Request for Proposal

Executive Coaching and Consulting Services

12/19/08

A VASCUPP Member Institution
Issued by
Procurement Services
Charlottesville, Virginia
A. GENERAL INFORMATION

Request for Proposal (RFP) Name: Executive Coaching and Consulting Services

RFP Number: #LP121908

Issue Date: December 19, 2008

Brief Description: Professional executive coaching services to facilitate and deliver, in coordination with the University’s Darden School’s Faculty, individualized coaching for MBA Executives.

Preproposal Questions: Any questions concerning this RFP must be sent to the buyer listed below no later than 3:00 p.m. Monday January 5, 2009 in order to guarantee a timely response prior to the proposal due date.

Proposal Due Date: 3:00 p.m. Friday January 16, 2009. Proposals must be sent to the buyer via email using the contact information in the box below. The University of Virginia (the “University”) reserves the right to reject proposals received after the stated due date and time.

Negotiations: Negotiation Questions, if needed, will be sent to Firms on Tuesday, February 10, 2009.

Expected Award Date: March 16, 2009

Term of Agreement: The term of a resulting Agreement will be for two years, with the ability to renew on the same terms and conditions, for five additional one-year periods if mutually agreeable to the University and the Selected Firm. The Selected Firm and the University will mutually agree at least 180 days prior to each renewal period whether to renew the terms of the Agreement.
This Request for Proposal (RFP) has been posted on Procurement Services web site for your convenience. Addenda and attachments are posted if issued. The RFP can be downloaded at this web site: [http://www.procurement.virginia.edu/main/publicpostings/RFP.html](http://www.procurement.virginia.edu/main/publicpostings/RFP.html). It is the firm’s responsibility to ensure that the latest version of the entire RFP and related links are reviewed prior to submission of a proposal. We encourage you to check the web site frequently for any changes prior to the due date. Call (434) 924-1346 if you have trouble accessing the RFP from the web. For questions about the content of the RFP, contact the buyer listed above. Additional information can be found on Procurement Services web site: [http://www.procurement.virginia.edu/main/](http://www.procurement.virginia.edu/main/)

For ease of reference, each firm or individual receiving this RFP is referred to as a “firm” and the firm or individual selected to provide services for the University is referred to as the “Selected Firm.” This RFP states the instructions for submitting proposals and the procedure and criteria by which a firm may be selected.

B. SCOPE OF SERVICES

The University and its Darden School of Graduate Business (“Darden”) seeks a qualified firm to provide coaching services as part of the established curriculum within the MBA for Executives Program. The 2010 class of 60 students has an average age of 36 years old, with an average 15 years work experience. All have current supervisory, team management and/or budget responsibilities.

Overview

Coaching for the MBAE students is one component of a three-credit Professional Advancement course. The other component of the Professional Advancement course focuses on career advancement, led by staff from Darden's Alumni Career Services and the Career Services Center.

Through their experiences in the Leading Organizations and Management Communications course and in the two prior Leadership Residencies, students' naturally begin to crystallize a leadership or management issue they have in meeting a significant business challenge. The coaching component of the Professional Advancement course begins with helping students’ hone their leadership issue and continues as they work one-on-one with a coach to master that leadership challenge (e.g., building a high performing team, dealing with a difficult employee) in the context of the business objectives (e.g., growing the business or introducing a new accounting system). It is important to note that the focus of the coaching is on leadership skills, not functional content (e.g., how to develop a market or establish a strategy for growth). Because academic credit is involved, the coaching component ends with a graded deliverable (termed a Breakthrough Paper), which documents the student’s progress, learning, and future leadership implications. The coaching component starts during Leadership Residency 2 (March 2009) and concludes at the end of Term 6 (November 2009).
Because there is a career development component of this Professional Advancement course, the nature of the challenges, and thus coaching, are not in the realm of life coaching or career coaching. The coaching is performance-based coaching in the context of the student’s current job challenges.

**Specific Skills Required**

1. Lead Coach or Coaching manager must be a certified coach with significant experience coaching executives with levels of experience similar to or greater than the MBAE students, and significant experience in business; MBA or other advance degree required. The responsibilities of the Lead Coach/Manager are to:
   a. Act as the lead faculty in this segment of the Professional Advancement Course, overseeing the coaching process, its execution and timetable, as well as grading the breakthrough papers and awarding grades in accordance with Darden’s grading policies.
   b. Design a curriculum for the course component, including readings, breakthrough paper guidelines and course evaluation criteria.
   c. Assemble a team of additional performance coaches (6 students per coach means 10 coaches total). These coaches:
      - Must have experience in business and with coaching business executives; certification is highly preferred; familiarity with or certification in assessment instruments such as MBTI (Myers-Briggs Type Indicator), Belbin, Insights, and 360Prospector is preferred.
      - Must represent a variety of functional and industry experience or familiarity roughly matching the class demographics.
   d. Match student and coaches based on students’ leadership issues and coaches experience/background.
   e. Develop an on-boarding process for coaches that familiarizes them with Darden, the MBA for Executives program, the role of the Professional Advancement Course within the MBAE curriculum, and their individual coaches.

