

LYNNE CARBONE & ASSOCIATES, INC.

Organization & Management Consulting Services

GSA Professional Service Schedule: GS-10F-0096L



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GENERAL SERVICES ADMINISTRATION

Federal Supply Service *Authorized Federal Supply Schedule Pricelist*

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

Professional Services Schedule
Industrial Group: 00CORP
FSC Class: 874

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

Contract Number: GS-10F-0096L

Contract Period: December 1, 2015 through November 30, 2020

Contractor: Lynne Carbone & Associates, Inc.
Contract Administrator: Lynne Carbone, President

Business Size: Small
Business Type: Woman-Owned

DUN's Number: 042563259

Address: 7910 Woodmont Avenue, Suite 1140
Bethesda, MD 20814

Telephone: 301-986-0033
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E-mail: LCarbone@LynneCarbone.com
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CUSTOMER INFORMATION

- 1a. Table of Awarded Special Item Number(s) Sin's with appropriate cross-reference to page number(s). (Attach separate sheet if necessary).**

SIN's 874-1, 874-1RC, 874-4, and 874-4RC

- 1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded. (Attach separate sheet if necessary).**

See attached pricelist.

- 2. Maximum Order Limitation: \$1,000,000.00**

- 3. Minimum Order: \$100.00**

- 4. Geographic Coverage (Delivery Area):** Domestic Delivery only.

- 5. Point(s) of Production (city, county, and state or foreign country):** Same as Contractor.

- 6. Discount from list prices or statement of net price:** Prices shown on attached price list are net prices with discount included.

- 7. Quantity discounts:** Already included in net pricing, per attached Price List.

- 8. Prompt payment terms:** 1% 15 days, Net 30 Days

- 9a. Notification that Government purchase cards are accepted below the micropurchase threshold:** Accepted

- 9b. Notification whether Government purchase cards are accepted or not accepted above the micropurchase threshold:** Accepted

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

- 11a. Time of Delivery:** As specified on Individual/Task order.

- 11b. Expedited Delivery:**

- 11c. Overnight and 2-day delivery:** Contact Contractor for rates for overnight and 2-day delivery.

- 11d. Urgent Requirements:** Contact the Contractor's representative to effect a faster delivery.

CUSTOMER INFORMATION

12. **FOB Point(s):** Destination
13. **Ordering Address(es):** Same as Contractor
14. **Payment Address(es):** Same as Contractor
15. **Warranty provision:** Product warranty terms and conditions are those set forth in contract clause 552.246-73.
16. **Export Packing Charges, if applicable:**
17. **Terms and conditions of Government commercial credit card acceptance (any thresholds above the micropurchase level):** N/A
18. **Terms and conditions of rental, maintenance, and repair:** N/A
19. **Terms and conditions of installation:** N/A
20. **Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices:** N/A
- 20a. **Terms and conditions for any other services:** N/A
21. **List of service and distribution points:** N/A
22. **List of participating dealers:** N/A
23. **Preventive maintenance:** N/A
24. **Year 2000 (Y2K) compliant.**
25. **Environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants).**
26. **Data Universal Number System (DUNS) number:** 042563259
27. **Notification regarding registration in Central Contractor Registration (CCR) database:** Registered.

GSA GOVERNMENT RATES

Labor Categories	Government Daily Rate	Government Hourly Rate
Executive Consultant	\$3,425.69	\$428.21
Senior Consultant	\$3,112.18	\$389.02
1 st Associate Consultant	\$2,693.28	\$336.66
2 nd Associate Consultant	\$2,244.40	\$280.55
3 rd Associate Consultant	\$1,795.52	\$224.44
4 th Associate Consultant	\$1,496.24	\$187.03
Lead Computer Support	\$48.50/hour	

Large scale training programs or conferences may include an additional materials charge, generally reflecting the cost of materials.

Travel time is charged @ 50% labor rates for consultants; 100% for Computer and Administrative Support.

Travel and associated expenses are additional charges.

The Service Contract Act (SCA) is applicable to this contract as it applies to the entire Professional Services 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 wage determination number. Failure to do so may result in cancellation of the contract.

