
OKA (Otto Kroeger Associates)
3605 Chain Bridge Road | Fairfax, VA 22030
(703) 591-6284 | www.typpetalk.com



General Services Administration - Federal Supply Services
Mission Oriented Business Integrated Services (MOBIS)

OKA Catalog

Contract Number: GS-10F-0015R

Modification PA-0003

October 1, 2004 – September 30, 2014

OKA (Otto Kroeger Associates) is pleased to present this catalog for our prime contract with General Services Administration (GSA) Federal Supply Services (FSS). We hold a Management, Organizational, and Business Improvement Services (MOBIS) Schedule, covering Consulting Services (SIN 874-1), Facilitation Services (SIN 874-2), and Training Services (SIN 874-4).

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

MOBIS Contract Information

OKA Contact Information:

Hile Rutledge
Chief Executive Officer
3605 Chain Bridge Road
Fairfax, VA 22030
Phone: 703 591-6284
E-Mail: hrutledge@typpetalk.com

Government Point of Contact:

Ryan Sugiyama
Contract Specialist
U.S. General Services Administration FAS
Management Services Center
Phone: (253) 931-7234
E-Mail: ryan.sugiyama@gsa.gov

Other Contract Details:

- Prompt Payment Discount Terms: 1% - 20 days, net 30 days
- The award for the labor categories is predicated on a commercial basis.
- The Government prices are inclusive of GSA's 0.75 % Industrial Funding Fee (IFF).
- The prices offered are firm, fixed-price, FOB destination for a contract period from date of award for five years, with three five-year options.
- Order Limitations: Minimum/Maximum - \$300/\$1,000,000
- Scope of Contract: Domestic delivery with delivery time to be specified on each task order.
- Other Direct Costs (ODCs) will be listed as separate line items and identified as "open market charges." The task-ordering official will negotiate these when the task order is issued. When ODCs are valued over \$2,500, all pertinent acquisition regulations must be followed.

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 with a variety of psychological instruments and group processes, OKA has earned a reputation for engaging, high impact training events. We train more than 500 people a year at our full-service training facility in Fairfax, VA, and regularly conduct single day and multi-day customized workshops for government and commercial organizations across the country.

OKA also has deep experience in designing programs and training support materials that apply personality assessment instruments to better understand communication, leadership, and change in individual, teams, and full systems.

OKA originally built its reputation by presenting personality type and the Myers-Briggs Type Indicator (MBTI) assessment as a tool and a vocabulary that help unlock the complexities of communication, team dynamics, decision making and leadership. Today, we use a range of tools and approaches to meet a full range of organization development needs for both corporate and government clients operating in diverse environments. Our services include:

- Introductory self-awareness, leadership and team development workshops.
- Advanced applications training and teambuilding workshops in topics such as leadership, conflict management, communication, and team development.
- Workgroup and focus group facilitation.
- Strategic planning in both single workshop and full-scale project formats.
- Curriculum development for both classroom and online training programs. Organizational assessments, including social climate surveys.

OKA has been accredited as a training organization by the International Association for Continuing Education and Training (IACET) for more than a decade. We have also been 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 leaders have authored and produced a full line of type-related training support materials for consultants, trainers and individuals interested in personal and professional growth and exploration. These include training workbooks and videos, self-guided training modules on CD, and training support software.

OKA Corporate Summary

- Small business based in Fairfax, VA with an on-site training facility.
- Accredited by International Association for Continuing Education and Training.
- Qualified to deliver qualification-level training on more than ten validated personality and team assessments.
- Prime contractor with General Services Administration (GSA), holding a Management, Organizational, and Business Improvement Services (MOBIS) Schedule.

Our Approach to Consulting, Facilitation and Training

Three bedrock principles drive OKA's design and delivery of customized workshops:

- **Participant-Focused:** There is no “one right way” to manage a project, solve problems, or lead a team. While many trainers present cookbook approaches to these efforts, lasting success comes instead when these topics are framed from 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, we 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.

SIN 874-1: Consulting Services & SIN 874-2: Facilitation Services

OKA’s consulting and facilitation services include: curriculum development, leadership coaching, training program development, strategic planning, workgroup facilitation, organization assessments and general organization development consulting.

