CONTRACT NUMBER: 47QRAA18D0058

CONTRACTOR: The Coffman Organization, Inc.
9271 Viaggio Way
Highlands Ranch, CO 80126

WEBSITE: www.coffmanorganization.com

BUSINESS SIZE: Small Business

CONTRACT ADMINISTRATION: Kathleen Sorensen
714-425-4528 (direct)
888-999-8940
888-999-8940 (fax)

EMAIL: Kathie_sorensen@coffmanorganization.com

DUNS: 030701132

SIN: 874-1, 874-1RC Integrated Consulting Services
874-4, 874-4RC Training Services: Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration, Learning Management, Internships
100-03, 100-03RC Ancillary Supplies and/or Services

CONTRACT PERIOD: February 13, 2018 through February 12, 2023

CAGE Code: 7JMD7
1. COMPANY OVERVIEW

The Coffman Organization, Inc. has been providing Integrated Consulting Services to corporate clients since 2006; the firm was incorporated in the state of Nebraska in 2008, then reincorporated and registered in the state of Colorado in 2012.

The Coffman Organization is a Highlands Ranch, Colorado-based small business, that specializes in Integrated Consulting Services. The firm’s two (2) principals, Dr. Kathleen Sorensen, Principal Partner; and Curt Coffman, Principal Partner and Chief Science Officer, each have over thirty (30) years of industry experience. The firm’s book, *Culture Eats Strategy for Lunch*, published in 2013, is a crash course for turning culture into competitive advantage. Additionally, Mr. Coffman has authored two (2) additional books – *First, Break All the Rules* (co-authored with Marcus Buckingham), which was recognized as one of the best-selling business books of all time (by the New York Times), and *Now Follow this Path*. 
The Coffman Organization created the **NEXUS Experience**®, a revolutionary approach to measuring and building employee engagement in real time. A perfect intersection of culture and brand, the program’s culture measurement goes beyond standard measurement practices, to create a more positive and powerful experience for each employee in the process of completing an engagement survey. Instead of simply measuring engagement, The Coffman Organization’s **NEXUS Experience** process actually builds it. The firm provides data faster and in a more useful form to managers, enabling them to facilitate the use of the data to improve the workplace/culture.

Because typical engagement survey vendors take so long (six (6) to twelve (12) weeks) to deliver results, organizations fail to build momentum as part of the survey process. The Coffman Organization’s **NEXUS Experience**® program provides managers with the tools they need to engage their teams in an immediate discussion of results, and what the team can do about them.

The Coffman Organization also offers management consulting services to organizations, including **Culture Fit®**, a process designed to assist organizations in hiring the people they need to create the culture they desire for the future. Additionally, management development programs are offered, which are often a blend of in-person and virtual lessons around specific cultural markers or organizational performance goals.

Founded by Dr. Kathleen Sorensen, Principal Partner; and Curt Coffman, Principal Partner and Chief Science Officer, The Coffman Organization was incorporated in the state of Nebraska in 2008, then reincorporated and registered in the state of Colorado in 2012. Both principals had extensive consulting and leadership experience with The Gallup Organization, Inc., prior to founding The Coffman Organization. Mr. Coffman was the global practice leader for Q12 (employee engagement) and Dr. Sorensen was the global practice leader for talent selection and development. As those practices grew, the emphasis on “scalability” often prevented the development of client-centric solutions. Both co-founders left the organization, looking to use their talent and experience in a more fulfilling endeavor. The Coffman Organization’s mission is to help employees take a stronger role in creating a great workplace, which encourages their growth, productivity, and feelings of worth.

Dr. Kathleen Sorensen, Principal Partner of The Coffman Organization, is responsible for the company’s management and operations. Dr. Sorensen has extensive leadership experience in creating and delivering integrated, high-impact solutions in all aspects of people management. Focused on Human Capacity, her talent and expertise lies in the strategic analysis of corporate goals, as well as the design and implementation of selection and development interventions. Her professional responsibilities have included the development of more than sixty (60) unique talent profiles - directing the research, analysis, and training elements of the engagements. This research has been widely disseminated in the bestselling management book, *First, Break All the Rules*. Dr. Sorensen has created client-specific corporate university programs for leadership, management, sales and service, including the Great Manager Program; Sustained
Growth – a Leadership Mentoring System; Outstanding Associates Program; Leadership Development and Discovery Series; and CEO Leadership Summit. She holds a PhD., M.A. and B.A., specializing in organizational communication.

At inception, The Coffman Organization focused on providing engagement reports faster, and with lower cost than its competitors. Since that time, The Coffman Organization has increased its capabilities to provide online reports, and management development resources that can be accessed electronically. The improvement of the firm’s delivery systems, along with their mission of flexibility, allow increased responsiveness and flexibility in addressing unique client needs.

Integrated Consulting Services includes providing clients with expert management and strategy consulting, research with employees using survey planning, design and development, administration, data validation and analysis, reporting and stakeholder briefings.

The Coffman Organization assists clients in conducting an employee engagement survey with the firm’s newest NEXUS Experience approach. This consists of consulting with the organization to plan and design a culture improvement experience that would both measure and impact their culture to help them achieve even stronger business result.

