

**General Services Administration
Federal Supply Service**

Authorized Federal Supply Schedule Price List

**Mission Oriented Business Integrated Services
(MOBIS)**

Contract Number: GS-10F-0001W

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,
Learning Management, Internships

Contract Period: October 1, 2014 through September 30, 2019

Type of Contractor: Small Business

Modified May12, 2015



Balanced Scorecard Institute
2000 Regency Parkway, Suite 425
Cary, North Carolina 27518
1-800-209-4009

www.BalancedScorecard.org

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Section I: General Contract Information

Awarded 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, Learning Management, Internships
Maximum Order	\$1,000,000.00
Minimum Order	\$100.00
Geographic Coverage	Strategy Management Group, Inc. (dba Balanced Scorecard Institute) will provide services under this contract in the 50 states and the District of Columbia.
Points of Production	Cary, North Carolina
Discount/Pricing	Volume/Quantity discount: 1% discount on task orders over \$100,000
Quantity Discounts	None Offered
Prompt Payment	Net 30 days
Foreign Items	Not applicable
Time of Delivery	Strategy Management Group, Inc. will adhere to the delivery schedule as specified by the task order.
Expedited Delivery	To be negotiated per each delivery order between contracting activity and contractor. Contact Strategy Management Group, Inc.
Overnight and 2-Day Delivery	To be negotiated per each delivery order between contracting activity and contractor. Contact Strategy Management Group, Inc.
Urgent Requirements	Contact Strategy Management Group, Inc. for urgent requirements.
F.O.B. Points	Destination
Ordering Address	Strategy Management Group, Inc. dba Balanced Scorecard Institute 2000 Regency Parkway, Suite 425 Cary, North Carolina 27518 Phone: 919-460-8180 FAX: 919-460-0867

Email: bkeihn@balancedscorecard.org

Payment Address

Strategy Management Group, Inc.
dba Balanced Scorecard Institute
2000 Regency Parkway, Suite 425
Cary, North Carolina 27518

Phone: 919-460-8180

FAX: 919-460-0867

Email: bkeihn@balancedscorecard.org

Warranty Provision

Standard Commercial Warranty

Authorized Negotiator

Steven A. Musick

Phone: 919-460-8180 ext. 119

FAX: 919-460-0867

Email: smusick@balancedscorecard.org

Export Packing Changes

Not Applicable

**Term and Conditions of
Government Purchase Card
Acceptance**

Contact Strategy Management Group, Inc.

DUNS Number

11-2459370

System for Award Management

Registered in SAM

Section II: MOBIS SIN's and Price Lists

Contractor: Strategy Management Group, Inc., dba Balanced Scorecard Institute

Listed below are the labor categories, education levels, years of experience and the hourly rates awarded under the MOBIS Schedule 874, Special Item Numbers: 874-1, 874-1RC, Consulting Services, 874-4 and 874-4RC, Training Services.

Labor Category	Qualifications	Primary Roles	GSA Daily Rate	GSA Hourly Rate
Officer/Principal	17+ Years experience Advanced Degrees & Certifications BSCI Officer	Engagement Oversight Client Relations Quality Control Project Lead	\$2,998.32	\$374.79
Senior Consultant/Trainer/Facilitator	15+ Years experience Advanced Degrees	Project Lead	\$2,248.74	\$281.09
Consultant/Trainer/Facilitator	10+ Years experience Degreed	Project Support	\$1,499.16	\$187.40
Business Analyst	5+ Years experience Degreed	Project Support	\$ 780.84	\$ 97.60

The Consulting Services consist of the labor categories shown below.