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

Curriculum Development and Leadership Coaching. For the U.S. Air Force, OKA developed and currently delivers a leadership development program with a group of 80-100 Military Training Instructors. This ongoing project, which began in 2005, has included a comprehensive assessment and gap analysis; in-depth project planning and evaluation; curriculum design; training development and delivery; and individualized leadership coaching.

Facilitation and Strategic Planning. Since January 2007, OKA has supported the USDA - Agricultural Marketing Service's ongoing strategic planning and employee development efforts. This has included facilitating strategic planning workshops for programs across AMS; contributing to the drafting of an agency-level level strategic plan; and working with agency leaders to plan out how strategic plans will be implemented and how progress against them will be assessed. OKA has also conducted training workshops and other multi-stakeholder partnership facilitation efforts with offices across AMS.

Organization Development Assessment. In early 2007, OKA completed an organization development assessment with the senior leadership team of one of the Smithsonian Institution's prominent Washington DC museums. Assessment activities included administering and interpreting a climate survey with a broad selection of employees; conducting interviews and focus groups with the museum's director and his leadership team 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. In early 2008, 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.

SIN 874-1 and SIN 874-2 Labor Categories

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.

Executive Associates/Consultants – are subject matter experts involved with the day to day client engagement and bring extensive professional and educational credentials and a minimum of 8 to 10 years experience in organization development and change management. These consultants have primary responsibility for the client engagement and have specialized areas of expertise in a range of organization development, human resources and change management topics, such as leadership development, communications and strategic planning, 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.

Project 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 – 8 years organizational development experience.

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 – 8 years experience.

Lead Associates/Consultants - are experienced consultants or practitioners with professional experience in specialized areas. These consultants have experience in developing training approaches, protocols and programs and designing strategic data collection methodologies and feedback systems. Responsibilities include managing, guiding, and mentoring team members regarding specific tools, events and deliverables and both developing and implementing detailed work plans. Lead Associates and Consultants have a minimum of a Bachelor's degree and bring with them 4 – 6 years experience.

Associates/Consultants – are consultants or practitioners with professional experience in specialized areas. These consultants implement specific training designs using prescribed tools and approaches and collect and summarize data through interviews, focus groups or surveys. Responsibilities include activities such as training, collecting data, writing reports and supporting team members. Associates and Consultants have a minimum of a Bachelor's degree and bring with them 3 – 5 years experience.

General Consultants – are organization development and change management consultants engaged in activities such as conducting focus groups, managing event logistics, conducting established training programs or other related activities. General Consultants bring to the client a Bachelor's degree supported by 2 – 3 years of general experience.

Administrative Assistants – provide an array of administrative support services, ranging from materials generation and preparation, graphics design and editing, general research, travel services and other general and routine work in support of engagement and deliverables. Administrative Assistants generally have Bachelor's degrees and/or 2 – 3 years targeted work experience directly related to their project assignment.

SIN 874-1 and SIN 874-2 Pricing

Consulting/Facilitation Rates	GSA Rates (Hourly)	GSA Rates (Daily)
Subject Matter Expert	\$302.88	\$2,423.08
Executive Associates/Consultants	\$216.35	\$1,730.77
Managers	\$173.08	\$1,384.62
Senior Associates/Consultants	\$155.77	\$1,246.15
Lead Associates/Consultants	\$129.81	\$1,038.46
Associates/Consultants	\$103.85	\$830.77
General Consultants	\$77.88	\$623.08
Administrative Assistants	\$60.58	\$484.62

Revised: September 2009

SIN 874-4: Training Services

OKA holds deep expertise in designing and delivering customized interpersonal, team, and leadership development training modules. Here, we list examples of recently delivered workshops with a range of government and commercial clients. Many of this workshops fall within the Customized Workshop Item on our Schedule.

Interpersonal Skills: Self-Awareness and Communication. OKA is frequently called upon to deliver introductory self-awareness workshops, often using a personality assessment tool such as the MBTI, the Strength Deployment Inventory (SDI), Reversal Theory, or the Leadership Spectrum Profile (LSP). The overall objectives of these events are to understand and access different personality preferences for better self management; to understand others' styles in order to communicate, lead, and follow more effectively; and to immediately apply this knowledge to tackle an issue or problem at hand.