The overall project includes training and certification of HR client-facing and non-client facing personnel within the organization. The certification process helps HR professionals understand project, the research that developed the methodology and their own role in the process. The NEXUS Coach Certification is conducted via webinars which are taped to support associates across the organization, where attending a live training experience is too costly or inconvenient. The process begins with a Coach Intake Interview, which coaches take on line to help The Coffman Organization understand their priorities, their interest and their talents.

As a part of the client engagement, The Coffman Organization assists clients in designing a development experience for managers and leaders. This strengthens and prepares leaders and managers to maximize the survey experience and their own role in helping the managers and employees benefit and make use of the results to create an even stronger, more effective place to work.

In support of the client’s culture development and alignment, the Coffman Organization offers consulting in a number of related areas, including management development, strengths development and performance management. The Coffman Organization’s role continues to emphasize the connection between individual attitudes and performance and help the client to increase productive energy to their goals.

Clients have often measured engagement before but found the experience less than effective for the organization, due to the time it took to get results back, the unwillingness of the vendor to customize the deliverables to the organization, and the failure of the process to help drive engagement.
Projects are completed by The Coffman Organization’s principals and the firm’s Operations Manager. Work is primarily completed virtually, from The Coffman Organization’s offices, with some meetings onsite at client request. Typically, the bulk of the survey work, consulting, and coaching is done virtually.

The Coffman Organization delivers in-depth Executive Presentations for the entire organization and key business units within.

All employees receive their own Personal Insight Report, highlighting their strengths for impacting and improving their engagement at work; all teams with four or more respondents receive a report of their work unit’s data with specific recommendations programmed based on that team’s responses to the survey items.

Managers receive ongoing managerial development support on a specific Manager Connection site branded for the organization and designed to provide information on conducting meetings, understanding the survey items, management tips, and an “Agenda Builder” to create their own agendas for their team discussion sessions. This Manager Connection serves as a communication vehicle to align managers and culture to the organization’s key goals and deliverables.

Executives are given access to all data in a “heat map” of their organization downstream which characterized the overall level of the engagement of each team, based on The Coffman Benchmarks.

**Process – Specifics**

The Coffman Organization consults with the client to determine the goals and establish the timeline (from the pilot project) on to the company census.

The core NEXUS process includes a protocol which while serving as the guide, is customized to the client’s preferred timeline and needs:

1) Pre-engagement consulting and planning
2) Survey administration
3) Analysis and reporting
4) Executive presentation and manager forum
5) Manager Connection and follow-up

Tasks needed to complete the project included:
• The consultation with the client to determine scope and create the project plan.
• The development of a timeline based on the client needs.
• The development of a client-specific roll-up structure and report plan.
• The development of the survey itself including items and instructions and paper versions.
• The development of the manager reports and executive presentation templates.
• The analysis of the data and configuration of the data into the report groups.
• The presentation of the results.
• Executive briefings with key executives.
• Management consulting and recommendations.
• Development of manager, and employee learning materials (video) and leadership learning material regarding employee engagement and why it matters.
• Development of a NEXUS Coaching Certification process.
• Content testing (learning mastery checks) for the NEXUS Coaching Certification.
• The development of an Energy Planning system.
• The development of lessons (learning drips) for the Manager Connection Portal and the administration of this on-going follow-up system.

The Coffman Organization utilizes a sophisticated survey system, manager connection, data analysis tools and reporting tools, which are customized to use with clients to make them more efficient in the implementation of the firm’s services. The firm used screen sharing, web-based services (GoToMeeting) to consult with the client and collaborate in the development of learning materials or the delivery of content to the client.

The Coffman Organization complies with all federal, state and local laws at all times. All other compliance requirements are adhered to as long as all contract-specific compliance related matters are fully disclosed in corresponding solicitation materials. The firm pledged and provided complete employee confidentiality when completing the work on this project. Employee responses were summarized and reported back in groups of four (4) or more to protect the confidentiality of the feedback.

The NEXUS Coaching Certification Program is a training program which is launched concurrently with the planning phase of an organization-wide census.

Major milestones of Coffman Organization projects typically include:

1. **NEXUS Planning and Timeline** - which includes the initial HRIS review and mapping for reports. This step begins with the contract execution and ends with the launch of the survey.
2. **Fielding the Survey** – this phase is the execution of the survey process, which is typically ten (10) days to two (2) weeks. This step ends with the close of the survey.
3. Analysis and Executive Presentation – this step includes the analysis of all client data, the development of the executive presentation and managerial reports. This ends with the delivery of the reports and presentations to the client organization.

4. Presentation and Manager Connection – this step opens the Manager Connection Portal, delivering reports to managers and starts the management discussions with team members.

5. Energy Planning – this step begins as each team collaborates on the actions each person can take to build a more energizing, productive and rewarding workplace.

6. Follow – Up System - Ongoing Manager Development and Engagement Follow-up until the next survey.

Projects include Executive Presentations for the executive team, Manager Reports for groups of 4 or more respondents (Direct Report Groups or Roll-ups) and Personal Insight Reports for every employee completing the survey.

- **NEXUS Census Survey**: Executive Presentations for the executive team for the overall organization and key divisions.
- Personal Insight Reports for every employee who completed the survey.
- Manager Team Reports for every group with 4 or more respondents.
- Special Reports for all departments/roles/groups requested by the client.
- The Manager Connection Site access for managers to retrieve their team reports and Executives to view company results by engagement level, function/group. Manager Connection “drips” to educate and stimulate manager action.
- Energy Plan System to record actions each team committed to and the date of follow-up or completion.

