GENERAL SERVICES ADMINISTRATION

Federal Supply Service
Authorized Federal Supply Schedule Price List
On-line access to contract order 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: GSAAdvantage.gov.

Mission Oriented Business Integrated Services (MOBIS)

FSC Group: 874    Class: R499

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
874-5 – Ancillary Supplies and/or Services

Contract Number: GS-10F-0187W
Contract Period: May 4, 2010 – May 3, 2020
Supplement No. 003, effective April 20, 2015

Service and Product Information:
Jessica G. Hartung, Founder and CEO
(303) 516-9001
Jessica@IntegratedWork.com

GSA Contract Administration:
Darby Coleman, Contracts Manager
(303) 516-9001
Darby@IntegratedWork.com

For more information on ordering from Federal Supply Schedules, click on the IWS Team FSS Schedules button at fss.gsa.gov.

Top-rated Performance
Outstanding Service
Certified WOSB
Proven Tools
Effective
Reliable
Certified
Skilled Staff
Expert Coaches
Collaborative Approach

Prices shown herein are Net (discount deducted)
Contents

Customer Information                        Page 3
Company Overview                           Page 6
874-1, 874-1RC – Integrated Consulting Services Page 7
874-4, 874-4RC – Training Services: Instructor Led
Training, Web Based Training and Education Courses,
Course Development and Test Administration, Learning
Management, Internships
874-5, 874-5RC – Ancillary Supplies and/or Services Page 11
Labor Category Descriptions                 Page 13
Customer Information

1a. Awarded special item number(s) with appropriate cross-reference to item descriptions and awarded price(s).
   874-1, 874-1RC – Integrated Consulting Services, pages 7-8
   874-4, 874-4RC – Training Services: Instructor Led Training, Web Based Training and Education Courses, Course Development and Test Administration, Learning Management, Internships, pages 9-10
   874-5, 874-5RC – Ancillary Supplies and/or Services, pages 11-12

1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract. Not applicable

1c. Hourly Rates

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A complete description of minimum experience requirements, functional responsibility, and education for all above labor categories is provided beginning on page 12.

The Service Contract Act (SCA) is applicable to this contract and it includes SCA eligible labor categories. The prices for the cited SCA labor categories are based on the U.S. Department of Labor Wage Determination Number(s) identified in the SCA matrix below. The prices offered are based on the preponderance of where work is performed and should the contractor perform in an area with lower SCA rates, resulting in lower wages being paid, the task order prices will be discounted accordingly.

<table>
<thead>
<tr>
<th>SCA Eligible Labor Category</th>
<th>SCA Equivalent Code</th>
<th>WD Number</th>
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<tbody>
<tr>
<td>Project Assistant</td>
<td>01020- Administrative Assistant</td>
<td>05-2081</td>
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</table>

2. Maximum order. $1,000,000

3. Minimum order. $100

4. Geographic coverage (delivery area). US Domestic only, including Alaska, Hawaii, and Puerto Rico
5. **Point(s) of production (city, county, and State or foreign country).** Boulder, Boulder County, Colorado

6. **Discount from list prices or statement of net price.** All prices listed are net prices.

7. **Quantity discounts.** None

8. **Prompt payment terms.** Net 30 days, Information for ordering officials: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.

9a. **Notification that Government purchase cards are accepted at or below the micro-purchase threshold.** Integrated Work Strategies will accept government purchase cards at or below the micro-purchase threshold.

9b. **Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold.** Integrated Work Strategies will accept government purchase cards above the micro-purchase threshold.

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

11a. **Time of delivery.** Specified on Task Order

11b. **Expedited Delivery.** Contact Contractor

11c. **Overnight and 2-day delivery.** Contact Contractor

11d. **Urgent Requirements.** Contact Contractor

12. **F.O.B. point(s).** Destination

13a. **Ordering address.** 5408 Idylwild Trail, Suite A
Boulder, CO 80301

13b. **Ordering procedures.** For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs) are found in Federal Acquisition Regulation (FAR) 8.405-3.

