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OKA (Otto Kroeger Associates)  
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**General Services Administration - Federal Supply Services  
Mission Oriented Business Integrated Services (MOBIS)**

**OKA Catalog**

Contract Number: GS-10F-0015R

Modification PA-0003

October 1, 2014 – September 30, 2019

OKA (Otto Kroeger Associates) is pleased to present this catalog for our prime contract with General Services Administration (GSA) Federal Supply Services (FSS)

OKA holds a Management, Organizational, and Business Improvement Services (MOBIS) Schedule, covering:

SIN 874-1      Integrated Consulting Services

SIN 874-4      Training Services:      Instructor Led Training, Web Based Training,  
Education Courses, Course Development, Test  
Administration, Learning Management, Internships.

Visit: <https://www.gsaadvantage.gov> to order. Search for contract GS-10F-0015R.

**MOBIS Contract Information**

**Otto Kroeger Associates, LLC (OKA)**

**Government**

**Business & Contract - POC:**

**General Services Administration - POC:**

Primary:      Cathy Zekan – Finance Manager  
Secondary:    David H. Rutledge (Hile) – President

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Management Services Center  
Phone: (253) 931-7234  
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**Business Size:      Small**



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## 1.0 Customer Information

### 1a. Table of Awarded Special Item Numbers with appropriate cross-reference to page numbers

SIN 874-1	Integrated Consulting Services	Page 7
SIN 874-4	Training Services: Instructor Led Training, Web Based Training, Education Courses, Course Development, Test Administration, Learning Management, Internships	Page 9

### 1b. Lowest priced Labor Category within each SIN

SIN 874-1	Senior Associates/Consultants	\$ 155.77 / hour
SIN 874-4	N/A	N/A

### 1c. Labor Category Descriptions

Label category descriptions for SIN 874-1 can be found on pages 9 & 10. The training courses for 874-4 do not have labor categories.

- |    |   |                 |
|----|---|-----------------|
| 2. | <b>Maximum Order:</b>                       | \$ 1,000,000.00 |
| 3. | <b>Minimum Order:</b>                       | \$ 100.00       |
| 4. | <b>Geographic Coverage (Delivery area):</b> | Worldwide       |
| 5. | <b>Point (s) of Production:</b>             | N/A             |

6. **Discount from list prices or statement of net price:**
- Prices shown are net – discounts have been applied*
7. **Quantity Discounts:** N/A
8. **Prompt Payment Terms:** 1% -Net 20 days; Net 30 days
- 9a. **Government purchase cards up to the micro-purchase threshold:** Accepted
- 9b. **Government purchase cards above the micro-purchase threshold:** Accepted
10. **Foreign items (list items by country of origin):** None
- 11a. **Time of Delivery:** As Specified
- 11b. **Expedited Delivery:** N/A
- 11c. **Overnight & 2<sup>nd</sup> Day:** N/A
- 11d. **Urgent Requirements:** N/A
12. **F.O.B. Points (s):** Destination
- 13a. **Ordering Address:**
- OKA (Otto Kroeger Associates)  
 3605 Chain Bridge Road  
 Fairfax, VA 22030
- 13b. **Ordering Procedures:**
- For supplies and services, please see the ordering procedures, information on Blanket Purchase Agreements (BPA's), and a sample BPA at the GSA/FSS Schedule homepage ([fss.gsa.gov/schedules](http://fss.gsa.gov/schedules)).
14. **Payment Address:**
- OKA (Otto Kroeger Associates)  
 3605 Chain Bridge Road  
 Fairfax, VA 22030

- |      |   |                  |
|------|---|------------------|
| 15.  | <b>Warranty provision:</b>  | N/A              |
| 16.  | <b>Export Packing Charges:</b>  | N/A              |
| 17.  | <b>Terms and conditions of Government purchase card acceptance:</b>   | N/A              |
| 18.  | <b>Terms and conditions of rental, maintenance and repair (if applicable):</b>  | N/A              |
| 19.  | <b>Terms and conditions of installation:</b>  | N/A              |
| 20.  | <b>Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable):</b>  | N/A              |
| 20a. | <b>Terms and conditions for any other services (if applicable):</b>   | N/A              |
| 21.  | <b>List of service and distribution points (if applicable):</b>   | N/A              |
| 22.  | <b>List of participating dealers (if applicable):</b>   | N/A              |
| 23.  | <b>Preventative Maintenance (if applicable):</b>  | N/A              |
| 24a. | <b>Environmental attributes, e.g., recycle content, energy efficiency, and/or reduced pollutants: (if applicable):</b>  | N/A              |
| 24b. | <b>Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services. The EIT standards can be found at <a href="http://www.Section508.gov">www.Section 508.gov</a>.</b> |                  |
| 25.  | <b>Data Universal Numbering System (DUNS) number:</b>   | <b>116197997</b> |
| 26.  | <b>OKA (Otto Kroeger Associates, LLC) is registered and current in the Systems for Award Management (SAM) database.</b>   |                  |



