COMMONWEALTH OF VIRGINIA

STANDARD CONTRACT

Contract Number: VTS-2781-2025

This contract entered into this 7th day of May 2025 by JAMA Enterprises, Inc DBA Strategic Consulting Partners hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Polytechnic Institute and State University called "Virginia Tech."

WITNESSETH that the Contractor and Virginia Tech, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide Leadership Coaching to Virginia Tech as set forth in the Contract Documents.

PERIOD OF CONTRACT: From May 19, 2025 through May 18, 2026. With options for (4) one-year renewals.

COMPENSATION AND METHOD OF PAYMENT: The Contractor shall be paid by Virginia Tech in accordance with the Contract Documents

CONTRACT DOCUMENTS: The Contract Documents shall consist of this signed contract, Request for Proposal (RFP) number 71412503 dated October 17, 2024, together with Addendum Number 1 To RFP dated November 11, 2024, Addendum Number 2 To RFP dated November 19, 2024, the proposal submitted by the Contractor dated December 16, 2024 and the negotiation summary, all of which Contract Documents are incorporated herein.

ELECTRONIC TRANSACTIONS: If this paragraph is initialed by both parties, to the fullest extent permitted by Code of Virginia, Title 59.1, Chapter 42.1, the parties do hereby expressly authorize and consent to the use of electronic signatures as an additional method of signing and/or initialing this contract and agree electronic signatures (for example, the delivery of a PDF copy of the signature of either party via facsimile or electronic mail or signing electronically by utilizing an electronic signature service) are the same as manual executed handwritten signatures for the purposes of validity, enforceability and admissibility.

DS MG / DS JS
(Initials)

In WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

Contractor By: DocuSigned by: Monica Gould 5F12261822F84D8... (Signature) Monica Gould President Name and Title	Virginia Tech By: DocuSigned by: John Spence 05597CC6EBEB425... John Spence Associate Director of Procurement for Goods and Services

Request for Proposal 71412503

For

Leadership Coaching

October 17, 2024

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

RFP # 71412503, Leadership Coaching

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until November 18, 2024 at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Angela Caldwell, Phone: (540) 231-1269 e-mail: acaldwell@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by 2:00 PM on November 4, 2024. Inquiries must be submitted to the procurement officer identified in this solicitation.

VIRTUAL PRE-PROPOSAL CONFERENCE: A pre-proposal conference will be held on October 29, 2024 at 1:00 PM. See RFP Section IX, Pre-proposal Conference for additional information.

PROPOSAL SUBMISSION:

Please note, proposal submission procedures have changed effective March 2023.

Proposals may NOT be hand delivered to the Procurement Office.

Proposals should be submitted electronically through Virginia Tech's procurement portal. This portal allows you access to view business opportunities and submit bids and proposals to Virginia Tech digitally and securely.

Proposals must be submitted electronically at:
https://bids.sciquest.com/apps/Router/PublicEvent?CustomerOrg=VATech

Vendors will need to register through this procurement portal, hosted by Jaggaer. **It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions**. Registration is easy and free. If you have any challenges with the registration process, please contact Jaggaer Support at 1-800-233-1121 or procurement@vt.edu.

Click on the opportunity and log in to your vendor account to begin preparing your submission. Upon completion, you will receive a submission receipt email confirmation. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 50MB in order to be received by the University.

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

AUTHORIZED SIGNATURE: ______________________________ Date: ___________________________

[INCLUDE THIS PAGE]

I. PURPOSE:

This Request for Proposal (RFP) seeks to solicit proposals to establish a contract through competitive negotiations by Virginia Polytechnic Institute and State University (Virginia Tech), an agency of the Commonwealth of Virginia.

Virginia Tech is seeking proposals from leadership coaching vendors with proven experience working directly with higher education institutions. The selected vendor(s) will play a crucial role in providing comprehensive coaching services aimed at enhancing leadership capabilities across the university. These services will be designed to support and strengthen leaders at all levels of our organization, from emerging leaders to senior executives. By fostering personal and professional growth, the coaching program will contribute to the ongoing development of our leadership culture and ensure that Virginia Tech continues to thrive in a rapidly changing academic environment.

II. SMALL, WOMAN-OWNED AND MINORITY (SWAM) BUSINESS PARTICIPATION:

The mission of the Virginia Tech supplier opportunity program is to foster inclusion in the university supply chain and accelerate economic growth in our local communities through the engagement and empowerment of high quality and cost competitive small, minority-owned, women-owned, and local suppliers. Virginia Tech encourages prime suppliers, contractors, and service providers to facilitate the participation of small businesses, and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other inclusive and innovative relationships.