SUMMARY OF SERVICES AVAILABLE

Strategic & Annual Planning

- Tailored and relevant emerging trends
- Pre-work (business cases, articles)
- Soliciting and synthesizing input from employees and stakeholders
- Off-site facilitation
- Post session report preparation and debrief of observations
- Follow-up execution planning
- Annual updates (optional)

Organizational Assessment

- Internal Assessments (customized)
- Satisfaction Surveys (employee, customer)
- 360° Feedback Surveys

Organization Change & Change Management

- Organization structure change and implementation support
- Process and system redesign
- Culture change
- Mergers and Acquisitions – Transition Management

Strategy Development & Issue Management

- Collaborative problem-solving approach
- Decision management
- Action planning and management

Conference and Workshop Design & Facilitation

- Design
- On-site facilitation and strategy development
- Executive coaching and leader support (talking points, presentations)

Leadership Development & Executive Coaching

- Transition planning and management
- Executive coaching (leadership/management)
- Skill development
- Issue/strategy development

Organization & Team Development

- Intra-teambuilding (new team formation, teams with issue-focused challenges, teams with problems)
- Cross-teambuilding
- Cross culture sharing and team development
- MBTI-based teambuilding

Environmental Science & Policy

- Science strategy and planning
- Policy analysis
- Environmental assessments
- Technical writing
- Outreach and communications products
- Interface/facilitator between government & industry

Training & Mini-Workshop Series

- Accountability
- Being Effective in a Constant State of Change
- Conflict Management
- Customer Service
- Workplace Diversity
- Effective Communications
- Effective Meetings and Processes
- Knowledge Transfer and Succession Planning
- Leadership Can Be Learned
- Strategic Marketing and Communications
- Innovation
- Emotional Intelligence
- Soft Skills for Leaders
- Leadership Development
- Team Lead Training
- Strategic Leadership

DESCRIPTION OF SERVICES AVAILABLE

Facilitation Services covers a wide range of organization and management services. All processes are tailored to address the unique needs of each client. Some of the most frequently requested and utilized services by LCA's clients include:

STRATEGIC PLANNING: A two day rigorous session which results in a 3-5 year strategic plan and 1 year action plan reflecting priorities. LCA's consensus based decision process brings the group through exploration of opportunities and threats; assessment of current state against future desired state; articulation of mission vision, customers, partners, stakeholders, and articulation of 3-5 year outcomes, strategies and tactics. Year one priorities are determined and "fleshed out" in what, who, why, and by when terms.

IMPLEMENTATION PLANNING: The details needed to execute a strategic plan are developed using a process of setting priorities and delineating the tactics and activities necessary to achieve a strategic goal and objective. Participants walk away with a prioritized action plan outlining what, who, how, by when, and why. Performance metrics are built into the articulation of the required outputs.

STRATEGY DEVELOPMENT/ISSUE RESOLUTION: Many clients have utilized LCA Inc.'s expertise to address focused issues resulting in clear, concise strategies, actions, and accountabilities. The consultant's expertise is tapped to develop a tailored process and materials to facilitate a consensus based group process to achieve critical results on a focused issue or set of issues.

ORGANIZATION ASSESSMENT: Periodically, it's important to assess where an organization or team is in its day to day operation or development process. LCA, Inc. tailors the approach with the client to provide an independent assessment of the organization or the team's status. The process may include focus groups, interviews, or employee surveys. The result is a report of the status of the organization against the agreed upon parameters and recommendations on how to address the results.

ORGANIZATION AND SYSTEM DESIGN: LCA's expertise in organization and system design may be tapped to facilitate the development and execution of a redesign of an organization's structure or processes. Consultants design and facilitate a process to support teams exploring options and costs/benefits to reorganizing or reinventing its systems and processes. LCA Consultants offer both content and process support in these activities. Experience and sharing of best practices from other government organizations or private sector successes are key to this support.

TEAM DEVELOPMENT: Team building activities are designed to meet the needs and desired outcomes of the client. The manager defines what he/she wants to achieve as a result of a team development activity and LCA, Inc. proposes a design, process, and expected output.

MEETING FACILITATION: The most basic service offered by LCA, Inc. is meeting facilitation. Consultants design and facilitate meetings of any length and include as part of the service specialized materials, name tents/badges, power point presentations, on site documentation of results, and a final report. There are various levels of expertise and specialties on the LCA, Inc. team, which are recommended, based on the group and desired results.