## OKA: Corporate Overview

Founded in 1977, OKA is a training and consulting firm focusing on the growth and development of organizations, teams, and individuals. Expert in a variety of psychological instruments and group processes, OKA has a reputation as an industry-leader for engaging, high-impact training engagements and workshop events. We train over 500 people a year at our full-service training facility in Fairfax, VA (just outside Washington DC), and regularly conduct custom workshops and consulting projects for government and commercial organizations across the country.

OKA has a special expertise and deep experience in designing workshops, training and consulting engagements which use today's leading personality assessment instruments (Myers-Briggs Type Indicator MBTI®, Emotional Intelligence EQ-i2.0® and many others) to give our clients insights into teambuilding, leadership, communications, conflict management and other critical organizational development areas.

OKA's reputation was originally built on the company's expertise in presenting personality Type and the Myers-Briggs Type Indicator (MBTI) assessment as a personal and organizational tool. Our founders published many books on these topics, including the bestsellers *Typetalk* and *Typetalk at Work*. Today, OKA uses a broad range of assessment tools and approaches to meet a full range of organization development needs for corporate and government clients across the country. Our services include:

- Introductory Workshops in self-awareness, leadership and team development.
- Advanced applications training and teambuilding workshops in topics such as leadership, conflict management, communication, and team development.
- Consulting and coaching engagements informed by our expert use of personality assessment instruments.
- Certification training for HR and Organizational Development practitioners in the use of many personality assessment instruments.

OKA is accredited by the International Association for Continuing Education and Training (IACET). We are also certified as a master training organization for a variety of psychological assessments by the following publishers: MHS; CAPT; Personal Strengths Publishing; and Enterprise Management Limited.

In addition to these services, OKA consultants have authored a wide range of books, workbooks, online materials, videos and training support software.

## OKA Corporate Summary

- Certified Small Business based in Fairfax, VA with an on-site training facility.
- Accredited by International Association for Continuing Education and Training.
- Master Trainers deliver certification-level training on over a dozen validated personality and team assessment instruments.
- Prime contractor with General Services Administration (GSA), holding a Management, Organizational, and Business Improvement Services (MOBIS) Schedule.

## Our Approach

### *“Greater Self-Awareness for Better Self-Management”*

Three bedrock principles drive all OKA work:

- **Participant-Focused:** There is no “one right way” to manage a project, solve problems, or lead a team. While many trainers present standardized approaches, OKA’s enduring success comes instead out of framing these topics from the client’s perspective, personality preferences, and style. As such, we stress self-awareness and self-management as central tools in all our training, incorporating individual and team assessments into classes. This provides data and insights needed for lasting change – driven from within.
- **Theory-Based, Experientially-Learned:** OKA’s models and instruments are rooted in well-researched theories. This provides a stable launching platform for each class or consulting engagement, resulting in immediately applicable feedback. With this stable base in place, we then quickly move to experiential learning and action-based methods. We don't rely on slide-heavy presentations or reports. Instead, we ask people to learn and change by doing, engaging in real-time, interactive activities.
- **Action-Driven:** The more content can be immediately applied to a person’s work, the more it's retained and carried forward. OKA incorporates action planning into each class and project, allowing each participant and client to proceed with a clear set of steps to apply new knowledge “back at the shop.” In many cases, participants and diverse stakeholders at OKA events maintain connections long after the day is over – strong ties forged by a shared commitment to putting new tools to work.

## 2.0 SIN 874-1: Integrated Consulting Services

OKA's consulting and facilitation services include: leadership coaching, training program design and development, team and workgroup facilitation, organization assessments and general organization development consulting.

Selected examples of our past performance in Consulting and Facilitation have included:

**Program Design & Development:** For the U.S. Air Force, OKA developed and delivered a leadership development program with a group of 80-100 Military Training Instructors. This project, which began in 2005, included a comprehensive assessment and gap analysis; in-depth project planning and evaluation; curriculum design; training development and delivery; and individualized leadership coaching.

**Leadership Development:** OKA has client engagements from half day to several years in duration which assist clients with leadership development, utilizing both our renowned expertise in the use of personality assessment instruments and our strong bench of executive consultants and coaches.