**NEXUS Coaching Certification**:

- Coach Intake Interview to collect coach’s strengths and priorities.
- Webinars to educate coaches on the elements of a successful Engagement Program and their role in the process.
- Learning Checks to certify coach learning and accomplishment of key outcomes.
The Coffman Organization has been providing Integrated Consulting Services to corporate customers since 2006.

The Coffman Organization has been chosen by organizations in financial services, hospitality, healthcare, manufacturing, and distribution primarily because **NEXUS** is the most innovative and impactful engagement measurement and impact tool in the marketplace. Clients want to get their employee data back quickly, in a way that facilitates the usefulness of that information to the organization; they want a process that engages both employees and managers in building an even better place to work. The Coffman Organization possesses deep, recognized experience in the development of engagement measures, manager development, and best practices in management and leadership.
CUSTOMER INFORMATION

1a. TABLE OF AWARDED SPECIAL ITEM NUMBERS:
   Special Item No. 874-1 and 874 -1RC Integrated Consulting Services
   Special Item No. 874-1RC Integrated Consulting Services
   Special Item No. 874-4 and 874-4RC Training Services
   Special Item No. 100 -03 and 100-03 RCancillary Services

1b. IDENTIFICATION OF THE LOWEST PRICED MODEL NUMBER & LOWEST UNIT PRICE – see #28. Labor Costs on page 12

1c. JOB TITLES – LABOR CATEGORIES/DETAILED POSITION DESCRIPTIONS AND FUNCTIONAL RESPONSIBILITIES

<table>
<thead>
<tr>
<th>ITEM</th>
<th>JOB TITLE - LABOR CATEGORY</th>
<th>DESCRIPTION/FUNCTIONAL RESPONSIBILITIES</th>
<th>EXPERIENCE</th>
<th>EDUCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Principal Consultant</td>
<td>Senior subject matter expert responsible for thought leadership, the development of client programs, including project scope, methodology, communication, analysis, education and customization. The Principal Consultant conducts client briefings, executive presentations, manager and leadership development and consultation, assigns staff, assures quality control and that programs will improve organizational performance.</td>
<td>15 years of experience in talent management and engagement consulting, leadership and manager development.</td>
<td>Master’s Degree</td>
</tr>
<tr>
<td>2</td>
<td>Operations Manager</td>
<td>Senior subject matter technical expert responsible for survey customization, deployment, and data management, and reporting for client projects. The Operations Manager creates and manages the project timeline, rollup structures and deliverables, responds to client service requests and provides data and analysis necessary for the client deliverables.</td>
<td>5 years of experience in survey deployment, data analysis and reporting, client service and project management.</td>
<td>Bachelor’s Degree</td>
</tr>
<tr>
<td>3</td>
<td><strong>Chief Science Officer</strong></td>
<td>Senior subject matter expert responsible for thought leadership, and standards development, instrument design, item selection and development, data analysis and benchmarking standards. The Chief Science Officer develops and conducts executive analysis and executive consultations, research inquiries and client impact analysis.</td>
<td>15 years of experience in engagement research and consulting including the design implementation and analysis of engagement and culture data.</td>
<td>Master’s Degree</td>
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<td>---</td>
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</tr>
<tr>
<td>4</td>
<td><strong>VP Business Development</strong></td>
<td>Senior subject matter expert responsible for the development of client programs, new client acquisition and program scope, pricing and initial program design.</td>
<td>10 years of experience in client acquisition and development in the HR arena, including culture and engagement surveys, employee satisfaction and management development solutions.</td>
<td>Bachelor’s Degree</td>
</tr>
<tr>
<td>5</td>
<td><strong>Sr. Program Manager</strong></td>
<td>Senior subject matter expert responsible for client program management, planning and consulting with client decision makers and insuring client satisfaction.</td>
<td>10 years of experience in client management in the HR arena, including culture and engagement surveys, employee satisfaction and management development solutions.</td>
<td>Bachelor’s Degree</td>
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<tr>
<td>6</td>
<td><strong>Communications Editor</strong></td>
<td>Subject matter expert responsible for the development of client communications and materials, customization of deliverables to the client and the administration of the learning systems and materials to clients.</td>
<td>1 year of experience in development of communications.</td>
<td>Bachelor’s Degree</td>
</tr>
<tr>
<td>7</td>
<td><strong>Programming</strong></td>
<td>Senior technical expert responsible for programming survey and reporting, energy planning system and other managerial tools.</td>
<td>3 years of experience in survey and reporting technology.</td>
<td>Associate Degree</td>
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2. **MAXIMUM ORDER:** $1,000,000

3. **MINIMUM ORDER:** $100

4. **GEOGRAPHIC COVERAGE** – Worldwide and all 50 States and territories of United States.

5. **POINTS OF PRODUCTION** – N/A
6. **DISCOUNT FROM LIST PRICES OR STATEMENT OF NET PRICE** - **DISCOUNT FROM LIST PRICES OR STATEMENT OF NET PRICE** –

The government is The Coffman Organization’s Most Favored Customer, as evidenced by the discounts offered through the GSA contract, which are discounted 1.5 to 30% from commercial market prices. The proposed pricing provided herein to GSA, as our MFC, is equal to or lower than any pricing provided to our commercial customers. We shall inform the procurement contracting officer when any sales are made which based on their specific pricing, disturbs the price/discount relationship as outlined in 552-238-75.

