

Sole-Source Justification using Simplified Procedures for Certain Commercial Items

In accordance with Federal Acquisition Regulation (FAR) 13.5

1. Agency and Contracting Activity.

This justification is prepared by the Small Business Administration, Office of Financial Operations & Acquisition Management, Acquisition Operations Division in conjunction with the Office of Inspector General (OIG).

2. Nature and/or description of the action being approved.

The government anticipates award of a Firm Fixed Price (FFP) sole source contract for building leadership capacity throughout the organization and increase the internal customer service focus of its support staff identified on requisition 2804000EQ02538. The anticipated contract type is Firm Fixed Price (FFP). This acquisition is restricted to the following source:

Company: The Ken Blanchard Companies ®

Company Address: 125 State Place, Escondido, CA 92029

Company Point of Contact and Phone Number: Russell Williams, Director, Client Solutions

Cell: (410) 336-8771, Office: (760) 489-5005 Ext. 5821

3. Description of Supplies or Services.

This requirement consists of procuring proprietary training to build leadership capacity throughout the organization to increase the internal customer service focus of its support staff by utilizing the techniques and guidance learned from the proprietary trainings. OIG seeks to offer these trainings to its workforce during its all-hands training conference, which is planned for the week of September 2022 conference and customized to the years thereafter (2023-2025). The training venue is being solicited within the confines of the downtown area of Universal, California.

OIG is promoting a culture of self-leadership principles within its organization. Both its supervisory and non-supervisory staff have been trained in the principals of situational leadership through a proprietary training offered by The Ken Blanchard Companies. Supervisory staff learned these principles through a course offering titled, SLII Experience (TM), and non-supervisory staff have been trained through a course offering titled Self Leadership (SELF). OIG also has existing, contracted access to the Blanchard Exchange Portal to manage the self-leadership training for its staff.

OIG is seeking an integrated and customized curriculum to build upon the SLII® and SELF training programs at its all-hands training conference. The programs' facilitator materials, participant materials, and online courses are the intellectual property of The Ken Blanchard Companies. OIG is seeking to enter into a sole-source agreement to obtain the aforementioned curriculum to build trust necessary to advance self-leadership, to gain an increased understanding of the principles of self-leadership within the Blanchard model, to align self-leadership with existing OIG business processes within its three Divisions, and to increase the internal customer service focus utilizing the self-leadership principles for its support functions.

The below table is an overview of trainings that will be provided during the OIG conference from September 11 through the 19th 2022. The type of trainings being offered on the option years will build upon the below training material to ensure the training material offered is not duplicative.

Description	Course
Customer Experience	Learn about Legendary Service ® CARE model to encourage a service minded culture for both internal and external customers.
Ground & Grow	Kick off with senior leader to restart the vision, share how his personal purpose and values connects to SBA OIG's purpose and values Keynote on promoting a focus of Servant Leadership and how return to your personal purpose and mission Self Leadership Mindsets (Challenge Assumed Constraints, Be Proactive, Points of Power)
Inspire & Activate	Building Trust to Accelerate Better Conversations and Relationships Self Leadership Skillsets (Goal Setting, Diagnosing, Matching)
Reflect & Prioritize	Debrief of Self-Assessment/Emotional Capital Report (completed in advance) and action planning based on Self Leadership and Trust Creation of experience map / team charter for each regional or functional team: purpose, goals, values, norms, practices (complete fully after event)
Breakthrough	Awareness of Your Emotional Triggers (high level version of Conversational Capacity®) Helping Hands Team Activity

This requirement is estimated to cost \$559,199.17 and is required to be performed in September on an annual basis. This estimated cost is based on a base period and three (3) 1-year option periods

4. Statutory Authority.

Simplified procedures for certain commercial items in accordance with FAR 13.5 and 41 U.S.C. 1901.

5. A statement demonstrating the unique qualifications of the proposed contractor or the nature of the action requiring use of the authority.

Specific characteristics of the requirement limit the availability to a sole source. Only this suggested source can furnish the requirements, to the exclusion of other sources, for the following reasons:

☒ Only One Source is Capable.

The Ken Blanchard Companies was the sole source provider for the programs that OIG implemented in November/December 2019. OIG will be proposing an integrated curriculum to build upon the SLII® online and SELF online programs to include, but not limited to, the training listed below for the 2022

conference and customized to the years thereafter (2023-2025). The programs' facilitator and participant materials plus online courses are considered intellectual property of The Ken Blanchard Companies who has exclusive rights to the trademarked and copy-righted materials.

6. A description of efforts made to ensure offers/quotes are solicited from as many potential sources as is practicable, including whether a notice was or will be publicized as required by FAR 5.2 and, if not, which exception under 5.202 applies.

Under this single source determination, there will not be a combined synopsis solicitation, due to the proprietary nature of the training. The sole source justification will be posted as a Notice of Intent to SAM.Gov for 30 days.

7. A determination by the contracting officer that the anticipated cost to the government will be fair and reasonable.

The contracting officer has determined that the anticipated cost is fair and reasonable based on similar training, independent government cost estimate (IGCE) and published price list for similar training materials.

8. Description of Market Research.

While conducting market research it was confirmed that The Ken Blanchard Companies continues to maintain its exclusive rights to the trademarked and copy-righted materials therefore, no other vendor was found to offer the SLII Experience (TM) S1-S4 and D1-D4 leadership development model. Although other companies may offer leadership training it does not offer the same level and or customization of trainings as The Ken Blanchard Companies. Other companies offered these types of trainings in a virtual setting which does not satisfy the needs of this requirement.

9. Any other facts supporting the use of sole source.

The SLII Experience (TM) model, developed by Paul Hersey in the 1960's and SLII Experience (TM), created by Ken Blanchard in the late 1980's, has been used by millions of leaders around the globe. It describes the SLII Model Leadership styles are - Directing, Coaching, Joining and Delegating.

10. A listing of the sources, if any, that expressed written interest in the acquisition.


None.

11. A statement of any actions the agency will take to remove or overcome any future barriers to competition.

The Small Business Administration (SBA) will continue to stay abreast of the training offered from other sources and select those trainings that address the widest range of competencies and align with the Organizations goals and mission.

12. Certification

I certify that the facts and representations under my cognizance, which are included in this justification, and which form a basis for this justification, are complete and accurate.



07/18/2022

Justice Owen
Program Office Official

Date

I certify that this justification is accurate and complete to the best of my knowledge and belief.

Tracie Gutierrez
Contracting Officer
Approval for actions less than \$250,000

Date

13. Approval

I have reviewed this justification and find it to be accurate and complete to the best of my knowledge and belief.

SARA SOEKA Digitally signed by SARA SOEKA
Date: 2022.07.15 14:00:33
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Sara Soeka
Competition Advocate
Approval for actions between \$250,000 and \$15,000,000.00

Date