For more information, please visit: https://www.sbsd.virginia.gov/

III. CONTRACT PERIOD:

The term of this contract is for one (1) year(s), or as negotiated. There will be an option for four (4) one-year renewals, or as negotiated.

IV. EVA BUSINESS-TO-GOVERNMENT ELECTRONIC PROCUREMENT SYSTEM:

The eVA Internet electronic procurement solution streamlines and automates government purchasing activities within the Commonwealth of Virginia. Virginia Tech, and other state agencies and institutions, have been directed by the Governor to maximize the use of this system in the procurement of goods and services. *We are, therefore, requesting that your firm register as a vendor within the eVA system.*

There are transaction fees involved with the use of eVA. These fees must be considered in the provision of quotes, bids and price proposals offered to Virginia Tech. Failure to register within the eVA system may result in the quote, bid or proposal from your firm being rejected and the award made to another vendor who is registered in the eVA system.

Registration in the eVA system is accomplished on-line. Your firm must provide the necessary information. Please visit the eVA website portal at http://www.eva.virginia.gov/pages/eva-registration-buyer-vendor.htm and **register both with eVA and Ariba**. *This process needs to be completed before Virginia Tech can issue your firm a Purchase Order or contract.* If your firm conducts business from multiple geographic locations, please register these locations in your initial registration.

For registration and technical assistance, reference the eVA website at: https://eva.virginia.gov/, or call 866-289-7367 or 804-371-2525.

V. CONTRACT PARTICIPATION:

It is the intent of this solicitation and resulting contract to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or Virginia Tech's affiliated corporations and/or partnerships may access any resulting contract if authorized by the contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor, the resultant contract may be extended to the entities indicated above to purchase at contract prices in accordance with contract terms. The Contractor shall notify Virginia Tech in writing of any such entities accessing the contract, if requested. No modification of this contract or execution of a separate contract is required to participate. The Contractor will provide semi-annual usage reports for all entities accessing the Contract, as requested. Participating entities shall place their own orders directly with the Contractor and shall fully and independently administer their use of the contract to include contractual disputes, invoicing and payments without direct administration from Virginia Tech. Virginia Tech shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that Virginia Tech is not responsible for the acts or omissions of any entity, and will not be considered in default of the contract no matter the circumstances.

Use of this contract does not preclude any participating entity from using other contracts or competitive processes as the need may be.

VI. STATEMENT OF NEEDS:

1. Individual Leadership Coaching:

   a. Provide one-on-one coaching sessions to leaders within the organization on an as needed basis.

   b. Develop personalized coaching plans that align with the individual's strengths, development areas and career objectives.

   c. Support in addressing specific leadership challenges and building competencies such as emotional intelligence, strategic thinking, team management, communications and decision making.

2. Group Coaching:

   a. Provide group coaching sessions for leadership teams or groups of emerging leaders on an as-needed basis.

   b. Emphasize collaborative leadership, team dynamics, and organizational performance improvement as needed.

3. Workshop & Development Programs:

    a. Offer workshops, seminars or leadership development programs as part of a comprehensive coaching strategy.

    b. Topics may include, but are not limited to: executive presence, conflict resolutions, change management

4. Assessments:

    a. Utilize leadership assessments to evaluate current leadership strengths and areas for improvement.

    b. Provide feedback and recommendations based on assessment results.

5. Ongoing Support & Accountability:

    a. Offer continuous support to participants throughout the coaching engagement to ensure progress toward established goals.

    b. Create actionable development plans and track measurable outcomes.

VII. PROPOSAL PREPARATION AND SUBMISSION:

A. Specific Requirements

Proposals should be as thorough and detailed as possible so that Virginia Tech may properly evaluate your capabilities to provide the required goods or services. Offerors are required to submit the following information/items as a complete proposal:

1. Provide a brief description of your organization including experience in leadership coaching with other higher educational institutions. Describe coaching methodologies and approaches.

2. Provide overview of the coaches' qualifications, certificates and expertise in leadership coaching. Providing examples of previous coaching engagements, particularly with organizations of similar size and scope, is strongly encouraged.

3. Provide a detailed description of the approach to be taken for individual and group coaching. At a minimum, this description should include a list of tools, techniques and assessment methods. Include the plan for measuring the effectiveness and success of the coaching programs

4. Clearly break down pricing for individual coaching, group coaching, workshops, assessments and any other relevant services.