7. **QUANTITY DISCOUNTS**- Quantity discounts were awarded in the form of volume pricing for the contract amount. These are:

   - 1% discount for orders over $150,000.
   - 2% discount for orders over $300,000.
   - 3% discount for orders over $650,000.

8. **PROMPT PAYMENT TERMS** – Net 30 days

9a. **NOTIFICATION WHETHER GOVERNMENT PURCHASE CARDS ARE ACCEPTED AT OR BELOW THE MICRO-PURCHASE THRESHOLD.** YES

9b. **NOTIFICATION OF WHETHER GOVERNMENT PURCHASE CARDS ARE ACCEPTED OR NOT ACCEPTED ABOVE THE MICRO-PURCHASE THRESHOLD.** YES

10. **FOREIGN ITEMS (LIST BY COUNTY OF ORIGIN)** - N/A

11a. **TIME OF DELIVERY (NUMBER OF DAYS)** - N/A

11b. **EXPEDITED DELIVERY** - N/A

11c. **OVERNIGHT AND 2-DAY DELIVERY** - N/A

11d. **URGENT REQUIREMENTS** - N/A

12. **F.O.B. POINTS** - N/A

13a. **ORDERING AND SALES LOCATIONS:**
    9457 S University Blvd. Suite 640,
    Denver CO 80126

13b. **ORDERING PROCEDURES:**
Orders may be transmitted via email to Kathie_sorensen@coffmanorganization.com or faxed to 888-999-8940. The Coffman Organization will follow-up with all inquiries (email, phone or fax) within 24 hours to confirm receipt, clarify and schedule services.

14. PAYMENT REMIT ADDRESS:
   9457 S University Blvd. Suite 640,
   Denver CO 80126

15. WARRANTY PROVISION – Contractor warrants and implies that items delivered are merchantable and fit for use for the particular purpose described in the contract.

16. EXPORT PACKING CHARGES - N/A

17. TERMS AND CONDITIONS OF GOVERNMENT PURCHASE CARD ACCEPTANCE (Any THRESHOLDS ABOVE THE MICRO-PURCHASE LEVEL) – Contact Contractor.

18. TERMS & CONDITIONS OF RENTAL, MAINTENANCE AND REPAIR - N/A

19. TERMS & CONDITIONS OF INSTALLATION - N/A

20. TERMS & CONDITIONS OF REPAIR PARTS - N/A

21. LIST OF SERVICE AND DISTRIBUTION POINTS - N/A

22. LIST OF PARTICIPATING DEALERS - N/A

23. PREVENTIVE MAINTENANCE - N/A

24a. SPECIAL ATTRIBUTES - N/A

24b. SECTION 508 COMPLIANCE INFORMATION – N/A

25. DUNS Number: 030701132

26. SYSTEM FOR AWARD MANAGEMENT (SAM) – The Coffman Organization, Inc. is registered in the System for Award Management.

27. SERVICE CONTRACT ACT

The Service Contract Act (SCA) is applicable to this contract and as it applies to the entire 00CORP The Professional Services Schedule and all services provided. While no specific labor categories have been identified as being subject to SCA due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29CRF 5413.300), this contract still maintains the provisions and protections for SCA eligible labor categories. If and/or when the Contractor adds
SCA labor categories / employees to the contract through the modification process, the Contractor must inform the Contracting Officer and establish a SCA matrix identifying the GSA labor category titles, the occupational code, SCA labor category titles and applicable wage determination (WD) number. Failure to do so may result in cancellation of the contract.

28. PROFESSIONAL SERVICE SCHEDULE LABOR RATES

The following reflects specific roles and approved pricing which reflects MFC government discounts of 1.5 to 30% in comparison to commercial business pricing. These prices include the .75 percent Industrial Funding Fee.

<table>
<thead>
<tr>
<th>Item</th>
<th>SIN</th>
<th>Awarded Labor Category</th>
<th>Site</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
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<td>1</td>
<td>874 1, 874-4, 874-4RC</td>
<td>Principal Consultant</td>
<td>Both</td>
<td>$352.64</td>
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<td>Operations Manager</td>
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<td>874 1, 874-4, 874-4RC</td>
<td>Chief Science Officer</td>
<td>Both</td>
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<td>874 1, 874-4, 874-4RC</td>
<td>VP Business Development</td>
<td>Both</td>
<td>$402.93</td>
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<td>874 1, 874-4, 874-4RC</td>
<td>Sr. Program Manager</td>
<td>Both</td>
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<td>874 1, 874-4, 874-4RC</td>
<td>Communications Editor</td>
<td>Both</td>
<td>$229.25</td>
<td>$229.25</td>
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<td>Programming</td>
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TRAINING COURSE DESCRIPTION SINS 874-4 AND 874-4RC

<table>
<thead>
<tr>
<th>TITLE OF COURSE</th>
<th>NEXUS Engagement Coaching Certification</th>
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<tbody>
<tr>
<td>LENGTH OF COURSE (HRS OR DAYS)</td>
<td>4 Sessions/1.25 hours per webinar session</td>
</tr>
<tr>
<td>TOTAL PRICE OF COURSE (including IFF)</td>
<td>$21914.36</td>
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<tr>
<td>MINIMUM NUMBER OF PARTICIPANTS</td>
<td>10</td>
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<tr>
<td>MAXIMUM NUMBER OF PARTICIPANTS</td>
<td>50</td>
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<tr>
<td>PRICE PER EACH ADDITIONAL PARTICIPANT IN EXCESS OF THE MAXIMUM (IF APPLICABLE)</td>
<td>$428.21 each</td>
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DESCRIPTION OF COURSE: Web-based with recorded sessions Or Optional On-site (consultant travel additional and in accordance with government per diems).

