

---

**U.S. General Services Administration  
Federal Supply Service  
Authorized Federal Supply Schedule Price List**

**July 6, 2016**

**Contract #GS-02F-0200X**

**The Professional Services Schedule (00CORP)**

**Effective Dates: 6 July 2011 – 5 July 2021**



**Institute for Defense and Business  
1250 Environ Way  
Chapel Hill, North Carolina 27517  
<http://www.idb.org>**

*PROVIDING UNIQUE EDUCATIONAL PROGRAMS FOR EMERGING AND ESTABLISHED LEADERS  
IN LOGISTICS AND TECHNOLOGY, LIFE CYCLE MANAGEMENT, LEADERSHIP AND ORGANIZATIONAL  
TRANSFORMATION, STRATEGIC STUDIES, AS WELL AS STABILIZATION AND ECONOMIC  
RECONSTRUCTION*

---

**Table of Contents**

Contract Data ..... 3  
    Overview..... 5  
    Summary..... 7  
Services Under Special Item Numbers (SINs) Offered by the IDB..... 8  
    SIN 874-1 - Integrated Consulting Services ..... 8  
    SIN 874-4 - Training Services: Instructor Led Training, Web Based Training and Education  
        Courses, Course Development and Test Administration..... 9  
    IDB Educational Offerings ..... 10  
IDB Labor Categories and Pricing ..... 12  
    Labor Category Descriptions ..... 12  
    Labor Category Pricing..... 14

## Contract Data

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

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

**Contract Number:** GS-02F-0200X

**Contractor:** Institute for Defense and Business  
1250 Environ Way  
Chapel Hill, North Carolina 27517

**Web Site:** <http://www.idb.org>

**Contact:** Andrea L. Carpenter  
Vice President, Finance  
and Administration  
[carpenter@idb.org](mailto:carpenter@idb.org)

**Phone Number:** (919) 969-8008

**Fax Number:** (919) 969-6792

**Business Size:** Large

**Special Item Numbers:** 874-1 Integrated Consulting Services  
874-4 Training Services: Instructor Led Training, Web  
Based Training and Education Courses, Course  
Development and Test Administration

**Pricing for Services:** See rate tables below

**Maximum Order:** \$1,000,000

**Minimum Order:** \$100

**Geographic Coverage:** Worldwide

**Points of Production:** Same as company address

**Discount from List Prices or Statement of Net Price:** Prices shown in the table below are net prices

**Quantity Discounts:** None Offered

**Prompt Payment Terms:** Net 30 days

**Government Purchase Cards:** Accepted at, below, and above the micro-purchase  
threshold

**Foreign Items:** None

**Time of Delivery:** As Specified in Task Order

**Expedited Delivery:** Contact Contractor

**Overnight and 2-Day Delivery:** Contact Contractor

**Urgent Requirements:** Contact Contractor

**F.O.B. Point(s)** Destination

**Ordering Address:** Institute for Defense and Business  
1250 Environ Way  
Chapel Hill, North Carolina 27517

Tel (919) 969-8008  
Fax (919) 969-6792

**Ordering Procedures:**

For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs), and a sample BPA can be found at the GSA/FSS Schedule homepage ([www.gsa.gov/schedules](http://www.gsa.gov/schedules)).

**Payment Address:**

Institute for Defense and Business  
1250 Environ Way  
Chapel Hill, North Carolina 27517

**Warranty Provision:**

Contractor's standard commercial warranty

**Export Packing Charges:**

N/A

**Terms and Conditions of Government Purchase Card Acceptance:**

N/A

**Terms and Conditions of Rental, Maintenance, and Repair:**

N/A

**Terms and Conditions of Installation:**

N/A

**List of Participating Dealers:**

N/A

**Preventative Maintenance:**

N/A

**Special Attributes Such As Environmental Attributes:**

N/A

**Section 508 Compliance on EIT:**

N/A

**DUNS Number:**

01-087-6626

**Notification Regarding Registration in System for Award Management (SAM) Database:**

Registered

## **Overview**

The Institute for Defense and Business (IDB) is a 501(c) (3) non-profit research and educational institute incorporated in 1997 to facilitate and manage basic and applied research, to conduct education programs, and to coordinate and manage interdisciplinary and intergovernmental projects across a range of subject matter areas. An independent legal entity governed by a self-perpetuating Board of Directors, the IDB works closely with the University of North Carolina at Chapel Hill's Kenan-Flagler Business School (KFBS), University of North Carolina System Schools including North Carolina State University (NCSU) and North Carolina Agricultural and Technical State University (NCA&T), Indiana University's Kelley School of Business, and other leading academic and research institutions across the country.