14. **Payment address.** 5408 Idylwild Trail, Suite A
Boulder, CO 80301

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

16. **Export packing charges.** Not applicable

17. **Terms and conditions of Government purchase card acceptance.** Contact Contractor

18. **Terms and conditions of rental, maintenance, and repair.** Not applicable

19. **Terms and conditions of installation.** Not applicable

20. **Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices.** Not applicable

20a. **Terms and conditions for any other services.** Not applicable

21. **List of service and distribution points.** Not applicable

22. **List of participating dealers.** Not applicable

23. **Preventive maintenance.** Not applicable

24a. **Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants.)** Not applicable
24b. **Section 508 Compliance.** Not applicable

25. **Data Universal Number System (DUNS) number.** 04-2559919

26. **Notification regarding registration in Central Contractor Registration (CCR) database.** Registered
Integrated Work Strategies – Overview

Integrated Work Strategies, LLC (IWS) is a woman-owned, small business offering top-quality management consulting, facilitation, coaching, and training. The firm was founded in April 1998 by the current CEO, Jessica Hartung, and is located in Boulder, Colorado. Over the past 16 years, IWS has grown from a one-person operation to a thriving company. Eight highly-qualified professionals, trained and certified in a variety of organizational learning methodologies, provide management consulting, facilitation, and training to a national client base. The staff have over 55 years of combined experience delivering customized solutions to government agencies and social sector clients. We are passionate about building stronger, self-aware leaders who use their skills to benefit their team and organization. Leaders use the tools and methods they learn from Integrated Work long after an engagement is complete. Our services include:

- Management Consulting
- Mid-Level and Executive Leadership Development
- Employee Engagement Consulting
- Strategic Planning Facilitation
- Partnering Workshops
- Executive Leadership Coaching
- Customized Professional Development Programs
- Customized and Off-The-Shelf Training
- Survey and Assessment Administration

We are proud that 95% of IWS clients are repeat customers because of the value they gain in terms of employee engagement, management performance, and leadership effectiveness. Our consultants thrive on providing the resources and tools that government decision-makers need to more effectively accomplish their goals and fulfill their mission. Our services create a bridge between classroom learning and real work challenges so participants implement action, practice cross-functional collaboration, and accomplish their work more effectively.

Let us support your agency’s success through a customized blend of management consulting, training, coaching, and facilitation that addresses highest priority issues. The following organizations have used our services to transform their operations and improve their metrics:

- Bureau of Health Professions, Health Resources and Services Administration
- Bureau of Primary Health Care, Health Resources and Services Administration
- Federal Highways Administration, Department of Transportation
- Pipeline and Hazardous Materials Safety Administration, Department of Transportation
- Denver Service Center, National Park Service
- Office of Special Health Affairs, Health Resources and Services Administration

Additionally, we hold Blanket Purchase Agreements with the following:

- Health Resources and Services Administration
- Willamette National Forest, Department of Agriculture
874-1, 874-1RC – Integrated Consulting Services

Executive Coaching Package

**Includes**: 8 (one-hour) sessions and assessments  
**GSA Rate**: $2,392.94 per person

Working individually with a leader, coaching sessions provide a focused time to think strategically with a mentoring partner. During coaching sessions, a variety of topics can be explored, but generally the focus is on increasing the effectiveness of interactions with others, and becoming an even more powerful force for positive change. Through coaching, leaders can increase their resilience in the face of adversity, build capacity for solving problems using innovative approaches, and increase their ability to create opportunities to achieve better results in less time. Includes AQ Profile® Developmental Version and TTI Success Insights DISC Behavioral Assessment.

