Multiple Award Schedule

Contract Number: GS-00F-278DA

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at http://www.gsa.gov/schedules-ordering

Contract Period: 09/15/2016 – 09/14/2021

Contractor: SHACKLETON GROUP, INC
777 S WADSWORTH BLVD #2-209,
Lakewood, CO 80226 4334

Business Size: Small, Disadvantaged, Veteran Owned, Service-Disabled Business

In accordance with 13 C.F.R. 121.404, the Contractor is ineligible to participate in any RFQ that is set aside for small business where the subject contract’s awarded size status for the preponderance NAICS designated in the RFQ is “other than small”.

Telephone: (303)482-2370
FAX Number: (530) 482-2376
Web Site: www.shkgrp.com
E-mail: egillcrist@shkgrp.com
Contract Administration: Edward Gillcrist

CUSTOMER INFORMATION:

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

<table>
<thead>
<tr>
<th>MAS SIN</th>
<th>SIN Title</th>
<th>SIN Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>541611</td>
<td>Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and</td>
<td>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</td>
</tr>
</tbody>
</table>
Project Management Services

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.

611430
Professional and Management Development Training

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.

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.

1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract. This price is the Government price based on a unit of one, exclusive of any quantity/dollar volume, prompt payment, or any other concession affecting price. Those contracts that have unit prices based on the geographic location of the customer, should show the range of the lowest price, and cite the areas to which the prices apply.

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.
2. **Maximum Order:** $1,000,000.00

3. **Minimum Order:** $100.00

4. **Geographic Coverage (delivery Area):** Domestic only

5. **Point(s) of production (city, county, and state or foreign country):** Same as company address

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

7. **Quantity discounts:** 2% off each task order exceeding $150,000.00

8. **Prompt payment terms:** 1% - 10 days, Net 30 days

9a. **Notification that Government purchase cards are accepted up to the micro-purchase threshold:** Yes

9b. **Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold:** will not accept over $2,500

10. **Foreign items (list items by country of origin):** None

11a. **Time of Delivery (Contractor insert number of days):** Specified on the Task Order

11b. **Expedited Delivery.** The Contractor will insert the sentence “Items available for expedited delivery are noted in this price list.” under this heading. The Contractor may use a symbol of its choosing to highlight items in its price list that have expedited delivery: Contact Contractor

11c. **Overnight and 2-day delivery.** The Contractor will indicate whether overnight and 2-day delivery are available. Also, the Contractor will indicate that the schedule customer may contact the Contractor for rates for overnight and 2-day delivery: Contact Contractor

11d. **Urgent Requirements.** The Contractor will note in its price list the “Urgent Requirements” clause of its contract and advise agencies that they can also contact the Contractor’s representative to effect a faster delivery: Contact Contractor

12. **F.O.B Points(s):** Destination

13a. **Ordering Address(es):** Same as Contractor
13b. Ordering procedures: For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA’s), and a sample BPA can be found at the GSA/FSS Schedule homepage (fss.gsa.gov/schedules).

14. Payment address(es): Same as company address

15. Warranty provision: Contractor’s standard commercial warranty.

16. Export Packing Charges (if applicable): N/A

17. Terms and conditions of Government purchase card acceptance (any thresholds above the micro-purchase level): Contact Contractor

18. Terms and conditions of rental, maintenance, and repair (if applicable): N/A

19. Terms and conditions of installation (if applicable): N/A

20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable): N/A

20a. Terms and conditions for any other services (if applicable): N/A

21. List of service and distribution points (if applicable): N/A

22. List of participating dealers (if applicable): N/A

23. Preventive maintenance (if applicable): N/A

24a. Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants: N/A

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. contactor’s website or other location.) The EIT standards can be found at: www.Section508.gov/.