IDB's work includes exploring emerging technology innovations and best-in-class business processes that drive business practices and organizational performance. The theme of IDB's work is the concept of bringing together Department of Defense, other government agencies, and private sector organizations in an academic setting to share best practices, integration of information, and decision-support systems in logistics and management of supply chain, technology, and organizational innovation. Similarly, IDB's research efforts lie at the nexus of public and private business operations—exploration of innovation, interchange of best practices, and application of commercial solutions.

Our programs and events provide an energized forum for these government and private sector participants to meet on “neutral ground” in an academic, non-attribution environment, which facilitates ongoing and open exchange regarding mutual challenges, opportunities, and objectives. The IDB has approximately twenty (20) full-time employees and draws on a wide array of professional, technical, and academic resources in the nation's university systems and in the private sector. Additional information regarding the IDB senior staff, programs, its distinguished Board of Directors and the IDB Executive Fellows may be found at our website, [www.idb.org](http://www.idb.org).

The primary activity centers and programs of the IDB include:

**Logistics and Technology** - The IDB's flagship program is the Center of Excellence in Logistics and Technology (LOGTECH), established in partnership with the University of North Carolina at Chapel Hill's Kenan-Flagler Business School in 2000 to serve uniformed and civilian personnel of the DoD, DoD agencies, all the military services and joint commands. LOGTECH programs include research, executive education, forums, and a Subject Matter Expert Board. Through LOGTECH, the IDB has engaged in a range of additional initiatives, such as research projects for the Directorate for Logistics, J4, the Joint Staff, the U.S. Marine Corps, the Defense Logistics Agency, and others.

Building upon this base of experience, the IDB has also developed a commercially-offered program for early career logisticians -- Log21: Logistics for the 21st Century. Finally, our newest addition to this suite of programs is a supply chain skills course – MedLog21 -- for early career medical logisticians, also offered commercially.

**Leadership and Organizational Transformation** - The IDB has developed and delivered programs to serve senior military and civilian leaders to establish the foundation for the key leadership engagement techniques and approaches required to deliver successful solutions to demanding operational problems. The Depot & Arsenal Executive Leadership Program (DAELP), developed originally for commanders and senior civilian leaders of the Army's Depot and Arsenal facilities, is delivered in partnership with UNC's Kenan-Flagler Business School and has grown to include participants from the Marine Corps, Navy, Air Force, Coast Guard, Defense Logistics Agency and the private sector. DAELP provides a strategic overview of the key functional, analytical, and managerial elements required for effective leadership of large complex manufacturing, repair, and overhaul organizations. The IDB also has developed a program for the Office of the Secretary of Defense (OSD) to bring together senior operational leaders from across the defense enterprise to address organizational challenges during information system acquisition and insertion.

**Stabilization and Economic Reconstruction** - The Center for Stabilization and Economic Reconstruction (CSER) was initiated by the IDB in 2005. CSER builds upon the IDB's many years of experience in conducting applied research and in designing and delivering unique educational facilitated sessions for a variety of clients including the Department of Defense. CSER houses a range of ongoing and custom-developed programs of the IDB that address the challenges of economic recovery of post-conflict and failed states. CSER programs have included a series of pre-deployment facilitated roundtables for U.S. Army and Marine Corps units to help prepare them for deployment to Iraq or Afghanistan. These efforts typically focus on governance and economic lines of operation plans and strategies. CSER also developed a reach-back web portal to assist deployed military personnel in their stability and reconstruction efforts. Additionally, CSER has offered a series of in-depth one-week stability and economic reconstruction seminars targeted at interagency coordination and cooperation on logistics issues.

**Life Cycle Systems and Engineering** - The IDB designed the acquisition-focused Life Cycle Executive Leadership Program to provide military, civilian and private sector engineers, program and contract managers and integrators advanced education in life cycle management principles and total cost of ownership. The one-week executive education offering is delivered two or three times per year.