DESCRIPTION OF SERVICES AVAILABLE

CONFERENCES, WORKSHOPS AND USER FORUMS: LCA, Inc. has a track record for designing and delivering large scale conferences, workshops, or constituent meetings to meet a wide range of desired objectives. Depending on size and scale, multiple consultants may be used for an event. All materials are tailored for the event to achieve the client's articulated desired results.

EXECUTIVE COACHING/LEADERSHIP DEVELOPMENT: A less well known, but frequently utilized LCA service is one-on-one coaching and mentoring. LCA, Inc. consultants are generally name requested and provide leaders at many levels with individual coaching, strategy support, and professional development. Executive Coaching is highly individualized and covers a wide range of topics, which are either planned or evolve over the period of consulting support. Managers generally elect to have 3-4 hour modules of coaching on a monthly or bimonthly basis. There is no menu to select from for this service. It is planned and tailored to meet the Leader's professional development objectives.

PROJECT/PROGRAM MANAGEMENT DEVELOPMENT AND SUPPORT: Effectively managing and supporting programs and projects is complex. LCA team members provide their clients with systems support consultation in the design and development of program or project management systems and activities to meet the organization's overall management needs. A systems approach is utilized as the basis for this facilitation service. It is a highly tailored activity using a collaborative approach between consultants and client.

ORGANIZATION DEVELOPMENT: LCA, Inc. offers tailored services in building and supporting programs for organizations in the following areas:

- ✓ 360° Managerial Assessment Survey and Feedback System
- ✓ Succession Planning
- ✓ Career Development and Life Planning
- ✓ Team Development Using Meyers-Briggs Type Indicator
- ✓ Performance Management and Feedback Processes

PROFESSIONAL DEVELOPMENT/TRAINING: Half day and full day training modules are available "off the shelf" and/or tailored to meet the Client's specific needs. They include:

- | | |
|---|--|
| ✓ Accountability | ✓ Leadership Can Be Learned |
| ✓ Being Effective in a Constant State of Change | ✓ Strategic Marketing and Communications |
| ✓ Conflict Management | ✓ Innovation |
| ✓ Customer Service | ✓ Emotional Intelligence |
| ✓ Workplace Diversity | ✓ Soft Skills for Leaders |
| ✓ Effective Communications | ✓ Leadership Development |
| ✓ Effective Meetings and Processes | ✓ Team Lead Training |
| ✓ Knowledge Transfer and Succession Planning | ✓ Strategic Leadership |

LABOR CATEGORIES

LABOR CATEGORY TITLE: EXECUTIVE CONSULTANT

DUTIES/RESPONSIBILITIES

- Provides expert organization, management or technical advice, training, facilitation and/or consultation to individual executives or teams.
- Provides expert knowledge and applications in technical area of expertise and/or organization development, organization design, group dynamics, leadership/executive development and strategic/business planning or technical field of expertise.
- Administers surveys, assessments and produces analyses and produces reports.
- Customize, design and delivers organizational interventions and/or provides expert advice and consultation.

MINIMUM EDUCATION REQUIREMENTS

- Masters level in Business, Public Administration or technical field.

MINIMUM EXPERIENCE

- 15 years in consulting field or equivalent technical or managerial positions in Business or Public Administration.

LABOR CATEGORY TITLE: SENIOR CONSULTANT

DUTIES/RESPONSIBILITIES OF THE POSITION

- Provides technical expert knowledge, training, facilitation and applications in specialized field and/or in organization development, organization design, group dynamics, leadership/executive development and strategic/business planning.
- Administers surveys, assessments and produces analyses and produces reports.
- Develops and delivers tailored products and/or consultation in technical field of expertise.

MINIMUM EDUCATIONAL REQUIREMENTS

- Master's degree in Business, Public Administration or specialized field in which providing consultation.

MINIMUM EXPERIENCE REQUIREMENTS

- 10 years of experience in the specialized field.

LABOR CATEGORY TITLE: 1ST ASSOCIATE CONSULTANT

DUTIES/RESPONSIBILITIES OF THE POSITION

- Provides expert organization, management or technical advice, training, facilitation and/or consultation.
- Provides specific content knowledge, consultation and guidance in technical area of expertise or leadership development, organization change, strategic planning and project management.
- Administers surveys, assessments and produces analyses and produces reports.
- Conducts training in technical area of expertise and/or leadership/management development.