**Organization Development Assessment:** OKA has conducted in-depth organization development assessments with corporations, non-profits and most US government agencies. Assessment activities include administering and interpreting a climate survey with a broad selection of employees; conducting interviews and focus groups with stakeholders to identify key strengths, opportunities and areas of needed improvement; and designing and conducting a leadership workshop to plan a path forward.

**Curriculum Development and Workgroup Facilitation.** The NIH National Cancer Institute's caBIG (cancer Biomedical Informatics Grid) initiative serves as the cornerstone of NCI's biomedical informatics efforts to transform cancer research into a more collaborative, efficient, and effective endeavor. OKA has supported the caBIG program as a subcontractor to a large Federal contractor since April 2006, providing targeted expertise in communications, outreach and training, strategic planning, briefing and white paper development, and group facilitation.

**Organization Development Initiative.** OKA began its work with an environmentally-focused non-profit. Initial activities included conducting an organization development assessment at a time when the organization was undergoing significant changes in leadership and governance structure. Assessment activities included a kickoff MBTI workshop; administering and interpreting the Work Environment Scales (WES) with all employees; conducting interviews with selected staff members and managers; conducting a focused strategy session with the senior team; and conducting a full staff debriefing to discuss results and plan an actionable path ahead. Follow-up work in Spring 2008 included a two-day "trust initiative workshop" with the senior team to explore team dynamics and to charter internal organization development projects. OKA has since provided two follow-up training modules, one designed to teach feedback delivery skills to supervisors; and one to develop critical thinking and decision-making skills across the staff.

### 3.0 SIN 874-1: GSA MOBIS Labor Category Descriptions

## GSA MOBIS Labor Categories GS-10F-0015R Otto Kroeger Associates (OKA)

**Subject Matter Experts:** Are experts brought into client engagements for targeted purposes focusing on their areas of expertise. Renowned in their field, these consultants are used for activities such as keynotes, event kick-offs, executive leadership work, quality control and review or other executive consulting services. Subject matter experts have advanced degrees, professional certifications, and an established professional reputation and bring a minimum of 10 years of professional experience.

**Minimum years of Experience:** 13  
**Minimum Education/Degree Requirements:** Master's Degree (MS)  
**Training/Certification Requirements:** MBTI Certification, EQi Certification

**Executive Associates/Consultants:** Are subject matter experts involved with program management and is generally the lead person responsible for OKA client engagements. They bring extensive professional and educational credentials and a minimum of 8 to 10 years' experience in organization development and change management. These consultants specialized areas of expertise in a range of organization development, human resources and change management topics, such as leadership development, coaching, communications and conflict management, large and small group intervention approaches and organizational assessment strategies. Responsibilities include overall client project success, specialized consulting services, developing and overseeing engagement strategy and approach. Executive Associates and Consultants have a minimum of a Master's degree and advanced certification in an area of organization development specialty and have a minimum of 8 - 10 years directly related experience.

**Minimum years of Experience:** 8  
**Minimum Education/Degree Requirements:** Master's Degree (MS)  
**Training/Certification Requirements:** MBTI Certification, EQi Certification

**Managers:** Bring extensive experience in both project development and management. A principal player within the client engagement, the project manager maintains responsibility for the project in all its detail, including client relationships, targets, defining, outlining and acting on deliverables, project scheduling, contracting responsibilities, quality assurance and other related project management activities. Our Project Managers bring with them at least a Bachelor's degree, previous project management experience on multi-faceted projects, and have a minimum of 6 years organizational development experience.

**Minimum years of Experience:** 6  
**Minimum Education/Degree Requirements:** Bachelor's Degree (BS)  
**Training/Certification Requirements:** MBTI Certification, EQi Certification

**Senior Associates/Consultants:** Are highly experienced organization development and change management consultants. These consultants have high visibility within and considerable responsibility for the success of client engagements. Senior Associates/Consultants have specialized areas of expertise in a range of organization development and change management topics, such as the use of individual tools or group processes, leadership development, communications planning, conflict management, team development and motivation strategies. Responsibilities include maintaining client relationships and providing specialized consulting services and trainings. Senior Associates and Consultants have advanced degrees or professional certifications and bring with them a minimum of 6 years' experience.

**Minimum years of Experience:** 6  
**Minimum Education/Degree Requirements:** Bachelor's Degree (BS)  
**Training/Certification Requirements:** MBTI Certification, EQi Certification

## 4.0 SIN 874-1: GSA MOBIS Pricing

<b>Consulting/Facilitation</b>	<b>GSA Rates (Hourly)</b>
Subject Matter Expert	\$315.00
Executive Associate/Consultant	\$216.35
Manager	\$173.08
Senior Associate/Consultant	\$155.77

*Revised May 2012*



**Course Title:**        **Customized Application Workshops**

<b>Length of course:</b>	1 day
<b>Minimum/Maximum number of Participants:</b>	8/30
<b>Price for additional students (above minimum):</b>	\$50.00 per person
<b>Support materials provided:</b>	Assessment instrument options: MBTI, EQi, SDI or PMAI Assessments, as required by client and various participant materials as needed for selected course.