OPTIONS: In concert with engagement survey, sessions are deployed with survey planning and execution to increase response rates, cultural alignment and higher levels of satisfaction and engagement.

Note: If the NEXUS Experience Survey is used, the consulting required to align the coaches program with the survey timeline and organizational goals is included; if another survey is employed, the timeline and emphasis will be adjusted in consultation with the client and additional professional services may be added.

Each topic is delivered “just-in-time” to enhance the organization’s engagement measurement and follow-up action. Coaches are engaged in the entire engagement process, from planning to execution and energy/action planning to build energy and positive action from the survey process.

All sessions include research based concepts from highly engaged teams, organizations and managers. The sessions also include a “Logistics” dimensions which ties to the engagement measurement process and an “Action” sessions which defines the roles/actions coaches are expected to take/support. Note that the Coaches actions are not time consuming, but are touch points that act as focal points for generating positive/productive energy from employees and managers.

The Coach Certification is intended for HR professionals, Managers and Employees interested in playing a stronger role in building and sustaining a high performance culture that brings out the best in each person.

SESSIONS:
  I. Introducing the NEXUS Coach Certification Process
  II. NEXUS Deep Dive
  III. NEXUS Results & Team Discussions
  IV. The NEXUS Promise: Maximizing Impact and Energy
SESSION DETAILS:

I. **Introducing the NEXUS Coach Certification Process**
   **CONCEPTS:**
   - Culture as competitive advantage
   - Why engagement matters
   - Engagement as energy in the MicroCulture
   - The new role of managers in high performance, high-energy culture
   **LOGISTICS:**
   - NEXUS Experience - planning & reporting
   - Communication process & logistics
   **ACTION:**
   - The coach’s role & expectations in survey planning & communications

II. **NEXUS Deep Dive**
   **CONCEPTS:**
   - NEXUS is the perfect intersection of culture and business
   - Measuring engagement: the EE2.0 core items
   - Understanding the items, their implications & connections to performance
   **LOGISTICS:**
   - NEXUS Experience – survey launch
   - Building excitement, expectations and participation
   **ACTION:**
   - The coach’s role & expectations in increasing survey participation

III. **NEXUS Results & Team Discussions**
   **CONCEPTS:**
   - The NEXUS team report
   - Team dynamics and insights
   - Company-wide themes and insights - leadership’s role
   - How and why people disconnect from culture
   - Helping managers lead their team discussions
   - Frequently asked questions & the best practices
   - Resources and tools for supporting manager development
   **LOGISTICS:**
   - Presenting and leveraging results
   - Encouraging manager action and team ownership
   **ACTION:**
   - The coach’s role & expectations in the survey results roll-out

IV. **The NEXUS Promise: Maximizing Impact and Energy**
   **CONCEPTS:**
   - Connecting points - why what you connect about really matters.
   - Why talent –why strengths coaching is the only coaching for better performance.
   - Why it is more important to be “interested” than “interesting”
Instigating leader to manager follow-up
Manager and team energy plans
Manager needs

LOGISTICS:
The NEXUS Experience post-survey engaging conversation
Selecting Manager Connection drips – topics and champions
Coaching managers for maximum impact

ACTION:
The coach’s role & expectations in keeping the survey promise

OUTCOME: Coaches learn both the why and how of the engagement process and become competent in both the items asked and the behaviors that best support the engagement and energy levels of employees. They function to support the entire Engagement Program, from the first communications through the delivery of results. They connect with employees to encourage participation in the survey, answer questions, support managers and serve as “ambassadors” or “advisors” of the process. This results in higher response rates (88% or higher) and better follow-up on the survey results, which increases engagement in the subsequent survey.
TRAINING COURSE DESCRIPTION SINS 874-4 AND 874-4RC

<table>
<thead>
<tr>
<th>TITLE OF COURSE:</th>
<th>Principles of Great Managers: #1 Belief in Talent</th>
</tr>
</thead>
<tbody>
<tr>
<td>LENGTH OF COURSE (HRS OR DAYS):</td>
<td>1.25 Hours per Webinar</td>
</tr>
<tr>
<td>TOTAL PRICE OF COURSE: (including IFF)</td>
<td>$6574.31</td>
</tr>
<tr>
<td>MINIMUM NUMBER OF PARTICIPANTS:</td>
<td>20</td>
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<tr>
<td>MAXIMUM NUMBER OF PARTICIPANTS:</td>
<td>50</td>
</tr>
<tr>
<td>PRICE PER EACH ADDITIONAL PARTICIPANT IN EXCESS OF THE MAXIMUM (IF APPLICABLE):</td>
<td>$130.98</td>
</tr>
</tbody>
</table>

DESCRIPTION:

Based on research with outstanding leaders, managers, organization and teams, this session focuses on the principle: Belief in Talent. What creates outstanding performance? Skills? Knowledge or Talent?