25. Data Universal Numbering System (DUNS) number: 623824849

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

27. Final Pricing:
The rates shown below include the Industrial Funding Fee (IFF) of 0.75%.
### Awarded Labor Category:

<table>
<thead>
<tr>
<th>SIN Awarded</th>
<th>Service Awarded</th>
<th>Minimum Education / Certification Level</th>
<th>Minimum Years of Experience (cannot be a range)</th>
<th>Contractor or Customer Facility or Both</th>
<th>Unit of Issue (e.g. Hour, Task, Sq Ft)</th>
<th>Price Awarded (including IFF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>541611</td>
<td>Performance Consultant / Sr. Analyst</td>
<td>Bachelors</td>
<td>7</td>
<td>Customer Facility</td>
<td>hour</td>
<td>$141.06</td>
</tr>
</tbody>
</table>

### Awarded Training Classes:

<table>
<thead>
<tr>
<th>SIN Awarded</th>
<th>Course Title</th>
<th>Course Length</th>
<th>Minimum Participants</th>
<th>Maximum Participants</th>
<th>Contractor or Customer Facility or Both</th>
<th>Unit of Issue (e.g. Per Person, Per Course)</th>
<th>Price Awarded (including IFF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>611430</td>
<td>Organizational Leadership: A Practical Guide to Corporate Maneuver Warfare (OLC Delivery)</td>
<td>15 hours</td>
<td>1</td>
<td>22</td>
<td>Both</td>
<td>Per Course</td>
<td>$20,151.13</td>
</tr>
<tr>
<td>611430</td>
<td>Leadership Advocacy Workshop – (LAW)</td>
<td>2 hours</td>
<td>1</td>
<td>22</td>
<td>Both</td>
<td>Per Course</td>
<td>$4,171.47</td>
</tr>
<tr>
<td>611430</td>
<td>Facilitation Skills for Leaders (FSFL)</td>
<td>4.5 hours</td>
<td>1</td>
<td>22</td>
<td>Both</td>
<td>Per Course</td>
<td>$5,239.50</td>
</tr>
<tr>
<td>611430</td>
<td>Ethics in Good Leadership (EIGL)</td>
<td>6 hours</td>
<td>1</td>
<td>22</td>
<td>Both</td>
<td>Per Course</td>
<td>$13,098.74</td>
</tr>
</tbody>
</table>

**Service Contract Act:** The Service Contract Act (SCA) is applicable to this contract as it applies to the entire Professional Services Schedule (PSS) 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 29 CRF 541.300), 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 the applicable WD number. Failure to do so may result in cancellation of the contract.
Labor Description

Position: Performance Consultant / Sr. Analyst

Years of Experience: 7 years

Years Education: Bachelor Degree plus 7 years Organizational development or Change Management experience

Responsibilities: Requires a broad range of consulting and facilitation capabilities supporting the development and implementation of goals and strategies for creating and sustaining a high performing organization. Consultants will need a solid grasp of organizational development principles required to guide organizations, departments, and teams through the full spectrum of performance starting with the fundamentals. Consultants must have the experience base, knowledge, and ability to assimilate Shackleton Group developed models. Critical skills include rapid assessment of organizational dynamics, along with developing recommendations, models, and tools to meet the client’s needs. Consultants must also be able to integrate into client environments and facilitate the organization through the creation of high performance. Integrity and professionalism are paramount. Consultants normally work from home and travel to client workspaces or to Corporate Headquarters when required.

Provide consulting and facilitation services to clients relating to the development of their organization. Duties include but are not limited to:

- The ability to conduct organizational assessments and analysis
- Facilitation, development, analysis, presentation, and submission of survey results
- Facilitation, capture, and presentation of organizational strategy, structure, and training
- Facilitation, capture and presentation of all supporting elements of an organization (i.e. process mapping, communications and structure plans, charters, iQMSLs, etc.)
- Facilitation, capture and presentation of individual and team development plans
- Facilitation and delivery of classes, training, and presentations
- Maintains and updates knowledge of: change management theory, principles, and practices; management and leadership approaches; and instructional design and delivery techniques in order to develop personal areas for improvement and also to make recommendations to assist client learning