***Description of Class/Workshops:***

The Customized Application Workshops provide a brief history of the instrument, a personal report and/or feedback, experiential exercises to support the theory of the instrument, and a portrait of the group configuration. Participants receive their results during the session and time is devoted to understanding the report forms. Specific exercises are customized to the client group bases on the combined instrument results and the goals and objectives of the client. This may include working on organizational issues such as team building, dealing effectively with conflict, improving communication, decision making, or other related topic. The goal of the Customized Application Workshop is on team development using a targeted concept or area, such as conflict, communication or leadership. This is accomplished by building on the foundation of the awareness and understanding of the theory, personal results, and exploration and application to self, then broadening to the team.

***Examples of courses available are:***

***Interpersonal Skills: Self-Awareness & Communication***  
***Leadership Communication: Having Difficult Conversations***  
***Influencing & Negotiation Skills***  
***Leadership Communication: Driving Change***  
***Understanding & Navigating Conflict***  
***Consulting Skills***  
***Critical Thinking & Decision Making***

**Course Title:**        **Experiential Workshops**

<b>Length of course:</b>	1 day
<b>Minimum/Maximum number of Participants:</b>	8/30
<b>Price for additional students (above minimum):</b>	\$50.00 per person
<b>Support materials provided:</b>	Assessment instrument options: MBTI, EQi, SDI or PMAI Assessments, as required by client and various participant materials as needed for selected course.

**Description of Class/Workshops:**

The Experiential Workshops can assist in your quest for leadership development, greater team functioning, conflict and stress management or simply deeper self-awareness and self-management skills. By combining skills training and theory with experience, the acquisition of knowledge is coupled with the immediate ability to use it in a challenging but controlled environment. This “laboratory” format enables the participants to establish and internalize the practical value to the material being presented. Also facilitating learning are metaphors, the heart of experiential education. Participants learn about “team” not only by analyzing team building skills, but by consciously becoming a team. Individuals discover or rediscover their potential through mastering challenges which are metaphors for challenges faced in the work place.

**Examples of courses available are:**

**Interpersonal Skills: Self-Awareness & Communication**  
**Leadership Communication: Having Difficult Conversations**  
**Influencing & Negotiation Skills**  
**Leadership Communication: Driving Change**  
**Consulting Skills**  
**Critical Thinking & Decision Making**

**Course Title:**        ***Team Tools Workshops***

<b>Length of course:</b>	2 days
<b>Minimum/Maximum number of Participants:</b>	8/30
<b>Price for additional students (above minimum):</b>	\$50.00 per person
<b>Support materials provided:</b>	Assessment instrument options: MBTI, EQi, SDI or PMAI Assessments, as required by client and various participant materials as needed for selected course.

***Description of Class/Workshops:***

The Team Tools Workshops take participants through dozens of exercises – from ice breakers and group energizers to more complex problem solving and trust building activities. ROPES (Reality Oriented Personal Experiences) events, from physical team problem solving to zip wires, have been popular personal and organizational development tools. When set up, facilitated, and debriefed well, these experiential learning events have a dramatic effect on both learning and applying new concepts concerning team, organization, and leadership development. This course brings the power of ROPES learning, too often dependent on outdoor facilities and specialized equipment, to your toolkit—usable in any training design or in any physical space. Supported by extensive procedural write-ups on all exercises presented, this course is designed for participants to put the power of a ROPES course to work right away, as standalone elements or in support of other theories or tools (like the MBTI, EQi, SDI, or PMAI).

***Example of course available is:******Understanding Team Dynamics (2 day course)***

## 6.0 SIN 874-4: GSA MOBIS Pricing

### *SIN 874-4 Pricing*

<b>Training / Event / Workshop</b>	<b>Duration</b>	<b>GSA Rate</b>
Standard Application Workshop	1 day	\$3,692.00
Team Tools	2 days	\$6,864.00
Customized Application Workshop	1 day	\$4,836.00
Experiential Workshop	1 day	\$3,224.00

*Revised May 2012*

## 7.0 Service Contract Act (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 provision 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.

***For further information about OKA and  
our GSA MOBIS Schedule, please  
contact our GSA Primary POC:***

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Finance Manager  
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[czekan@oka-online.com](mailto:czekan@oka-online.com)  
Tel: 703.591.6284