Labor Category	Education	Years of Experience	Consulting 874-1
Officer/Principle	Masters	17	X
Sr. Consultant/Trainer/Facilitator	Masters	15	X
Consultant/Trainer/Facilitator	Bachelors	10	X
Business Analyst	Bachelors	5	X

874-4 Customized Courses

Course Title	Course Number	Price
Introduction to the Balanced Scorecard	301C	\$14,055.42
Advanced Balanced Scorecard Train the Trainer	401C	\$14,055.42
Balanced Scorecard Boot Camp	370C	\$33,381.61
Balanced Scorecard Certificate Program	CP501C	\$74,962.22

874-4 Off-the-Shelf Courses

Course Title	Course Number	Price
Balanced Scorecard Executive Overview On Site	102	\$4,450.88
Introduction to the Balanced Scorecard	301	\$1,869.42
Advanced Balanced Scorecard Train the Trainer	401	\$1,845.94
Balanced Scorecard Boot Camp	370	\$3,865.57
Balanced Scorecard Master Certificate Program	501	\$8,105.28

Labor Categories and Descriptions

Officer/Principal

Leads the planning and execution of consulting (SIN 874-1), or training (SIN 874-4) projects. Responsible for organizing, monitoring, and documenting project activities. Acts as a project leader responsible for the overall management of multiple projects. Designs and implements project plans in coordination with consultant/facilitator/trainers. Meets and confers with customer management officials regarding the status of specific contracts. Briefs stakeholders of results.

Minimum Education: Master’s Degree

Minimum Experience: 17 years

Senior Consultant /Trainer/Facilitator

Displays expert and flexible use of relevant knowledge and techniques in consulting (SIN 874-1), or training (SIN 874-4). Contributes to advanced methods and techniques in the fields of consulting, facilitation or training including the design of consulting/facilitation methodology, course development, consulting/facilitation of major client projects, course instruction, and briefing stakeholders on the results of consulting/facilitation/training projects. Is able to conceptualize, coordinate, and carry on difficult consulting/facilitation/training projects. Recognized as a senior level contributor. Meets and confers with customer management officials regarding the status of specific contracts. Participates in stakeholder briefings. Supervises multiple, overlapping project teams.

Minimum Education: Master’s Degree.

Minimum Experience: 15 years

Consultant / Trainer/Facilitator

Displays full and flexible use of relevant knowledge and techniques in consulting (SIN 874-1), or training (SIN 874-4) and demonstrates innovative use of concepts and principles in complex assignments. Examples may include assisting in the design of consulting/facilitation methodology, course development, consulting/facilitation of client projects, course instruction, and assisting in briefing stakeholders on the results of consulting/facilitation/training projects. Recognized a key contributor, having produced unquestionable technical work. Works with minimal supervision and technical guidance.

Minimum Education: Bachelor’s Degree.

Minimum Experience: 10 years

Business Analyst

Provides support for Officer/Principal or Consultant/Trainer/Facilitators in the execution of consulting (SIN 874-1), or training (SIN 874-4) projects. Responsible for project research and documentation activities. Researches industry or customer information. Completes project documentation in coordination with consulting/facilitation/training staff. Creates reports for use by Program Managers in briefing stakeholders on project progress.

Minimum Education: Bachelor's Degree.

Minimum Experience: 5 years

SCA Statement

The Service Contract Act (SCA) is applicable to this contract as it applies to the entire MOBIS 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 CFR 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.

Course Catalog

Introduction to the Balanced Scorecard

Course 301 - 3 Days

Price: \$2,955

Learn how to build and implement a balanced scorecard for any public or private sector organization in nine steps. This is a practical, "hands-on" workshop that covers best practices, Harvard Business School case studies, exercises, lessons-learned, real-life examples of scorecard systems, and expert facilitation on your organization's management system. For business, government, and not-for-profits. Public three-day workshop; follow-up support via phone and e-mail.