Other qualifications:

- Working knowledge of:
  - O.D. theories, principles, and methods; organizational analysis and change management skills
  - Training and development needs analyses, program development and delivery
  - Microsoft Office suite of products
- Crucial experience requirements:
  - Leadership, issue mitigation, and influence skills paramount
  - Facilitation skills in multiple venues
  - Written, verbal and interpersonal communication skills
  - Process mapping, process improvement and assessment
Course Descriptions

1. **Organizational Leadership: A Practical Guide to Corporate Maneuver Warfare**

   **Overview**
   Designed and developed by a core team of five former Marine Officers with extensive leadership experience in a wide variety of environments and circumstances, this course focuses on fine-tuning those elements of leadership which, when learned and applied effectively, can arm leaders with game-changing tools and skills for themselves, their people and their organization.

   Critical to development of the concepts in this course was our network of corporate executives and leaders, captains of industry, government program managers, Olympic coaches, military leaders and business consultants that the team reached out to for insights and feedback. Woven throughout the fabric of these lessons are our philosophy of Corporate Maneuver Warfare and the aspects of leadership that those experts believed are essential to the success of any organization.

   **Course Construct**
   The course is comprised of 15 lessons, totaling 15 hours of highly interactive instruction. It is organized into 5 Modules as described below, and can be delivered to suit the client’s scheduling needs; either two full days, or four half days. Each lesson is designed to elicit the experiences of the participants and instructors alike through participation in activities focused on actual, relevant leadership circumstances. Associated materials are provided to help guide participants through the course, and include tools, activities, and additional reading that can be used as references once the course is complete.

   Using a progressive approach to the concepts addressed, participants begin by establishing a baseline on the fundamental concept of leadership, progress to the individual leader, and then to being a leader within an organization. Finally, the course wraps up with in-depth consideration of how they will exercise authority by applying what they have learned as they begin or return to their role as a leader.

   **Module One – Course Introduction (0.5 hr)**
   An introduction to the course that generates enthusiasm for improving an organization by optimizing leadership abilities. This module introduces participants to a unique and exciting approach to leadership development and helps set the context and expectations for the participants and the concepts covered.

   **Module Two – The Concept of Leadership (3.5)**
   The cornerstone for the course, this module immediately engages participants by establishing the basic concept of leadership and ensures alignment by helping differentiate leadership from organizational and operational management. This module also begins to focus the participants on the importance as a leader of recognizing both their own behavioral styles and that of their people.
Module Three – You as a Leader (3.5 hrs)

Building off of the previous module, participants identify specific areas of focus at their current experience level that can accelerate their own individual development and growth as leaders. This module explores what it means to be a “good leader,” recognizing the impact leaders have when they communicate, and setting and managing expectations for their team, their peers, and their superiors.

Module Four – Leading within an Organization (4.5 hrs)

This module introduces the participants to their unique role as a leader in the development of organizational strategy, establishing the structure required to support that strategy, and developing the people and resources required to execute the structure. Module Four closes with the most dynamic aspect of leading within an organization: the constant need and leadership skills necessary to maintain organizational balance between strategy, structure, and people to ensure the organization realizes its desired results.

Module Five – Application of Leadership (3.0 hrs)

In this final module some unique qualities and basic tenets of operations from the United States Marine Corps are offered as possibilities for increasing the influence and effectiveness of leadership in the participant’s own environment. Individual and group discussions and activities will require in-depth consideration of how participants will apply what they have learned in this course. Finally, a facilitated review of the course is conducted that addresses the culmination of what they have learned in the single principle of how they will exercise authority after completing the course.