**Strategic Studies** – Two IDB offerings currently comprise this activity area, including an intensive five-week residential graduate level program, the UNC-IDB Strategic Studies Fellows Program (SSFP). Designed for O-3 grade military officers and their civilian counterparts in the U.S. Government and the private sector and first delivered in 2012, the SSFP offers students the opportunity to learn from faculty in the disciplines of business; journalism; peace, war and defense, and many others, and prepares them for increased spans of control and an increased level of decision-making. When held during the summer, students live in student housing at the University of North Carolina at Chapel Hill (UNC), eat in campus facilities, and attend classes and activities on UNC's campus as well as engage in visits to other surrounding universities. Upon course completion, the students receive a joint certificate from the Institute for Defense and Business and UNC and three graduate-level academic credit hours from Indiana University's Kelley School of Business.

The IDB-UNC LogMBA degree, offered in partnership with Indiana University's Kelley School of Business and UNC's Kenan-Flagler Business School, now features a strategic studies track option.

## **Summary**

Since 1997, the IDB's proven experience and successful interaction with its clients to offer custom-developed and established executive education and research programs has provided a solid foundation to continue to grow the IDB mission of fostering shoulder-to-shoulder interchanges among government, military, and the private sector organizations needed to meet their responsibilities in an ever-expanding range of mission sets. The IDB continues to leverage its truly unique combination of resources which includes:

- high-level advisory boards;
- the IDB Executive Fellows;
- top-tier quality staff and faculty;
- a network of over almost 4,000 influential alumni in government and the private sector;
- partnerships with over 50 world class private sector firms; and
- a strong relationship with the U.S. Chamber of Commerce.

The IDB combines all of these resources and capabilities to meet critical and urgent needs and to bring together the U.S. government, the private sector, and academia to achieve excellence and innovation.

## **Services Under Special Item Numbers (SINs) Offered by the IDB**

### ***SIN 874-1 - Integrated Consulting Services***

The IDB provides facilitation and related group information dissemination and decision support services to the U.S. military and the nation's governmental agencies in the form of roundtables, forums, and facilitated work sessions. The IDB's experienced facilitation professionals work with diverse organizations to focus teams or groups to plan, coordinate, and implement management, organizational, and business improvement initiatives.

***Performing Meeting Logistics and Overall Planning*** - The right time, the right place, and the proper venue are critical to establishing a meeting environment that will be productive and informative to all participants. The IDB is unparalleled in defining, locating, securing, and executing the various logistical aspects of facilitated sessions. The IDB can also offer assistance in securing travel for participants as the client desires.

***Defining and Refining the Agenda*** - IDB facilitators define and refine the facilitation session agenda in order to ensure clarity of the team vision and mission objectives. Facilitators will identify key stakeholders and session participants and prepare facilitation session materials and schedule.

***Identifying Meeting Methods*** - The IDB will define facilitation session boundaries and priorities and select or develop appropriate facilitation tools, technologies, and exercises. The IDB facilitators will further define the role of the facilitators and presenters and Choreograph the session as appropriate.

***Convening and Leading Large and Small Group Briefings and Discussions*** - The IDB is experienced in planning, convening, and leading both small and large group briefings and discussions for U.S. military and government agencies. The IDB facilitators and group session leaders are experienced in keeping groups focused on session objectives with the result of ownership of session products. The IDB may draw faculty and presenters for these sessions from leading academic institutions, U.S. government agencies, the military and the private sector, including the NGO community.

***Recording Discussion Content and Enabling Focused Decision-making*** - The IDB facilitator focuses the collaborative problem analysis and decision-making process by utilizing storyboard techniques and/or decision-prompting computer programs during the session. A report summarizing group/team discussions and progress is promptly presented for participant review to capture and reinforce session results.

***Debriefing Stakeholders*** - The IDB can debrief the key stakeholders and develop action items to implement session recommendations and findings. The IDB can further assist the stakeholders by tracking progress on selected action items and providing follow-on progress reporting of the critical factors of session results.

***Providing a Draft Report of the Facilitated Issues for the Permanent Record*** - The IDB can provide a written report of the completed session. This report documents attendance, session objective(s), session topics, materials presented, results summary, and lessons learned. The report can be used as a draft for the permanent record.