Advanced Balanced Scorecard Train the Trainer

Course 401 - 3 Days

Price: \$1,970

This course covers our Nine Steps to Success™ balanced scorecard methodology, but goes much deeper than the Introduction course, providing more tools and techniques to help managers and analysts build, deploy, and sustain a scorecard system in their organization. Course 301 (or equivalent knowledge and experience) is recommended before taking this course and is required for certification. This course provides a quick review of basic scorecard building steps, adds advanced building techniques, and goes in depth with cascading a scorecard system throughout an organization, automating the scorecard, and evaluating the impact of the scorecard system and making corrections. The course includes modules on change management and communications, and strategic facilitation of teams.

Balanced Scorecard Boot Camp

Course 370 - 5 Days

Price: \$4,925

This course combines the material in the Introductory and Advanced Balanced Scorecard courses and moves at an accelerated pace. This course covers the entire range of balanced scorecard topics - organization development, change management and communications planning, strategic planning, objectives and strategy mapping, performance measures and target setting, strategic initiative prioritization, automation, cascading, and strategic management - in one week. The course covers scorecarding in business, government, and non-profit organizations. The pace is quick, but you will be rewarded with an in-depth and practical knowledge of balanced scorecard systems!

Balanced Scorecard Certificate Program

Course 501 - 10 Days

Price: \$9,850

This 10-day program, offered in association with the George Washington University College of Professional Studies, is a comprehensive program on leading a balanced scorecard planning and management system implementation. It is the fastest pathway for participants to receive **Balanced Scorecard Master Professional (BSMP)** certification. The program, covering two calendar weeks, is ideal for participants charged with building, implementing, managing, and sustaining balanced scorecard planning and management systems. It was developed by the Balanced Scorecard Institute for members of internal balanced scorecard teams, for consultants who want to advise clients on how to build, deploy, and sustain scorecard systems, and for anyone who wants to incorporate lessons learned and best practices into the development of a strategic management system.

Balanced Scorecard Executive Overview - On Site

Course 102 - 1/2 Day

Price: \$4,750 plus travel expenses

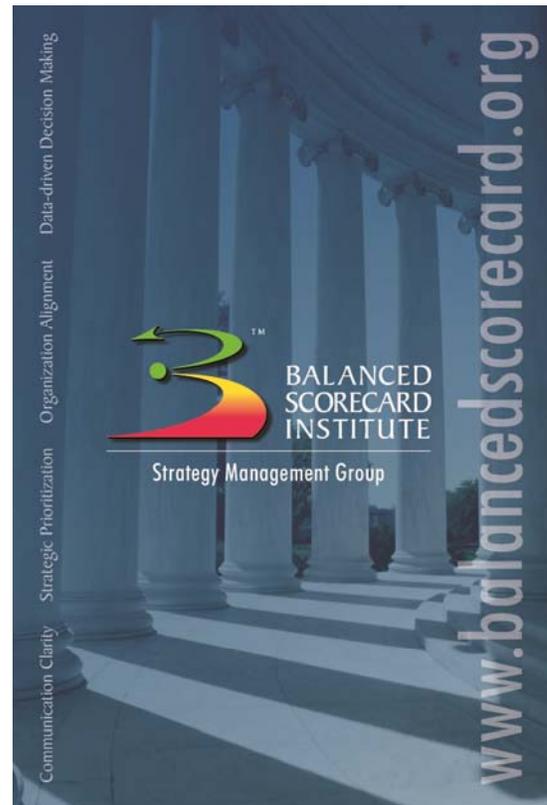
A three-hour interactive seminar for leaders and managers that addresses the "what", "why", and "how" of balanced scorecard systems. This is the high-level, strategic view of balanced scorecards as strategic performance management systems. The seminar includes discussion of your organization's

requirements, costs and benefits of adopting a scorecard system, challenges and opportunities, scheduling and staffing, and how to organize a balanced scorecard effort for your organization. After discussing your needs, we create a roadmap for building and deploying a scorecard system in your organization. Economy class travel expenses are additional.

Section III: About the Balanced Scorecard Institute

The **Balanced Scorecard Institute**, a **Strategy Management Group** company, provides training, certification and consulting services to commercial, government, and non-profit organizations in applying best practices in balanced scorecard, strategic performance management and measurement, and transformation and change management.