2. Lead Coach/Coaching Manager works collaboratively with the Darden Associate Dean, Executive Director and Academic leadership faculty throughout the coaching experience. This includes:
   a. Participate in meetings prior to the start of the coaching component;
   b. Being onsite during Leadership Residency 2 to introduce the coaching component, its requirements and timetable;
   c. Coordinate coaches’ introduction during Term 4 (April 9-11, 2009) with Term 4 faculty leader;
   d. Engage in periodic debriefs during the coaching period with relevant Darden faculty and staff;
   e. Lead a coaching debrief for the students during the end-of-core weekend (October 2-3, 2009);
   f. Participate in a coaching debrief with appropriate Darden faculty and staff once the process has been completed.
3. Specifics of coaching should include:
   a. Coaches must be willing to come to Darden (Charlottesville, VA) for one day to meet their students, informally as a small group for approximately 1.5 hours and individually for approximately .5 hours.
   b. Payment for coaches’ professional consultation with students, and travel to and from Charlottesville, Virginia, will be invoiced to the University’s Procurement Services Department, in its entirety through the Coaching Management Company. Third party billing is not available.

C. BASIS OF SELECTION

Proposals will be evaluated based upon the overall merits/value of the proposal including, but not limited to, price. The University will evaluate proposals, and if a firm is to be selected, select the firm on the basis of:

1. The firm's plan to provide the University with the executive coaching services as described in the Scope of Services section;
2. The firm’s experience in providing executive coaching services similar to those described in this RFP, to include the firm’s references from clients;
3. The firm’s price proposal; and
4. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or the firm’s plan for utilization of SWAM businesses. For more information about SWAM and the University’s SWAM plan, please see the letter at Attachment 1 and refer to the following site: [www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf](http://www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf)

Note 1: A 10% minimum weight will be given to this criterion in evaluating proposals.

Note 2: Any questions related to SWAM business and SWAM subcontracting opportunities can be directed to Bill Cooper, the University’s Director of Supplier Diversity, at (434) 924-7174 or [SWAM@virginia.edu](mailto:SWAM@virginia.edu).

D. CONTENTS OF PROPOSAL

Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content, and should be organized in the order in which the requirements are presented in the RFP. Firms should provide the following information:

1. A brief history of the firm and its experience, qualifications and success in providing the type of services requested.
2. A detailed description and the full specifications of the services proposed. Each firm should indicate in their proposal the firm’s ability to achieve / comply with each specification. In the event that the firm wishes to propose an alternate specification that, in any way, differs from the above specifications, the firm should detail their proposed change(s) and how the proposed change would compare to the listed specification. Proposals should be formatted in such a way to address each of the above specifications in a line-by-line process.
3. The estimated start date of the services from the time of the order (i.e., ten weeks after order).
4. The firm’s proposed price / fee for providing the Services.
5. Provide any additional terms as determined by company managing coaches.
6. At least three references where similar services have been provided. Include the name of the firm / organization, the complete mailing address, and the name of the contact person and their telephone number.
7. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or how the firm intends to utilize SWAM firms in regards to this particular procurement.
8. Provide a list of institutions of higher education with which the firm has signed a term contract.
9. Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of the VASCUPP Members can be found at [http://www.vcu.edu/procurement/coopcon.htm](http://www.vcu.edu/procurement/coopcon.htm)
10. Complete and return the information requested in Attachment 2, Firm Information.
11. Complete and return the information requested in Attachment 3, Prospective Executive Coaching Questionnaire.

**NOTE:** Virginia Freedom of Information Act
Except as provided below, once an award is announced, all proposals submitted in response to this RFP will be open to the inspection of any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by firms as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act; however, the firm must invoke the protections of this section prior to or upon submission of its proposal, and must identify the specific data or other materials to be protected and state the reasons why protection is necessary. Firms may not request that its entire proposal be treated as proprietary information.

**E. TERMS AND CONDITIONS**

This solicitation and any subsequent award is subject to:

- The Selected Firm registering as a vendor with the University of Virginia. [https://www.procurement.virginia.edu/forms/USVendorRegForm.html](https://www.procurement.virginia.edu/forms/USVendorRegForm.html)

**Note:** Unless a firm *expressly and specifically states its exception* to any of the Preferred Provisions in its written proposal, then the proposal from the firm will automatically be deemed to include those Provisions.