## ***SIN 874-4 - Training Services: Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration***

The Institute for Defense and Business offers a variety of educational services to both the government and private sector. Our education programs include customized course development of “one-of-a-kind” offerings developed specifically for our client’s unique educational needs as well as a broad range of “standing” offerings developed and refined through numerous successful deliveries. To develop and deliver programs, the IDB draws on its extensive executive education experience of its staff, faculty, and other subject matter experts in the areas of public/private best business practice adoption and leadership development. The IDB leverages these resources and experience to tailor courses to the specific requirements of its clients and brings together in a collaborative educational environment government managers, private sector executives, and military leaders.

Since its inception, the IDB has had a strong focus on cutting edge transformational topics including:

- Performance Based Logistics (PBL)
- Disruptive technologies in logistics including RFID and other wireless technology applications
- Public-Private partnerships in military industrial activities
- Economic reconstruction in counterinsurgency/stability operations
- Life cycle systems engineering
- Change/transformation leadership

These topics are taught by the highest quality and experienced education professionals. IDB draws upon faculty for its programs and research from the University of North Carolina’s 16 campus system as well as other universities around the country. In addition to faculty from the University of North Carolina at Chapel Hill’s Kenan-Flagler Business School, faculty is also frequently drawn from North Carolina State University (NCSU) and North Carolina Agricultural and Technical State University (NCA&T). IDB’s faculty team is a powerful and unique combination of scholars that includes award winners, ground-breaking researchers, sought-after consultants, often-quoted experts, and noted U.S. and international textbook authors.

## ***IDB Educational Offerings***

Our educational courses are developed and presented on a case-by-case basis and are directed toward specific business and organizational goals. Each course is structured specifically for our clients to reflect the operational environment, mission, and approach that exists in the target audience. Our structured programs examine industry best practices for our clients to provide insight into how to successfully overcome inertia, generate momentum, and successfully move large entities toward needed change. Our courses have admissions requirements to assure a diverse student group with consistent educational goals. The educational programs are structured in such a way as to blend leading academic faculty, corporate leaders, and military and governmental decision makers to provide a panoramic view of the enterprise solution landscape from the perspective of successful implementers.

**Prices include lodging and meals.**

<b>Course Title</b>	<b>Brief Description</b>	<b>Course Length</b>	<b>Minimum Participants</b>	<b>Maximum Participants</b>	<b>GSA Price Per Participant</b>
UNC-IDB Strategic Studies Fellows Program (SSFP) (On-Campus Housing)	The UNC-IDB SSFP, delivered in the summer with lodging in on-campus housing, provides a unique leadership development experience to enhance U.S. military officers' and their defense sector partners' critical and strategic thinking skills and to increase their knowledge base. The program provides broadening opportunities for high-potential and experienced mid-grade officers and their private sector counterparts to expand their understanding of national security, strategy, communications, business operations, technology, and change management.	5 weeks	25	50	\$13,965.00
LOG21: Logistics for the 21 <sup>st</sup> Century	Log21 is designed to provide early-career, high-potential logisticians with a tailored educational experience to propel their careers in logistics and sustainment. This program, offered three times per year, includes participants from the DoD, DoD agencies, the military services, the Department of Homeland Security and the private sector.	5 days	25	40	\$6,000.00
MedLog21: Supply Chain Skills for Medical Logisticians in the 21 <sup>st</sup> Century	MedLog21 is designed for high-potential logisticians professionals from the Veterans Health Administration (VHA), U.S. Government agencies, the medical services industry, and the Department of Defense (DoD), including the military services and DoD agencies. The focus of the program is on providing an academic venue where participants,	5 days	15	35	\$5,984.89 (\$5,486.15 per participant for 12 participants [pre-paid], for attendance at the course within a 12-month period beginning with the first enrollment)

	along with talented faculty and presenters, can discuss, learn, and work on collaborative solutions for the critical issues facing the industry today.				
Life Cycle Executive Leadership Programs (LCELP)	These week-long programs are designed for O4-O6 military leaders as well as government civilian and private sector equivalents responsible for maintaining a life cycle focus within their respective organizations. This program is offered two to three times per year.	5 days	25	40	\$6,000.00

## **IDB Labor Categories and Pricing**

### ***Labor Category Descriptions***

The following table describes the professional labor categories for SIN 874-1 and SIN 874-4:

<b>Labor Category Title</b>	<b>Responsibilities</b>	<b>Minimum Education and Years of Experience*</b>
<b>Executive Program Facilitator</b>	Provides executive level management, oversight to facilitation activities, programs and projects as well as direct client consulting services. Senior Program Managers, Program Directors, Program Managers, and other senior level staff report to the this level. Assesses requirements and provides overall facilitation direction. May provide specialized technical expertise to meet requirements.	Requires doctorate degree including Ph.D., Ed.D. or J.D. degree with 12 years experience in large facilitation activities, program management planning and execution at the executive level.
<b>Senior Facilitator II</b>	Must have demonstrated problem-solving skills associated with such facilitation with the federal government or private industry. Must possess technical insight / capabilities of strategic significance in subject area which is nationally recognized.	Requires undergraduate degree and 10 years experience in required field; with at least 6 years experience in the facilitation of working group and team processes.
<b>Senior Program Manager I</b>	Responsible for planning and executing a program as well as developing the program schedule and budget. Often serves as the technical lead for the project. Other tasks include staff assignment and management, task management. Develops program content and schedule of events. Selects faculty as needed based on program requirements	Requires master's degree and 8 years experience in event planning and management or hospitality industry.
<b>Program Associate III</b>	Provides execution direction and support for program. Researches, plans, assesses, and schedules off-site group accommodations for program activities and meetings. Develops program materials, corresponds with program participants, schedules faculty with limited supervision.	Requires undergraduate degree with 5 years of related experience.

Labor Category Title	Responsibilities	Minimum Education and Years of Experience
<b>Program Associate II</b>	Provides execution support for program. Researches, assesses and schedules off-site group accommodations for program activities and meetings. Develops program materials, corresponds with program participants, schedules faculty.	Requires undergraduate degree with 3 years of related experience.
<b>Program Associate I</b>	Provides operational support for programs at execution level to Program Directors and Program Managers.	Requires undergraduate degree with 1 year of related experience.
<b>Senior Faculty Instructor</b>	Provides education instruction in one or more subjects in commercial, governmental, industrial, or service establishments. Experienced in the utilization of teaching methods such as individual coaching, group discussions, lectures, demonstrations, seminars, and workshops. Develops course materials to support the education experience of the students. May provide direct assistance to students in practical work carried out as a part of the course structure.	Requires a doctorate degree in education or a subject area with 12 years experience in subject area or field closely related. Includes peer recognition of experience and accomplishments.
<b>Faculty Instructor</b>	Provides education instruction in one or more subjects in commercial, governmental, industrial, or service establishments. Experienced in the utilization of teaching methods such as individual coaching, group discussions, lectures, demonstrations, seminars, and workshops. Develops course materials to support the education experience of the students.	Requires a masters degree in education or a subject area with 8 years experience in subject area or field closely related. Includes peer recognition of experience and accomplishments.
<b>Program Manager I</b>	Perform tasks associated with client and project communication and coordination on segments of large scale engagements. Prepares client and program reports and presentations. Provides assistance in internal planning and management structure for tracking accomplishment of work assignments for staff.	Requires undergraduate degree with 4 years of related experience.
<b>Research Associate</b>	Designs, facilitates, implements, and evaluates research project and activities. Responsibilities include execution of research activities, facilitating work of research project activities, coordinating and monitoring all aspects of research including collecting and analyzing data, summarizing existing reports and literature, and producing final reports.	Requires undergraduate degree or currently enrolled in undergraduate program with academic honors. 1 year experience.

- \* The following substitution of education experience with the work experience applies:
  - Masters Degree (MA/MS) + 8 extra years experience = Doctorate Degree (PhD/EdD/JD)
  - Undergraduate Degree (BA/BS) + 6 extra years of experience = Masters Degree (MA/MS)
  - Associate Degree or High School equivalency + 6 extra years of experience = Bachelor's Degree (BA/BS)

## ***Labor Category Pricing***

Prices shown are net. Travel and other direct costs (ODCs) will be negotiated with the customer agency at the task order level outside of the GSA contract (on an “open market” basis).

Labor Category Title	Market Rate
<b>Executive Program Facilitator</b>	\$375.29
<b>Senior Facilitator II</b>	\$281.41
<b>Senior Program Manager I</b>	\$135.00
<b>Program Associate III</b>	\$88.00
<b>Program Associate II</b>	\$62.37
<b>Program Associate I</b>	\$52.72
<b>Senior Faculty Instructor</b>	\$359.40
<b>Faculty Instructor</b>	\$272.70
<b>Program Manager I</b>	\$115.68
<b>Research Associate</b>	\$75.00