Products and services include public and on-site courses, facilitation and consulting services, professional certification and information and tools used by executives, managers and analysts to transform their organizations into "performance excellence" organizations. Institute competencies include balanced scorecard, strategic planning, performance measurement and management, organization transformation and performance management automation software. Institute consultants and trainers focus on building the client organizational capacity needed to continue developing the elements of their performance management systems themselves.



The Institute has experience in developing change management and communications strategy and plans, strategic plans and performance management and measurement systems. Members of the Institute team have worked for hundreds of organizations in 17 countries in the private, public, and not-for-profit sectors, and have provided consulting support to several countries, a dozen U.S. cities, several counties, seven Federal Cabinet level agencies and private companies ranging from the smallest entrepreneurs to the Fortune 200. The Institute offers a Professional Certification Program, jointly sponsored by the George Washington University College of Professional Studies, with two levels of certification: the **Balanced Scorecard Master Professional (BSMP)** and **Balanced Scorecard Professional (BSP)**. The Institute's practical framework for building and deploying balanced scorecards, the award winning *Building and Implementing a Balanced Scorecard Framework: Nine Steps to Success™* (see Figure 1 below) is used worldwide. Institute clients include the Ethiopian Federal Ministry of Health, Arapahoe County (CO), National Cancer Institute/OPIRM, Fort Bragg Army Garrison, Wake County Community Services (NC), Chicago Virtual Charter Schools, Constellation Energy, Dalton Public Schools, Simmons Foods, Atlanta Public Schools, the Society of Composers, Authors and Music Publishers of Canada, the U.S. Department of Commerce – Foreign and Commercial Services, the City of Raleigh (NC), Federal Home Loan Banks, the City of Newark (NJ), LukOil (Russia), Blue Man Group, Greenville Utilities Commission (NC), Susan G. Komen for the Cure (Breast Cancer Foundation), Austin Capital Metro (TX), Buncombe County (NC), Mecklenburg County (NC), U.S. General Services Administration, ECC, Pinellas

County (FL) Sheriff's Office, the Oneida Indian Nation (WI), Purdue University, LifeNet, the U.S. Marine Corps Systems Command, the Joint Inter-Agency Task Force-South, Croatian Telecomm, Jacksonville Regional Chamber of Commerce, Household Mortgage Services, the U.S. House of Representatives, ECC, Veolia Water, CESA 6, Northwest Fire District (AZ), National Marrow Donor Program, the Canada Passport Office and the American Public Gas Association.

Figure 1: The Institute's Nine Step Methodology



Building and Implementing a Balanced Scorecard: Nine Steps to Success™

- Step One: Assessment
- Step Two: Strategy
- Step Three: Objectives
- Step Four: Strategy Map
- Step Five: Performance Measures
- Step Six: Initiatives
- Step Seven: Performance Analysis
- Step Eight: Alignment
- Step Nine: Evaluation

For more information, visit www.balancedscorecard.org

The Institute also provides, through the balancedscorecard.org website, a resource to obtain information, ideas and best practices based on lessons learned from extensive experience in building strategic management and performance measurement systems using the *Nine Steps* balanced scorecard methodology. The balancedscorecard.org website has been the number one website for balanced scorecard information for several years.

The Institute's roots go back to 1997, when the *Nine Steps* balanced scorecard methodology and course were developed and taught through the U.S. Foundation for Performance Measurement. In 1998, the Institute name and Web site were created. The Balanced Scorecard Institute became a full-service training, facilitation, and consulting business in 2003 when the Balanced Scorecard Institute (internet resource site), the U.S. Foundation for Performance Measurement (training & consulting) and Howard Rohm Consulting, LLC (international consulting) merged to form a single organization. In 2005, the Institute became part of the Strategy Management Group, Inc., with offices in Cary, North Carolina and Washington, DC.