Talent is the capacity for a near perfect performance. Understanding what talents are, how they develop and lead to excellence is the key to helping people move from their strengths.

Great manager define talent as “a recurring pattern of thought, feeling, or behavior that can be productively applied.”

Embracing this principle is central to how we lead and manage people. Great Managers discover the strengths within the people they lead and manage and that makes a difference in engagement, satisfaction and performance.
TRAINING COURSE DESCRIPTION SINS 874-4 AND 874-4RC

<table>
<thead>
<tr>
<th>TITLE OF COURSE:</th>
<th>Principles of Great Managers: #2 Study Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>LENGTH OF COURSE (HRS OR DAYS):</td>
<td>1.25 Hours per Webinar</td>
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<tr>
<td>TOTAL PRICE OF COURSE: (including IFF)</td>
<td>$6574.31</td>
</tr>
<tr>
<td>MINIMUM NUMBER OF PARTICIPANTS:</td>
<td>20</td>
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<tr>
<td>MAXIMUM NUMBER OF PARTICIPANTS:</td>
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<tr>
<td>PRICE PER EACH ADDITIONAL PARTICIPANT IN EXCESS OF THE MAXIMUM (IF APPLICABLE):</td>
<td>$130.98</td>
</tr>
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</table>

DESCRIPTION:

Based on research with outstanding leaders, managers, organization and teams, this session focuses on the principle: Study Success.

But in the world of management and leadership, much of what we know comes from studies of all managers.

When you study average, you emerge with average: the best of the worst and the worst of the best!

What are the benefits?

- We leverage the talents that lead to success.
- “Fast track” individual development.
- Get higher levels of satisfaction and performance.
- Eliminate “noise” and focus on the right things.
### TRAINING COURSE DESCRIPTION SINS 874-4 AND 874-4RC

**TITLE OF COURSE:** Principles of Great Managers: Complementary Partnership #3  
**LENGTH OF COURSE (HRS OR DAYS):** 1.25 Hours per Webinar  
**TOTAL PRICE OF COURSE: (including IFF)** $6,574.31  
**MINIMUM NUMBER OF PARTICIPANTS:** 20  
**MAXIMUM NUMBER OF PARTICIPANTS:** 50  
**PRICE PER EACH ADDITIONAL PARTICIPANT IN EXCESS OF THE MAXIMUM (IF APPLICABLE):** $130.98

### DESCRIPTION:

Based on research with outstanding leaders, managers, organization and teams, this session focuses on the principle: Complementary Partnership.

#### Complementary Partnership

<table>
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<tr>
<th>Equation</th>
<th>Description</th>
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<tbody>
<tr>
<td>1 + 1 = 2</td>
<td>Conventional Wisdom</td>
<td>• What is your highest and best contribution?</td>
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<tr>
<td>1 + 1 = .75</td>
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<td>• What talents do you lead with?</td>
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<tr>
<td>1 + 1 = 11</td>
<td>Complementary Partnership</td>
<td>• What accompanies your “melody?”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• What needs to be “partnered around” to make you even more effective?</td>
</tr>
</tbody>
</table>

Often the people who annoy us – are those we most need to be successful!

Our themes can “blind us” to reality.

Partnerships bring a diversity of strengths and perspective.
TRAINING COURSE DESCRIPTION SINS 874-4 AND 874-4RC

TITLE OF COURSE: Principles of Great Managers: Move From Strength #4

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<thead>
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<td>PRICE PER EACH ADDITIONAL PARTICIPANT IN EXCESS OF THE MAXIMUM (IF APPLICABLE):</td>
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DESCRIPTION:
Based on research with outstanding leaders, managers, organization and teams, this session focuses on the principle: Move From Strength.

Move From Strength means:

- A spotlight on success
- Openness, receptivity, learning
- Active connection – cooperation
- Mention of surprise, curiosity or excitement
- Notice of facilitating action or movement
- Toward a positive outcome
- Efforts to reframe issues in positive terms
- Envisioned ideal

---

When it comes to Human Potential

- Focusing on the negative minimizes talent
- It doesn’t help us build strong and diverse teams

“Never is too strong a word when their strengths are clearly in mind.”

“Never is too weak a word when their weaknesses are clearly in mind.”

People can’t be “fixed” because they aren’t broken

---

Culture is Built on Touchpoints

- We get what we focus on
- Our language shapes our culture

---

The Language of Human Deficit

- Lazy
- Depressed
- Paranoid
- Neurotic
- Extremely Controlling

She’s always “down.”

"Paranoid?"

He’s a control freak.

Minimizes the person = Builds a culture of victims.
TRAINING COURSE DESCRIPTION SINS 874-4 AND 874-4RC

TITLE OF COURSE: Principles of Great Managers: Enable Decisions Close to the Action #5

<table>
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<td>MAXIMUM NUMBER OF PARTICIPANTS:</td>
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<td>PRICE PER EACH ADDITIONAL PARTICIPANT IN EXCESS OF THE MAXIMUM (IF APPLICABLE):</td>
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DESCRIPTION:
Based on research with outstanding leaders, managers, organization and teams, this session focuses on the principle: Enable Decisions Close to the Action.