MINIMUM EDUCATIONAL REQUIREMENTS

- Master's degree in Business, Management, Public Administration, Education, Psychology or related development field.

MINIMUM EXPERIENCE REQUIREMENTS

- 7 years of experience in the technical field of expertise or related management position.

LABOR CATEGORIES

LABOR CATEGORY TITLE: 2ND ASSOCIATE CONSULTANT

DUTIES/RESPONSIBILITIES OF THE POSITION

- Provides expert organization, management or technical advice, training and/or consultation
- Provides specific content knowledge, consultation and guidance in technical area of expertise or leadership development, organization change, strategic planning and project management.
- Designs and facilitates processes.
- Administers surveys and assessments, and produces analyses and produces reports.
- Provides specific content knowledge, consultation and guidance in technical area of expertise or leadership development, organization change, strategic planning and project management.

MINIMUM EDUCATIONAL REQUIREMENTS

- Master's degree in Business, Management, Education, Psychology or technical field of expertise.

MINIMUM EXPERIENCE REQUIREMENTS

- 5 years of experience in the technical field of expertise or organization and management/leadership development or related managerial position.

LABOR CATEGORY TITLE: 3RD ASSOCIATE CONSULTANT

DUTIES/RESPONSIBILITIES OF THE POSITION

- Provides expert organization, management or technical advice, training and/or consultation
- Provides specific content knowledge, consultation and guidance in technical area of expertise or leadership development, organization change, strategic planning and project management.
- Designs and conducts training in technical area of expertise, leadership, management or team work.

MINIMUM EDUCATIONAL REQUIREMENTS

- Master's degree in Business, Management, Education, Psychology or related development field.

MINIMUM EXPERIENCE

- 3 years of experience in the field of expertise or equivalent managerial position

LABOR CATEGORY TITLE: 4TH ASSOCIATE CONSULTANT

DUTIES/RESPONSIBILITIES OF THE POSITION

- Designs customized processes and conducts meeting facilitation.
- Consults in technical area of expertise or group dynamics, teambuilding and strategic planning.
- Provides technical advice, consultation, analyses and/or reports as required by client.
- Conducts workshops.
- Conducts surveys, organizational assessments, analyses and reports.
- Conducts training.

MINIMUM EDUCATIONAL REQUIREMENTS (SHOULD INCLUDE MINIMUM EDUCATION LEVEL)

- Bachelor degree in Business, Public Administration, or other Technical Field.

MINIMUM EXPERIENCE REQUIREMENTS

- 1 years' experience in organization, management development or other technical field.

ACCEPTABLE SUBSTITUTION

- A Master's degree in Business, Public Administration, Organization Development or related technical fields may be substituted for the experience requirement.

LABOR CATEGORIES

LABOR CATEGORY: LEAD COMPUTER SUPPORT

DUTIES/RESPONSIBILITIES OF THE POSITION

- Attends meetings to record documentation; compiles, transcribes and edits documentation.
- Oversees and supervises other laptop support personnel on site.
- Merges all other laptop products on site into a single product
- Reviews all documentation for accuracy.
- Creates and produces power point presentations, specialized workbooks, and all support materials.
- Creates and updates website materials.
- Edits documents.
- Serves as key interface with hotels, conference centers, and clients on event planning and management and support.
- Serves as Assistant to the Executive Consultant off site and in the office.

MINIMUM EDUCATIONAL REQUIREMENTS

- Bachelor's degree.

MINIMUM EXPERIENCE

- 1 year experience in a comparable position or proven competency in computers and application of Excel, MSWord, Power Point, computer graphics, desktop publishing.

LCA TEAM

LYNNE M. CARBONE

Lynne is President of Lynne Carbone & Associates, Inc., an organization and management consulting firm established in 1989 and based in Bethesda, Maryland. Ms. Carbone has been consulting to both public and private sectors since 1980. She began her consulting career in the Federal government as a Presidential Management Intern in 1980 and had staff and management assignments in four different agencies until 1989. She is bilingual in Spanish, has a B.A. in Spanish and Masters in Public Administration from American University.

Ms. Carbone has been an independent consultant since 1989 and is most known for her expertise in strategic and annual planning, organization assessment and redesign, teambuilding, executive coaching, strategy development and large workshop/conference design and management. Lynne Carbone's personal and company goal is to exceed client expectations and support each client's professional and organizational success.