Individual Coaching Package

**Includes**: 12 (one-hour) sessions  
**GSA Rate**: $2,392.94 per person

Working individually on specific opportunities and challenges allows key leaders to receive mentoring and reflect on important decisions and relationships. Our clients find that when the coaching session focuses on their agenda, it helps them reflect and learn even more from their experience. Therefore, the content of coaching sessions is structured around the issues the individual identifies as the most important to discuss. IWS coaching is both empowering for change and honoring of an individual’s existing knowledge and experience. This package includes continuation of coaching sessions over 4-6 months, customized management development materials, and email/phone access to coach in-between sessions for short consultations. This coaching package is designed for those who are already implementing insights from the AQ Profile and DISC Behavioral assessment.

Meeting Facilitation

**GSA On-site, Daily Rate**: $2,659.94

Integrated Work Strategies provides meeting facilitation for organizations requiring their teams to define, refine, and resolve issues related to the organization. The facilitator will set agendas, guide discussions, and work with participants to reach a conclusion regarding the topic. Includes initial client meeting to determine objectives, preparation of agenda and materials to support facilitation, and eight hours of on-site facilitation. The client may request additional services such as conducting input conversations with key stakeholders, meeting participants prior to the on-site session, or developing summary reports of meeting outcomes. Additional services are charged at the Facilitator/Trainer/Coach hourly labor rate.
Strategic Planning Retreats

GSA On-site, Daily Rate: $2,837.27
Integrated Work Strategies provides facilitation and related decision support services for organizations wanting to have a collaborative effort to develop business and organizational plans. The facilitator will set agendas, guide discussions, and work with participants to develop organizations plans, goals, or priority areas. Service includes initial client meeting to determine objectives; input conversations with two key stakeholders; preparation of agenda, engaging exercises, and materials to support on-site session; and eight hours of on-site facilitation. Additional support such as conducting additional input conversations with participants prior to the on-site session, data analysis and synthesis or development of summary reports may be requested by the client. Additional services are charged at the Facilitator/Trainer/Coach hourly rate.

Additional Consulting Services
Consulting services offered by IWS include hourly rates for management and strategy consulting, executive/management coaching services, studies and analyses related to a client’s mission-oriented business programs, peer learning design and delivery, customized business training development, program planning and evaluations, pre- and post-program planning, and research and analysis for facilitated events. Note that under this SIN, we will also modify and customize our Training Services described in SIN 874-4. The following hourly rates are offered for consulting services:

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

Off-the-Shelf Training Courses

Adversity Advantage: The Resilient Mindset

4 to 24 participants  GSA Rate: $2,837.28 per day, plus $221.66 per participant
25 to 60 participants  GSA Rate: $4,965.24 per day, plus $221.66 per participant

The demands placed on Government agencies and their employees are growing exponentially. Will those demands take an ever-increasing toll on your organization, or will you harness them to build greater agility, innovation, and fortitude? This program reshapes organizational culture, individuals, and teams with resilience-based practices and tools to guide exceptional performance, even in the most adversity-rich times. The mindset needed to succeed in highly demanding times can be measured and strengthened with the unique Adversity Advantage Program. The Adversity Quotient (AQ) Profile® assessment, at the heart of the program, is a proven predictor and driver of performance, employee engagement, retention, problem-solving, and health. It is the most widely adopted measure in the world for gauging and strengthening resilience—how people respond to and deal with adversity. Adversity Advantage is supported by a research base comprised of more than 1500 studies from more than 100 universities and organizations globally. More than 500,000 people have measured and strengthened their AQs. Harvard Business School incorporates the Adversity Advantage teachings, tools, and methods into its prestigious Executive Education and MBA programs. This course includes four important aspects:

AQ Profile Assessment – Participants in this course complete this assessment to measure their hard-wired pattern of response to life’s events in four dimensions: Control, Ownership, Reach, and Endurance.

Adversity Advantage On-site Training – One, full-day (8-hour) on-site training is held to introduce the powerful principles and tools to strengthen participants’ response to adversity and increase resilience.

