

Chapter 15. IBM Professional Services

Awarded SINs 522310, 531210, 541211, 541219, 541611, 611430

1a. Table of Awarded Special Item Number(s) and Description

SIN	SIN Description
531210	Financial Asset Resolution Services Assist agencies in all asset resolution related areas including valuation / pricing, portfolio stratification, restructuring and disposition strategies which best meet agency goals. Make specific recommendations as to the best execution. Conduct a sale or other disposition vehicle. Provide marketing expertise, budget and credit reform analyses
522310	Financial Advising, Loan Servicing and Asset Management Services Services include assisting agencies on cross-cutting issues, asset marketability, equity monitoring, originations, and addressing any other considerations regarding the acquisition, management and/or resolution of an asset; assisting agencies in servicing, monitoring and maintaining loan assets such as establishing loan database, remittance processing, processing loan cancellations and consolidations, billing services, and servicing troubled loans which may include borrower negotiations, restructuring, foreclosure and supervision of the sale of the collateral and workout agreements.
541211	Auditing Services Perform financial-related audits, performance audits, recovery audits, transportation audits, and contract audits in accordance with Generally Accepted Government Auditing Standards (GAGAS) and non-GAGAS. Perform an independent assessment of an audited entity's financial statements in conformity with generally accepted accounting principles, financial information, adherence to financial compliance requirements and internal controls, or organization or program performance to identify areas for improvement. Recovery audits: identify recoverable funds resulting from overpayments, duplicate payments and underpayments under the authority of public law and regulation, e.g., Section 354 of the National Defense

	<p>Authorization Act for FY 96 (Public Law 104-106; 110 Stat. 268; 10 U.S.C. 2461),.</p> <p>Transportation audits: perform administrative reviews and rate examinations on prepayment and post payment transportation bills to ensure accuracy, completeness, and compliance with established rates, tariffs, quotations, agreements, tenders or other applicable rate authority.</p>
541219	<p>Budget and Financial Management Services Services include accounting, budgeting, and complementary financial services such as: transaction analysis, transaction processing, data analysis and summarization, technical assistance in devising new or revised accounting policies and procedures, classifying accounting transactions, special studies to improve accounting operations, assessment and improvement of budget formulation and execution processes, special reviews to resolve budget formulation or budget execution issues, and technical assistance to improve budget preparation or execution processes.</p>
541611	<p>Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services Provide operating advice and assistance on administrative and management issues. Examples include: strategic and organizational planning, business process improvement, acquisition and grants management support, facilitation, surveys, assessment and improvement of financial management systems, financial reporting and analysis, due diligence in validating an agency's portfolio of assets 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 business program and project management.</p> <p>Inherently Governmental services as identified in FAR 7.503 or by the ordering agency are prohibited. It is the responsibility of the Contracting Officer placing the order to make this determination. Ordering activities must require prospective contractors to identify potential conflicts of interest and address those, prior to task order award.</p> <p>Personal services as defined in FAR 37.104 are prohibited.</p>

611430	<p>Professional and Management Development Training 611430 services include offering an array of short duration courses and seminars for management and professional development. Training for career development may be provided directly to individuals or through employers' training programs, and courses may be customized or modified to meet the special needs of customers. Instruction may be provided in diverse settings, such as the establishment's or agency's training facilities, and through diverse means, such as correspondence, television, the Internet, or other electronic and distance-learning methods. The training provided may include the use of simulators and simulation methods. Proposed professional services shall be in support of planning, creating, and/or executing testing and test administration, learning management, internship, or development of new courses or subject matter delivered via an instructor-led (i.e. traditional classroom setting or conference/seminar) and/or web-based (i.e. Internet/Intranet, software packages and computer applications) system.</p> <p>Examples include Training Services that are instructor led Training or Web Based Training of Education Courses, Course Development and Test Administration, Learning Management, and Internships; Environmental Training Services in order to meet Federal mandates and Executive Orders; training of agency personnel to deal with media and media responses; Logistics Training Services related to system operations, automated tools for supply and value chain management, property and inventory management, distribution and transportation management, and maintenance of equipment and facilities; Audit & Financial training services related to course development and instruction required to support audit, review, financial assessment and financial management activities.</p> <p>Any firm offering Defense Acquisition Workforce Improvement Act (DAWIA) and Federal Acquisition Certification in Contracting (FAC-C) Training for Acquisition Workforce Personnel will include an identify only DAWIA and FAC-C courses that have been deemed DAU equivalent or approved by the Federal Acquisition Institute (FAI).</p> <p>NOTE: In accordance with OMB Policy Letter 05-01, civilian agencies must follow the course equivalency determinations accepted by the Defense Acquisition University (DAU) to ensure that core training is</p>
--------	--

	comparable across the workforce and qualifies for certification. When procuring FAC-C and DAWIA training for the audience identified below, the task order level Contracting Officer shall confirm that the courses being acquired are listed on one of the following websites: https://www.fai.gov/drupal/certification/verified-contracting-course-vendor-listing OR http://catalog.dau.mil/appg.aspx (click on commercial vendors). Training Audience-Acquisition professionals interested in completing FAC-C or DAWIA.
OLM	Order Level Material

IBM offers a variety of Instructor led training. As an example, IBM offers training for Agile Fundamentals. At completion, students will have an understanding of: core lean/agile values and principles, managing work in progress, continuous improvement and feedback, shifts in roles, team collaboration, adaptive planning techniques, and value-driven development along with the essential building blocks of popular agile frameworks including how DevOps powers agility. Students will also have gained the vocabulary to discuss the benefits of agile and how to avoid common pitfalls with fellow agile practitioners.

IBM Terms and Conditions for Services

IBM Terms for Services

- Client Relationship Agreement for Services – Federal Government

