy analysis. Creates process change reports by integrating new processes with existing ones and communicating these changes as they impact Client solutions. Subject matter expertise in frequently use and application of technical standards, principles, and theories. Provides expertise to financial services related to, asset resolution, financial and loan cross cutting issues. Provides an expertise relating to acquisition, budget, and financial management services. Provide operational leadership as an expert improving financial portfolio's and provide professional and management development training services. Facilitates the accomplishments of a client's business goals. Analyzes the client business strategy, operations, and current technology architecture to develop options. May provide financial analysis to determine ROI/ROA for solutions. Provides consultations on solution planning, impact analysis, risk assessments and budgets.

**Minimum Education:** Bachelors Degree

**Minimum Experience:** 4 years' experience

**Specialized Experience:**

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**Title: Functional Specialist / SME I**

**General Experience and Functional Responsibility:** Provides expertise, guidance, consultation, facilitation, training, thought leadership and education to the client and/or project team based on a specialized expertise in such fields as technology, science, public policy, financial and administration and management. Acts as the liaison with clients, leveraging best practices, creating detail solution documents. Validating test scenarios/scripts, go-to person for detail set up and solution designing for one or more functional area.

**Minimum Education:** Bachelors Degree

**Minimum Experience:** 5 years’ experience

**Specialized Experience:**

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**Title: Functional Specialist / SME II**

**General Experience and Functional Responsibility:** Expertise in multiple fields. Provides guidance, consultation, facilitation, training, change management, thought leadership and education primarily to the client and client leadership, specialized deep expertise in such fields as financial, public policy, organization change management, business process re-engineering, administration, and management. Evaluates organizational needs, determines technical solutions, ensure requirements are met. Oversee development testing, implements software solutions. Possess exceptional track record in evaluating needs of an organization.

**Minimum Education:** Bachelors Degree

**Minimum Experience:** 15 years’ experience

**Specialized Experience:**

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541611	Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services – experience includes, but not limited to, strategic planning, organizational planning, business process improvement, acquisitions and grants management support, facilitation, surveys, assessment and improvements of financial management systems, financial reporting and analysis, feasibility analysis, requirements determination, policy interpretation and support, process analysis and development; research studies, program analysis, portfolio validation and related support services; strategic financial planning, financial policy formulation and development; special cost studies, actuarial services, economic and regulatory analysis, benchmarking and program metrics; and program and project management.
611430	Professional and Management Development Training- experience includes, but not limited to analyzing training needs and develop training programs, establish detail training budgets, evaluate current training programs and instructor methods including demonstrations, conferences, classroom training, UAT’s, workshops, train the training activities and more. Develop training and educational materials including visual aids, multimedia tools, training booklets and more. Facilitate web-base and on site training classes. Work with technical support to set up training user id’s and resets.

**Title: Program Support (Project Manager Jr.)**

**General Experience and Functional Responsibility:** Provides specialized expertise in financial and process analysis, coordinates support on multiple projects with Senior Project Managers. Identifies needs to be addressed by the project manager. Secure approval for project commencement. Outline resources required to complete project. Monitor staff performance, evaluate project effectiveness, consult, and seek guidance from project manager. Support to the project team and client in the conduct of various activities related to project risk management, contract administration, project planning, and performance measurement.

**Minimum Education:** Bachelors Degree

**Minimum Experience:** 5 years’ experience

**Specialized Experience:**

531210	Financial Asset Resolution Services - Experience includes but not limited to Asset valuation/pricing; portfolio stratification; restructuring and disposition strategies, asset sales or other disposition; marketing; budget and credit reform analysis.
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522310	Financial Advising, Loan Servicing and Asset Management Services – experience includes but not limited to, support program management, enterprise systems or related engagements. Provide management and direction on client engagements, project definition and business analysis, build executive level relationships. Project estimation and resource planning efforts and resolving issuers, meeting client expectations and timing. Identify themes capable of being developed into new strategy methodology, help in ensuring overall soundness of analytical approach and suggest alternatives.
541211	Auditing Services – Experience includes, but may not be limited to, audits (financial, performance, recovery, transportation, and contract audits; GAGAS, non GAGAS, compliance assessment. Responsible for performing work in governmental property audits, pulling PBC packages, checking, receivable and payment documents. Tracking purchases from start to finish. Responsible for formulating work standards, creating strategic project objects. Responsible for project reviews and overall contract progress and performance. Reviews high level deliverable and integrates services qualities process throughout the engagement.
541219	Budget and Financial Management Services – Experience includes , but may not be limited to areas of accounting, budgeting and financial services such as transaction analysis, transaction processing, data analysis and summarization, technical assistance in devising new and revised accounting policies and procedures, classifying accounting transactions, special studies to improve account operations, assessment and improvement of budget formulation and execution processes, special reviews to resolve budget formulation and budget execution issues and technical assistance to improve budget preparation and execution processes. Develop requirement for financial and budget systems. Work with NFC and other financial outsources agencies as needed for support business process re-engineering and transaction processing policies.
541611	Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services – experience includes, but not limited to, strategic planning, organizational planning, business process improvement, acquisitions and grants management support, facilitation, surveys, assessment and improvements of financial management systems, financial reporting and analysis, feasibility analysis, requirements determination, policy interpretation and support, process analysis and development; research studies, program analysis, portfolio validation and related support services; strategic financial planning, financial policy formulation and development; special cost studies, actuarial services, economic and regulatory analysis, benchmarking and program metrics; and program and project management.
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**DEGREE SUBSTITUTION**

The Skill Descriptions above describe the functional responsibilities, education and experience requirements for each labor category. This serves as a guide to the experience and educational background of personnel typically found in each labor category.

However, the experience of a resource is often a valid substitute for education. In addition, certifications and professional licenses achieved by a resource are a validation of the professional skill levels and experience within that resources' area of expertise.

With this noted, the following chart indicates where experience or 'other equivalences' may be substituted for the degree attained by a resource. Where there is experience equivalence, this equivalence is in addition to the minimum experience indicated in the Skill Description.

**Substitution Table**

<b>Degree</b>	<b>Education /Experience Equivalence to Degree</b>	<b>OR Other Equivalence to Degree</b>
Bachelors	Associate degree +2 years relevant experience	Professional certifications such as but not limited to, Project Management, Lean Sigma, or ITIL, with one year of successfully completed coursework and actual experience utilizing the certification principles for certification is equal to one year of college.
Masters	Bachelors +2 years relevant experience, or Associate + 4 years relevant experience	Bachelor degree plus Masters certificate or  professional license or certification, with one year of successfully completed coursework and actual experience utilizing the certification principles equating to one year of graduate-level degree.
Doctorate	Masters + 2 years relevant experience, or Bachelors + 4 years relevant experience	

\* Successful completion of higher education which has not yet resulted in a degree may be counted as 1 years of experience for each year of college completed.