- What’s the first thing you do when faced with a decision?
  - How do you proceed?
  - What strengths do these tendencies reflect?
- How has someone encouraged you to make a decision that changed your career and life?
- How do our company philosophies impact the decision making process?
- Thinking practically, what does “close to the action decision making” mean to you in your role?
- How does being a strengths-based organization affect the way we make decisions?
  - What are some things that you should always or never be allowed to make decisions about?
  - What decisions would you like to see your team make for themselves? How can you encourage them?
TRAINING COURSE DESCRIPTION SINS 874-4 AND 874-4RC

TITLE OF COURSE: Principles of Great Managers: Systems Improve Performance # 6

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<td>PRICE PER EACH ADDITIONAL PARTICIPANT IN EXCESS OF THE MAXIMUM (IF APPLICABLE):</td>
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DESCRIPTION:
Based on research with outstanding leaders, managers, organization and teams, this session focuses on the principle: Systems Improve Performance.

- How can we ensure that systems improve performance vs. impede performance?
- What are the leading indicators you trust most and why?
- How do they influence your thinking and action?
- Systems thinking is a valuable talent. Who on your team brings real clarity and insight to work processes or work flow?
- How do you involve them?
- If you could, what would you most like to measure?
- If you could what would you most like to systematize?
## ATTACHMENT A: 874-4 PRICING TABLE

<table>
<thead>
<tr>
<th>SIN</th>
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TITLE OF COURSE: Keynote Presentations

<table>
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<td>Format: PRESENTATION ONLY (including IFF)</td>
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Participants: Keynotes priced by presentation – Minimum 1 participant; no Maximum.

DESCRIPTION OF COURSE:

Curt Coffman virtually created the engagement movement and continues to pioneer the way organizations think about their culture, their managers, and their business results. His mission is to help individuals at all levels of leadership create more engaging and productive workplaces, to secure the loyalty and growth of their customers and business, and to bring out the best in every employee.

Engagement isn’t just about how people feel. Engagement is energy. Energy is something you can measure, something you can create. And engagement should revolve around the employee as an individual contributor who isn’t just part of the problem but a powerful partner in the solution.

All content comes from the study of (literally) millions of employees, thousands of managers and leaders, and hundreds of organizations. All research has been focused on studying excellence and what distinguishes the best.

A New York Times Bestselling author, researcher, business scientist, and consultant, Curt Coffman has been at the forefront of employee engagement for more than thirty years as an expert in the science of high performance cultures.

As the Global Practice Leader for employee and customer engagement at Gallup for twenty-two years, and now as Chief Science Officer at The Coffman Organization, Coffman has studied hundreds of organizations and millions of their employees and customers.

His international bestseller, First, Break all the Rules: What the World’s Greatest Managers do Differently (coauthored with Marcus Buckingham), launched a new era in employee and manager development. The books that followed, Follow This Path: How the World’s Greatest Organizations Drive Growth by Unleashing Human Potential, and Culture Eats Strategy for Lunch: The Secret of Extraordinary Results (coauthored with Dr. Kathie Sorensen), provide practical and unconventional management insight for individuals and organizations.

An international leader in the world of management and engagement consulting, Mr. Coffman’s work has been translated into over 40 languages. His research and writings have appeared in

An insightful and engaging speaker, Mr. Coffman has presented to thousands of groups on creating great cultures that impact individuals and their families, drive organizational growth, and create engaged customers.

**KEYNOTE FORMATS:**
The Keynote Presentations are large learning events focused on Culture, Management, Leadership, etc.

Topics are customized to the audience/focus. A consultation is built into the cost of the Keynote. The topics below are some specific examples:

**FIRST, BREAK ALL THE RULES**  
What the World’s Greatest Managers Do Differently

We studied 250,000+ managers and discovered a few things about what distinguishes the best from the rest. Great managers break the rules of conventional wisdom. They select people based on talent rather than experience, skills, and knowledge. They focus their people through clarity of desired outcomes rather than steps and processes. They motivate people by discovering strengths rather than fixing weaknesses, and they create growth by finding the right fit between a person’s talents and a role’s demands. Great managers get really close to people and recognize that relationship drives performance, and they play favorites, spending most of their time with their most productive people.

**CULTURE EATS STRATEGY FOR LUNCH**  
Culture as Competitive Advantage

Top organizational cultures in every size and industry, from Google, Zappos, and Nordstrom, to the local grocery store, restaurant, or coffee shop, share these key characteristics: They get specific about the practices, rituals, and quirks that distinguish their culture. They have sticky values that drive innovation and frontline decision-making. They examine and move from excellence rather than average. They define their religion and their science and the relationship between the two, and they see how each individual’s contributions attract and keep customers.

**CREATING A PLACE WHERE PEOPLE JUST CAN’T WAIT TO COME TO WORK EVERY DAY**
From the study of 1 million + employees and what attracts, retains, and energizes them

Having a clear focus, great manager, proper talent, and quality relationships are the keys to personal and professional success. Individuals want to contribute to a team that has high standards and expectations that enable success they never thought possible. They constantly raise the bar for
themselves and others by tracking personal bests and encouraging pressure to perform from team members. **People leave managers**, not companies. Great managers, therefore, are the foundation of great organizations. **How we select, focus, and recognize managers can be the best predictor of business results.** Great people managers have strange practices: playing favorites among their direct reports, getting very close to their employees, firing people quickly, and customizing roles to fit the unique needs and talents of their team.