2. Leadership Advocacy Workshop (2-hour workshop)

A workshop for executive leaders in the organization. It briefly addresses the concepts covered in the OLC to familiarize executives with what their team members are experiencing (or will experience) in the course. An interactive discussion follows with executive leaders focused on how to best advocate for those tenets taught in the OLC in order to help cultivate a leadership culture within their organization. The workshop offers insights into effective advocacy methods for following up with team members who have taken the OLC. Executive leaders should attend this workshop prior to their people taking the OLC so they are immediately prepared to respond with advocacy when team members complete the course. The workshop material product contains 1 module associated lessons formatted and designed for instructors to replicate the workshop material specifically to the guidelines, context and content intended for each lesson and each associated slide. Additionally, the product contains extensive tools, templates, and exercise/activity guidelines to ensure the desired workshop outcomes are achieved.
3. **Facilitation Skills for Leaders**

**Overview**
This workshop focuses on basic facilitation skills for leaders. When learned and applied effectively, these skills can enable leaders to get the most out of any group who are meeting with a common purpose, whether it involves making a decision, solving a problem, or simply exchanging ideas and information. The workshop does not cover *everything* facilitation, but rather focuses on those concepts and skills that are simple enough to understand and employ, and still have a significant, positive and immediate impact on a session’s outcome through the level of collaboration and synergy with which groups and teams conduct themselves.

**Purpose**
To introduce leaders to fundamental facilitation skills that enable effective collaboration to get the most out of a group.

**Objectives**
- Understand the concept of facilitation and its value to an organization
- Introduce and practice fundamental facilitation skills
- Take away some facilitation concepts that can immediately be applied in your organization

**Workshop Construct**
This workshop progressively builds through 4 lessons, in 4 hours of classroom work, and culminates with an opportunity to apply the concepts discussed by practicing facilitation skills in a small group environment. The four lessons are: Basic Definition of Facilitation, Introduction to Fundamentals, Application of Fundamentals, and Introduction to Other Resources.

**Participation**
A successful outcome and return on investment from this workshop, for both the organization and the participants, are predicated on the following: Participants must understand that the true impact and value of this workshop is highly dependent on their focused engagement, participation and interactivity during the lessons and small group activities. Shackleton Group facilitators will guide you through completion of the learning objectives and the course material.

**Participant Guide**
Each participant will receive a Participant Guide (PG) containing all materials required for the course. The PG includes: a complete course description, each lesson’s purpose and learning objectives, in-class activity guides and required materials, links to additional resources, additional reading, and ample space for note taking during class.

**Duration**
4.5 hours
4. **Ethics in Good Leadership**

**Overview**
This workshop focuses on bridging the gap between leadership and ethics to establish a *culture of leadership* that understands what it means to do the right thing. Topics in the workshop include establishing an understanding of the concept of ethics, the challenge of dealing with ethical dilemmas, and an approach for addressing ethical dilemmas. The workshop culminates with the concepts addressed applied in the participant’s environment.

**Purpose**
This workshop focuses on bridging the gap between leadership and ethics to establish a *culture of leadership* that understands what it means to do the right thing.

**Objectives**
- Understand the concept of ethics....it’s about *Doing the Right Thing*
- Understand the concept of a *Culture of Leadership*
- Connect ethics to leadership
- Addressing ethical dilemmas in your environment
- Application of workshop concepts

**Workshop Construct**
This workshop progressively builds off the participants baseline concept of ethics and the concept of a culture of leadership by determining their relationship for leaders to establish and grow an effective ethical culture in their organization. The workshop culminates with an opportunity to apply the concepts discussed in a small group environment by addressing relevant ethical dilemmas that they could reasonably face as leaders in their organization.

**Participation**
A successful outcome and return on investment from this workshop, for both the organization and the participants, are predicated on the following: Participants must understand that the true impact and value of this workshop is highly dependent on their focused engagement, participation and interactivity during the lessons and small group activities. Shackleton Group facilitators will guide them through completion of the learning objectives and the course material.

**Resource Binder**
Each participant will receive a binder containing all materials required for the course which includes: a complete course description, each lesson’s purpose and learning objectives, in-class activity guides and required materials, additional reading, and ample space for note taking during class.

**Duration**
6 hours