F. OTHER INFORMATION

A. Insurance

Listed below is the insurance the Selected Firm must maintain under any Agreement resulting from this RFP. In no event should the Selected Firm construe these minimum required limits to be their limit of liability to the University. The Selected Firm will maintain insurance which meets or exceeds the requirements of the University with insurance companies that hold at least an A- financial rating with A.M. Best Company. No Agreement will be executed by the University until the Selected Firm satisfies the insurance requirements of the University. The Selected Firm may be required to provide the University with a valid Certificate of Insurance before providing any goods or services to the University. The University reserves the right to approve any insurance proposed by the Selected Firm.

Commercial General Liability:
The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of $500,000 per occurrence, to include coverage for the following:

- Premises/Operations
- Products/Completed Operations
- Contractual
- Independent Contractors
- Personal Injury
- Additional Insured

Automobile Insurance:
The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of $500,000 per occurrence with the following coverages for vehicles operated by their employees.

- Any Automobile
- Owned and Non-Owned Automobiles

*Additional Insured:
The University will be named as an Additional Insured, and the proper name is: "The Commonwealth of Virginia, and the Rector and Visitors of the University of Virginia, its officers, employees, and agents."
Greetings:

The quality of service the University of Virginia is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational, health care and research missions. An important part of our procurement program involves our commitment to doing business with small, women-and minority-owned (SWAM) businesses. As one of our most important vendors, we look to you to help us achieve this objective.

We conduct substantial business with small firms. We have been less effective in securing long-term business relationships with minority-and women-owned businesses. We are determined to improve our record.

I seek your assistance in two areas. First, to the extent practical, I ask that you involve small, women-and minority-owned businesses in the delivery of services you provide to UVa. Second, I seek your help in reporting your results through our quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

This effort is important to us. We depend on you in so many ways – this is another way that we can partner with your company to make things better.

Sincerely,

Leonard W. Sandridge
Executive Vice President and Chief Operating Officer

LWS:dr

Madison Hall · Post Office Box 400228 · Charlottesville, Virginia 22904-4228
### Firm Information

<table>
<thead>
<tr>
<th>Full Legal Name</th>
<th>Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company name as it appears with your Federal Taxpayer Number</strong>:</td>
<td></td>
</tr>
<tr>
<td>Telephone Number:</td>
<td>FAX Number:</td>
</tr>
<tr>
<td>Web Address:</td>
<td></td>
</tr>
<tr>
<td>Email Address:</td>
<td></td>
</tr>
<tr>
<td>DUNS Number:</td>
<td></td>
</tr>
</tbody>
</table>

**SWAM Information:**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Is your firm certified with the Commonwealth of Virginia’s Department of Minority Business Enterprises (DMBE):</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minority-Owned Business:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Women-Owned Business:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small-Owned Business:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Is your firm registered as a vendor in the Commonwealth of Virginia’s e-procurement system (eVA)?</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

**Point of Contact for this Proposal:**

Name: 
Address: 
Office No. Mobile No. FAX No. 
Email Address: 

Attachment 3

Prospective Executive Coaching Questionnaire

1. Describe the firm’s core values and operating philosophies. Include any mission or vision statements pertaining to the firm.
2. Provide information regarding how the firm’s core values and business practices, and the services rendered there under, will support the Darden and the MBAE mission and values.
3. Describe the firm’s service area(s) of unique or specialized expertise in the Executive Coaching arena.
4. Describe any tools employed by the firm in the Executive Coaching process and explain the reason for selection and use of each tool.
5. Describe how the firm assists a customer organization’s employee in selecting a coach best suited for his/her needs, and how the firm would match student and coach.
6. Describe how the firm measures the results or return on investment on an individual coaching engagement.
7. Describe the firm’s experience in customizing its coaching methodology for an executive MBA program.
8. Describe briefly the typical background and experience level of the firm’s most senior level executive coaches.
9. Describe briefly the firm’s coaching methodology and standard coaching practices.
10. Describe those areas of the firm’s coaching methodology and/or standard practices that the firm believes to be unique and innovative, and explain why the firm holds this belief.
11. Describe the firm’s process for continuous improvement of the firm’s coaches’ skills and competencies.
12. Provide a closing statement for the firm which summarizes how Darden would benefit from selecting the firm as a Preferred Supplier for Executive Coaching services and which provides a compelling statement regarding why the firm should be selected for Darden’s coaching selection.