**SIN 100-03: ANCILLARY SUPPLIES & SERVICES**

**BOOKS**

*CULTURE EATS STRATEGY FOR LUNCH* The Secret to Extraordinary Results  
Authors: Curt Coffman and Dr. Kathie Sorensen

Inspired by a quip attributed to management guru, Peter Drucker, “*Culture Eats Strategy for Breakfast,*” this book is a crash course for turning culture into competitive advantage. Culture isn’t the enemy of strategy and performance, but an equal player in the game, not to be underestimated or overlooked.

*Culture Eats Strategy for Lunch* is for everyone trying to work within a culture to make something happen. Each of us moves daily through a myriad of cultures, from neighborhood, to organization, school and church. And it is our connection to those cultures, which either inspires the best within us or reduces us to average. The authors teach you how to use the force of culture to make your work environment what you’ve always wanted it to be: a healthy place with inspired people and boundless organic growth.

This book follows in the tradition of Coffman’s first bestseller, *First, Break All the Rules*, in that the secrets come from the study of high performing organizations, where culture drives results. Effective culture is like a six lane suspension bridge, and poor culture is like a swinging bridge strung together with fraying rope.

The practices of extraordinary cultures and their uninspiring counterparts emerged through decades of work and research. The qualities that make a culture excellent are about 80 percent generic and 20 percent unique. Competitive advantage results from the 20 percent that slam-dunks the brand promise to the customer.

Coffman and Sorensen, seasoned, highly experienced researchers and consultants, usher in a new perspective which challenges some bedrock, but time-worn organizational practices, from the “little boxes” on the organizational chart to the employee survey and the bureaucratic veneer. Some of our practices are obsolete, but more to the point, our methods no longer match to goals we need to achieve.

*Why buy the piano when what you want most is to hear the music?*
## PRICING BY FORMAT

**Attachment B**

<table>
<thead>
<tr>
<th>Formats Available</th>
<th>BRAND NAME</th>
<th>UNIT OF ISSUE</th>
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<td><strong>CULTURE EATS STRATEGY FOR LUNCH - Hardback</strong></td>
<td>COFFMAN ORGANIZATION</td>
<td>Each</td>
<td>978-0-615-57796-8</td>
<td>17.12**</td>
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<td>Each</td>
<td>978-1-940497-03-7</td>
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** Excludes shipping charges. Postage for book delivery is charged back to the customer using USPS standard rates by service requested (media rate, priority mail, or standard first class) or FED EX or UPS as requested by the customer. These hard costs are calculated when orders are received.

*Delivered as a downloadable link which can be used for up to 3 devices per version ordered.
SIN 100-03: ANCILLARY SUPPLIES & SERVICES

Coach Connection Resources for the NEXUS Coaching Certification Program

Coaches have access to the Coach Connection site to obtain materials and resources for their Coach Certification Program.

The site includes information about the survey process, resources to understand the science of engagement and access to webinars for viewing or re-viewing.

Each coach is given a log-in to the site which includes access to the Coaching Assessment and all resources.

<table>
<thead>
<tr>
<th>Attachment B - ANCILLARY SUPPLIES/SERVICES (SINS 100-03) Coach Connection Resource site – for the NEXUS Coach Certification Program – 12 month access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coach Connection Resource site – for the NEXUS Coach Certification Program – 12 month access</td>
</tr>
<tr>
<td>Coach Connection Resource site for the NEXUs Coach Certification Program; Per Program, up to 50 enrolled coaches.</td>
</tr>
<tr>
<td>Coach Connection Resource site for the NEXUs Coach Certification Program; Per Coach Enrolled, 50+</td>
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</tbody>
</table>

SIN 100-03: ANCILLARY SUPPLIES & SERVICES

Manager Connection Resources for the NEXUS Experience Engagement Program

Managers have access to the Manager Connection site to obtain materials and resources for following up on the survey results with their team and in taking action to further engage employees in creating an even better place to work.

The Manager Connection site includes information about the survey process, resources to understand the science of engagement and access to webinars for viewing or re-viewing.

Each manager is given a log-in to the site which includes access to their survey results and results downstream (i.e., reporting up through the manager). The roles and permissions are established per client specifications during the survey planning phase.
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<thead>
<tr>
<th>ANCILLARY SUPPLIES/SERVICES (SINS 100-30) Manager Connection Resource site for the NEXUS Experience</th>
<th>UNIT OF ISSUE</th>
<th>GSA PRICE (Includes IFF)</th>
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<tbody>
<tr>
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SIN 100-03: ANCILLARY SUPPLIES & SERVICES

Web Based Surveys

Web based surveys provide an efficient and effective way to measure engagement, employee satisfaction, confidence in leadership and other attitudes important to high performance culture and employee retention and growth. Surveys can be employed either as a full census, a pulse check, or team building/manager development service.

The Coffman Organization offers specifically developed and branded surveys (NEXUS Experience, NEXUS Exit, CultureFit, Employee Engagement 2.0) or customized survey vehicles.
## ANCILLARY SUPPLIES/SERVICES (SINS 100-30)

### Web Based Surveys

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