Adversity Advantage SkillSites Reinforcement Challenge – During the 90-days following the on-site course, participants complete 10 online skill-building challenges, requiring only 5-15 minutes of their time. These sessions are designed to strengthen and sustain the learning experience. Course instructors track the progress of participants and provide encouragement when necessary.

AQ Profile Re-assessment – At the conclusion of the SkillSites Challenges, participants are invited to complete a re-assessment of their AQ Profile to gauge the extent of improvement for individuals and the group. Group progress reports can be provided to program sponsors.

Support materials include:

- Adversity Advantage Toolkit which includes the following:
- Enrollment in the online 90-day Reinforcement Challenge
- AQ Profile assessment
- Course Workbook – including interactive exercises, journal, and follow-up activities to support learning
- The Adversity Advantage, a best-selling book by Dr. Paul G. Stoltz and Erik Weihenmayer
- Real Deal card deck – used as a tool to clarify what matters most to participants, strengthen engagement and energy, improve relationships, better align motivators among team members, and reduce destructive conflicts and misunderstandings
- Thriving on the Edge Commuter Audio CD to reinforce learning
- AQ Wallet Card - a quick reference for tools provided in the course
Advanced Facilitation Training

4 to 18 participants  GSA Rate: $2,837.28 per day, plus $13.30 per participant
19 to 32 participants  GSA Rate: $4,965.24 per day, plus $13.30 per participant

Take your facilitation skills to the next level with this highly interactive course designed for individuals who need to facilitate groups to drive results.

- Understand how to structure effective agendas and conduct pre-work to set up for success
- Explore methods to productively address group and individual dynamics
- Learn different approaches to keep groups on track and focused
- Support a group wrestling with adversity or very difficult issues
- Become more aware of your facilitation approach and areas for improvement
- Practice facilitating in a range of situations and receive feedback

The focus of the course will be honing facilitation skills for advanced applications, such as an important committee meeting, task force, or senior team retreat. Individuals will supply example situations relevant to their own circumstances to apply the group’s wisdom to facilitation challenges. Also covered are how to address different learning and communication styles, barriers to effective decisions, and differentiation between process and content. The course can be customized to meet the needs of a specific facilitation situation.

Participants are provided with a course workbook containing worksheets and reference material. Additional Ancillary Supplies and/or Services may be suggested, depending on the objectives of the ordering agency and could include TTI Success Insights DISC Behavioral Assessment, Adversity Quotient® Online Profile, and/or Real Deal™ card deck.

Customized Training

Integrated Work collaborates with U.S. Government clients to design and deliver customized professional, team, and organizational development training programs. During these courses, a variety of topics can be covered including:

- Effective Communication
- Strategic Thinking
- Developmental Coaching and Constructive Feedback
- Establishing Trust and Collaboration
- Running Effective Meetings

Customized training is delivered based on the hourly rates for design and delivery.

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Adversity Advantage Toolkit

GSA Rate: $221.66 per person

The Adversity Advantage Toolkit provides a comprehensive set of tools to support participants’ learning regardless of their specific learning style. This toolkit is used with participants of resilience and change management services. It includes the following:

**Enrollment in the online 90-day Reinforcement Challenge** – To strengthen and sustain integration and learning of Adversity Quotient tools and principles, recipients of this support product are enrolled in an online skill-building program consisting of 10 interactive sessions requiring only 5-15 minutes of one’s time per session over a 90-day period of time. These sessions are self-directed and pace is monitored by Integrated Work staff who can send reminders and encouragement to support completion. At the conclusion of the sessions, individuals have the opportunity to complete an online re-assessment of their AQ Profile to gauge the extent of improvement.