LAURIE ALLEN

Laurie Allen joined the LCA team as a consultant in September 2014. Laurie has had a 20 year federal career in environmental science and policy, with additional experience in state and nonprofit sectors. She has a unique combination of organizational, policy and science training and experience, and the energy and enthusiasm needed to lead groups on a common journey to reach shared goals.

Laurie has facilitated meetings with stakeholders for strategic planning and regulatory applications, negotiated rulemaking processes from legislative mandate to implementing regulation, and has a depth of experience researching and writing technical support documentation, environmental planning, and analysis of regulatory requirements. She is currently a PhD candidate conducting research on the microbial ecology of mid Atlantic estuaries and has earned a Master of Public Administration and a Bachelor of Science in Wildlife and Fisheries Biology.

MARY GROSS

Mary Gross has extensive experience with leadership development, team dynamics, and managing change. She is currently a PhD candidate in Organizational Psychology at Rutgers University.

Among other esteemed prior experiences, Mary served as the Director of Leadership and Management Development at Bank of America; the Global Head of Learning and Development at Merrill Lynch Investment Managers; and the Director of Career Management Services at the Wharton MBA Executive Program.

LABOR CATEGORIES

ELEANOR LYONS

Eleanor joined the LCA team in 2014. With over 20 years of experience consulting on Leadership and Organization Development, Eleanor knows how to help leaders and organizations understand who they are, who they want to be, and how to develop their talents.

Over the past 7 years Eleanor has provided consulting, coaching and leadership training to various industries, including Manufacturing, Insurance, Technology, Utilities, Energy, Pharmaceutical, Financial Services, and Non-Profits. Her approach is to truly partner with client organizations, working closely with subject matter experts to determine desired outcomes and ensuring that solutions are customized to meet the business needs. She uses adult learning principles to design programs that will energize participants and create an open dialog for learning. Eleanor has been recognized for her exceptional facilitation skills at various workshops and strategic leadership off-sites.

Eleanor is currently enrolled in IPEC's Coach Certification program, with an expected completion date of September 2015. Eleanor also earned a Bachelor's degree in Human Resources from Temple University in Philadelphia.

DAVID BIDWELL

David Bidwell Joined LCA in June 2013 as a Strategy and Management Consultant. He has earned an MBA from American University, and is also a trained facilitator and administer of the MBTI program. While at LCA, David has successfully supported strategic planning and change management initiatives of a variety of different agencies, associations, and companies – ranging from environmental, to healthcare, to aerospace and defense.

SARA RALEY

Sara Raley earned her PhD in Sociology from the University of Maryland with an emphasis on demography and gender, work, and family.

Sara is a Professor of Sociology at McDaniel College in Maryland, and has been published in the Encyclopedia of Sociology, Annual Review of Sociology, and Contemporary Sociology, and more than dozen other journals and books for her research and work in the field. She brings a unique expertise to the LCA team, and has led a number of Diversity Training sessions and workshops this past year.

JANICE FLUG

Janice is an independent consultant specializing in Library, University and Association services. She brings over 30 years of library administration experience coupled with extensive service in University and Professional society leadership positions. Ms. Flug brings the LCA team a highly extensive experience particularly in financial management. She chaired several committees that oversee and advise financial management of Library, University and Associations, including American University, American Society for Public Administration, and Library Leadership and Management Association.

LABOR CATEGORIES

PHILLIP HELLER, PH.D

An Independent educator, applied social systems researcher and human resource development consultant, Phil has been working in adult education for 23 years. He holds a Ph.D in Education from Michigan State University. His academic specialization was in learning and problem solving and he has pursued training in group dynamics and communication training (T-Group, Tavistock, Empathy and Crisis Intervention, and Gestalt Therapy). He has published several articles on management and education. Philip has experience with human resource planning, restructuring, intergroup and interpersonal conflict resolution. He designs and facilitates management development workshops and team retreats. Phil has worked with LCA for more than 10 years and is based in Seattle, Washington.

NANCY RELLER

Nancy Reller joined LCA, Inc. in 2009. She brings expertise particularly with non-profit organizations in strategic communications, coalition building, meeting facilitation, and executive coaching. Her experience in the health care community for more than 25 years has included clients such as the Robert Wood Johnson Foundation, AARP, and The Institute for Healthcare Improvement.