Understanding Team Dynamics: Team Tools. This is a team development workshop that “teaches through experience,” using a design that balances experiential learning with theory instruction, application guidance, and action planning. Our approach is to have the group experience their own dynamics as a team in a teambuilding exercise. This is followed by a discussion about what happened during the exercise – discussing what participants might observe in their teams “back at the office.” These experiences are supplemented with the introduction of team theories and models that help participants generalize the learning for application to future situations. We close with action planning with the group.

Leadership Communication: Having Difficult Conversations. This workshop provides a formal feedback model and experiential exercises related to giving feedback to others. This workshop can be framed to support those planning for formal performance assessment sessions, or, as a skills development session for managers and staff members who must regularly have a range of honest and sometimes challenging conversations with direct reports, peers, and senior leaders.

Influencing and Negotiation Skills. Leaders and employees at all levels of an organization must work to influence others, using both formal and informal power. This workshop provides systematic approaches and action steps for first understanding what another person might need and be motivated by, and then taking action to influence that person in a way that supports near-term and long-term goals.

Leadership Communication: Driving Change. From encouraging innovation and creative customer service among teams, to serving at the leading edge of an organizational change initiative, employees at all levels are frequently asked to lead both internal and external partners down new and uncertain paths. Through hands-on experiential activities, this workshop focuses on a range of topics related to innovation and change. This class includes two change and motivational models that can be immediately applied to the various stages of change. With small group work, individual exercises and case studies, the class includes practice on crafting communication for each stage of the change process and a detailed action plan.

Understanding and Navigating Conflict. There is no tool or underlying theory that deals with conflict and its implications and management with any more focus or facility than the SDI (Strength Deployment Inventory) based on Elias Porter's Relationship Awareness Theory. This tool allows participants to identify their own motivational styles both when things are going well and when they are in conflict—laying out a road map for both understanding and then addressing that conflict. With a whole suite of tools to support the complete application of this theory, the SDI is a compelling training and development option that we increasingly use for both self-awareness and conflict management in groups.

Consulting Skills. OKA has designed both classroom and self-guided training in consulting skills. The central model for this training is OKA's Wrapped Cable Model, a diagnostic tool designed to provide a guiding structure for systematically evaluating a number of distinct, yet interdependent, elements impacting any organization or system. The model consists of seven core elements contained within a defining shell, which represents the eighth element of culture. When we teach other how to use the Cable Model, we empower them to systematically review and then intervene to understand and impact the myriad of factors and interdependencies that lie below the surface of any system.

Introduction to Type and Project Management. Training in project management principles and tools is becoming increasingly popular. Despite the advancements in project management processes and models, though, many experienced project managers agree that the people side of project management – communication, task prioritization, conflict management, and stakeholder management – remain the most important, and the most challenging tasks. With this in mind, this class uses the tool of personality type to explore assessment approaches and best practices for project management.

Critical Thinking and Decision Making. Gathering and processing information effectively, and then effectively acting on that information, are two critical activities in your work life. Effective critical thinking and subsequent effective decision making are what make these activities successful. How do you identify the root causes that lie beneath multiple events? How can you transfer past insights into future contexts? How do you unearth unspoken assumptions? How do you develop effective evaluation criteria, and then weigh options against them? In this workshop, we will explore what it means to think critically, and present and practice a model for effective decision-making based on that thinking.

Strategic Planning. Too often, both managers and technical specialists become so consumed by the requirements of today that they fail to pause to analyze the root causes of the challenges that surround them and look ahead to the future of the organization. This workshop is a hands-on design that combines the teaching of a strategic planning approach with the hands-on implementation of that approach in a working session with the team.

SIN 874-4 Pricing

Training Classes	GSA Rate (Per Class)	Assumption	Materials (Per Person)
Team Tools - 2 Days	\$ 6,600	20 people	\$ 50
Standard Application Workshop - 1 Day	\$ 3,550	25 people	\$ 30
Customized Application Workshop - 1 Day	\$ 4,650	25 people	\$ 50
Experiential Workshop - 1 Day	\$ 3,100	30 people	\$ 10

Updated: September 2009