**AQ Kitbag** – Complete set of materials, hands-on exercises, and resources used to assess and strengthen an individual’s mindset and response to challenges and adversity. It includes:

- AQ Profile assessment – hard-copy version
- Course Workbook – including interactive exercises, journal, and follow-up activities to support learning
- Real Deal card deck – used as a tool to clarify what matters most to participants, strengthen engagement and energy, improve relationships, better align motivators among team members, and reduce destructive conflicts and misunderstandings
- The Adversity Advantage, a best-selling book by Dr. Paul G. Stoltz and Erik Weihenmayer
- Thriving on the Edge commuter audio CD to reinforce learning
- AQ Wallet Card - a quick reference for tools provided in the course

Adversity Quotient® Online Profile, Development Version 8.1

GSA Rate: $48.86 per person

The Adversity Quotient® Online Profile, or AQ Profile, measures your hardwired pattern of response to life’s events. Strengthen your AQ and your chances for success improve—it’s that simple. Currently, organizations across all industries and cultures use AQ to equip their people, leaders, and stakeholders during adversity-rich times. For use in conjunction with coaching and training services.
TTI Success Insights Report: DISC Behavioral Assessment

GSA Rate: $38.29 per person

The TTI Success Insights® DISC Behavior Report not only clarifies team dynamics, but also guides team members to leverage behavioral knowledge for increased success. By understanding the keys to communicating with others based on behavioral styles, team members can become more effective and increase overall productivity. The results of the team report, in conjunction with review by a certified professional behavioral analyst will identify each team member’s strengths to ensure everyone is positioned to contribute to team success at their fullest potential. The results of TTI’s Team Behavioral Report assessment reveal an individual’s high and low placement in each of the four dimensions that make up their unique natural and adapted behavior styles. This information is reviewed in a group or individual setting to obtain insights on behavior style, areas for improvement, as well as potential communication challenges and how to overcome them. This support product is used in conjunction with training, coaching, facilitation, and consulting services.

Adversity Quotient Online Screening Profile

GSA Rate: $43.98 per person

The Adversity Quotient® Online Screening Profile helps organizations hire the best, most resilient people by predicting an applicant’s resilience—one’s capacity to respond constructively to adversity. Screening applicants with the AQ Profile® is easy and quick; it takes only 8 to 10 minutes to predict how applicants are likely to perform in a job that is rife with change, uncertainty, or adversity. This tool is designed to enhance, not replace, current approaches to applicant screening.

Real Deal™ Cards

GSA Rate: $17.73 per person

The Real Deal card deck is used as a tool to clarify what matters most to you, strengthen your engagement and energy, improve your relationships, better align motivators among team members, and reduce destructive conflicts and misunderstandings within organizations.
Labor Category Descriptions

Executive Coach
Responsibility: Provides one-on-one Executive Coaching Sessions to achieve desired results for the customer and his or her organization. Works closely with the executives or upper management of an organization to help identify strengths and weaknesses, and ultimately optimize the individual’s performance and leadership. Examples of the results that can be achieved with an Executive Coach are developing strategic plans for high-priority issues, strengthening organizational skills, improving team performance, establishing greater credibility, creating better focus on important priorities, creating balance between work and personal life, improving interpersonal communication skills, setting effective goals, and ensuring implementation.

Years of Experience: 15 years; 5 years experience in executive and upper management coaching

Education Requirements: Master’s Degree, formal training or certification in coaching or leadership development

Subject Matter Expert
Responsibility: Senior expert with extensive knowledge and experience in one or more designated fields or disciplines. Provides technical expertise and guidance to individuals and team to fulfill specific government requirements. Consults with or advises program/project manager, senior client leadership, or teams to meet objectives of complex efforts or to present on topics specific to their area of expertise as a portion of a project or program.

Years of Experience: 8 years in area of expertise

Education Requirements: Master’s Degree, formal training, or certification in designated field of expertise

Senior Consultant
Responsibility: Senior Consultants exhibit a deep and wide knowledge of consulting and training strategies for adult learners. They exercise an ability to balance the use of both hard and soft skills in the midst of client activities. They translate their insights into an approach that employs the client’s vocabulary. Clients look to them for leadership and appreciate their collaborative and respectful sharing of power. Consistently performs to the highest standards with clients at the senior executive level, delivering outstanding value in a wide range of circumstances. Provides high-level strategic guidance on meeting client requirements, budgetary and contractual matters. Manages contractual relationships with agencies and departments through organizational and business improvement services. Maintains productive and effective client relationship at the most senior levels of the client organization. Provides expert-level knowledge in planning, design, and facilitation of sessions, meetings, conferences or special events with multiple levels within a client organization. Brings together teams in collaboration efforts, working groups, or integrated self-directed teams. Gathers data to assess client needs and objectives. Defines and refines an agenda, communicates project goals, and selects appropriate tools and techniques. Excellent communication and negotiation skills.

Years of Experience: 10 years, 3 years experience in management consulting or business management

Education Requirements: Bachelor’s Degree, formal training or certifications in management, leadership development, psychology, human resources, organizational development or similar field.
**Facilitator/Trainer/Coach**

*Responsibility:* Designs, plans, and delivers facilitation or group facilitation, individual coaching, and customized or off-the-shelf training courses. Collects data to assess organizational challenges, opportunities, and threats as perceived by key stakeholders. Conducts interviews with stakeholders as well as a logical examination of documentation and other information to obtain a thorough understanding of the issues. Communicates information regarding themes and data analysis to the project team. Experienced in planning, design, and facilitation of sessions, meetings, conferences, or special events with multiple levels within a client organization. Brings together teams in collaboration efforts, working groups, or peer groups across multiple organizations, such as for peer learning team programs. Provides classroom and workshop training and facilitation that include program development, instruction, and administration. Highly competent in a wide range of programs and services in the area of leadership training, executive development, assessment results interpretation and delivery, and managerial assessment for managers and senior level executives. Assists in development of custom programs as required for a variety of innovative leadership development products including conferences, videos, and online leadership development programs.

*Years of Experience:* 5 years experience in field of expertise

*Education Requirements:* Bachelor’s degree, experience in preparing and conducting training programs for employees of commercial services or government organizations; formal training or certification in degree and/or certifications in adult learning, facilitation, leadership development, psychology, human resources, organizational development, or similar field.

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**Program Manager**

*Responsibility:* Provides administrative oversight and executive level management of multi-faceted contracts involving numerous projects and teams, over the entire contract effort. Acts as the primary interface and point of contact with Government project authorities and representatives on technical and contract administration issues. Responsible for ensuring senior level management within the client organization is aware of overall program status, including all relevant projects and their potential impact on higher level organizational strategic vision. Manages and controls financial and administrative aspects of the project with respect to contract requirements, enforces work standards, and assigns schedules. Effectively manages funds, personnel, production standards, and resources and ensures quality and timely delivery of all contractual items.

*Years of Experience:* 8 years of specialized experience in the business area of responsibility. Significant business experience at an executive or leadership level.

*Education Requirements:* Bachelor’s Degree in Business, Operations Management, Organizational Leadership, Communications, or Psychology

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**Team Leader**

*Responsibility:* Provides leadership of program participant teams under supervision of Program Manager. Interacts regularly with participants of teams, to build relationships, gather input, conduct needs assessments, and manage the overall team dynamics. Develops agendas, summary reports, and other materials for team events and interactions. Ensures data collection and tracking for participants details. Identifies and communicates team issues or risks to and Program Managers. Completes research and summarizes information and recruits and engages subject matter experts to present on topics relevant to team’s needs. Maintains database of program participation and deliverables.

*Years of Experience:* 3 years experience leading project teams

*Education Requirements:* Bachelor’s Degree
**Functional Analyst**

*Responsibility:* Responsible for the analysis of processes, organizational challenges, assessment data, and procedures. Leads the application of analytic techniques to evaluate organizational and individual effectiveness, program results, employee engagement, and/or performance, and human resources functions; including the development of assessment models, analysis of results, and development of tracking mechanisms and reports to be used by senior staff in client delivery. Provides statistical analysis as needed to evaluate program or project outcomes. Makes recommendations to program managers and senior consultants regarding ways to use data and analysis to support government objectives.

*Years of Experience:* 5 years in area of specialty

*Education Requirements:* Bachelor’s Degree

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**Contract/Proposal Manager**

*Responsibility:* Develops and monitors contract and project budgets, ensures compliance with all contractual and technical obligations, and prepares reports for Government contracting personnel and senior staff. Manages project expenses, ensuring compliance with Federal regulations. Monitors resource allocation, including subcontractor management, across multiple projects. Serves as liaison between client delivery and accounting staff. Identifies and proposes solutions to issues impacting contract performance. Responsible for government delivery/task order proposals and IDIQ bid development, ensuring compliance with RFP/IDIQ requirements, and focusing on meeting client’s needs as specified in the statement of work. Ensures that proposal development timelines and budgets are established and proposal development process is followed.

*Years of Experience:* 4 years related experience

*Education Requirements:* Bachelor’s Degree, formal training, or certification relevant to areas of responsibility

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**Project Manager**

*Functional Responsibility:* Ensures the high-quality delivery of services within customer timeframe and cost parameters. Responsible for managing project plans for client engagements and reporting project budget, allocating resources, and ensuring that team members have the resources they need to complete their work. Serves as the primary customer interface to report project status and schedule. Required to have strategic partnership with client to ensure satisfaction and operational excellence. Duties include participation in project design and development of project plans, communications to stakeholders and facilitating collaboration between different organizations involved in the project. Organizes and maintains all project information and oversees project coordination. Generates and reviews materials and reports to ensure high quality. Communicates regularly with project staff and customers about progress, timeframes, and due dates.

*Years of Experience:* 3 years related experience

*Education Requirements:* Bachelor’s Degree, formal training, or certification in project leadership and management, group dynamics or communication skills
Project Coordinator

**Responsibility:** Provides overall project coordination including scheduling, project planning, and budget tracking. Provides support to senior technical staff in the development of materials, reports, agendas, and background research. Prepares material including handouts, completion certificates, and course critique forms. Provides graphical support services, creating charts, graphs, or tables for reports and presentations. Applies analytical skills to support process improvement. Coordinates the activities of other team members and ensures the work plan and staffing schedule is implemented. Tracks and batches issues from multiple sources on multiple projects for communication with manager or appropriate staff person. Tracks key project deliverables and supports their completion under the supervision of senior project staff.

*Years of Experience:* 3 years experience in supporting project teams

*Education Requirements:* Associate’s Degree, Advanced knowledge of MS Office Suite, customer relationship management software, and Windows/Mac systems operations

Project Assistant

**Responsibility:** Provides standard to advanced administrative and project support services to a group of professionals or management personnel, including scheduling, transcription, data entry, and materials production. Some work may be of a proprietary or confidential nature. Requires moderate to advanced secretarial, administrative skills, and may require some decisions based upon independent judgment.

*Years of Experience:* 2 years secretarial or administrative office experience.

*Education Requirements:* High School or equivalent required. Some college preferred.

Experience and Education Equivalencies

**Substitution of Education for Experience:**

- A Bachelor’s degree may be substituted for three years of general or specialized experience.
- A Master’s degree may be substituted for four years of general or specialized experience.
- Formal accreditation or certification in an area related to the statement of work may be substituted for two years of experience.

**Substitution of Experience for Education:**

The experience may be substituted for the minimal degree depending on the number of years and nature of experience. Five years of general and specialized experience may be substituted for the next degree. Substitution requirements must be met for each position with required educational requirements. The allowable substitutions are as follows:

- High School Diploma plus four years equals Associate’s Degree
- High School Diploma plus eight years equals Bachelor’s Degree
- Bachelor’s Degree plus five years equals Master’s Degree