5. Provide at least three references from previous clients who have engaged in similar leadership coaching services.

6. Participation of Small, Women-owned and Minority-owned Business (SWAM) Business:

    If your business cannot be classified as SWaM, describe your plan for utilizing SWaM subcontractors if awarded a contract. Describe your ability to provide reporting on SWaM subcontracting spend when requested. If your firm or any business that you plan to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award. If your firm is currently certified, you agree to maintain your certification for the life of the contract. For assistance with SWaM certification, visit the SBSD website at http://www.sbsd.virginia.gov/

7. The return of the Submission Instruction page and addenda, if any, signed and filled out as required.

B. General Requirements

1. RFP Response: In order to be considered for selection, Offerors shall submit a complete response to this RFP to include;

   a. **One (1) electronic document** in WORD format or searchable PDF of the entire proposal as one document, INCLUDING ALL ATTACHMENTS must be uploaded through the Virginia Tech online submission portal. Refer to page 2 for instructions.

      Any proprietary information should be clearly marked in accordance with 2.d. below.

   b. Should the proposal contain **proprietary information**, provide **one (1) redacted electronic copy** of the proposal and attachments **with proprietary portions removed or blacked out**. This redacted copy should follow the same upload procedures as described on Page 1 of this RFP. This redacted copy should be clearly marked *"Redacted Copy"* within the name of the document. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable. Virginia Tech shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

      No other distribution of the proposals shall be made by the Offeror.

2. Proposal Preparation:

   a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in Virginia Tech requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by Virginia Tech at its discretion. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

   b. 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.

   c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, subletter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and subletter should be repeated at the top of the next page.

The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

d. Ownership of all data, material and documentation originated and prepared for Virginia Tech pursuant to the RFP shall belong exclusively to Virginia Tech and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act. However, to prevent disclosure the Offeror must invoke the protections of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other materials is submitted. The written request must specifically identify the data or other materials to be protected and state the reasons why protection is necessary. -The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and may result in rejection of the proposal.

3. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to Virginia Tech.—This will provide an opportunity for the Offeror to clarify or elaborate on the proposal but will in no way change the original proposal. Virginia Tech will schedule the time and location of these presentations. Oral presentations are an option of Virginia Tech and may not be conducted. Therefore, proposals should be complete.

VIII. SELECTION CRITERIA AND AWARD:

A. Selection Criteria

Proposals will be evaluated by Virginia Tech using the following:

Criteria	Maximum Point Value
1. Quality of products/services offered and suitability for the intended purposes	20
2. Qualifications and experiences of Offeror in providing the goods/services	30
3. Specific plans or methodology to be used to provide the Services	20
4. Cost (or Price)	20
5. Participation of Small, Women-Owned and Minority (SWAM) Business	10
Total	100

B. Award

Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for Proposal. Negotiations shall then be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Virginia Tech shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. Virginia Tech may cancel this Request for Proposal or reject proposals at any time prior to an award. Should Virginia Tech determine in writing and in its sole discretion that only one offeror has made the best proposal, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of this solicitation and the Contractor's proposal as negotiated.

Virginia Tech reserves the right to award multiple contracts as a result of this solicitation.

IX. OPTIONAL VIRTUAL PRE-PROPOSAL CONFERENCE:

An optional pre-proposal conference will be held on October 29, 2024 at 1:00 PM. The purpose of this conference is to allow potential Offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation. If you are interested in attending the meeting, please use the following Zoom Meeting link.

https://virginiatech.zoom.us/j/89366499898

While attendance at this conference will not be a prerequisite to submitting a proposal, offerors who intend to submit a proposal are encouraged to attend.

Bring a copy of this solicitation with you. Any changes resulting from this conference will be issued in a written addendum to this solicitation.

X. INVOICES:

Invoices for goods or services provided under any contract resulting from this solicitation shall be submitted by email to vtinvoices@vt.edu or by mail to:

Virginia Polytechnic Institute and State University (Virginia Tech)
Accounts Payable
North End Center, Suite 3300
300 Turner Street NW
Blacksburg, Virginia 24061

XI. METHOD OF PAYMENT:

Virginia Tech will authorize payment to the contractor as negotiated in any resulting contract from the aforementioned Request for Proposal.

Payment can be expedited through the use of the Wells One AP Control Payment System. Virginia Tech strongly encourages participation in this program. For more information on this program please refer to Virginia Tech's Procurement website: http://www.procurement.vt.edu/vendor/wellsone.html or contact the procurement officer identified in the RFP.

XII. ADDENDUM:

Any **ADDENDUM** issued for this solicitation may be accessed at https://bids.sciquest.com/apps/Router/PublicEvent?CustomerOrg=VATech. Since a paper copy of the addendum will not be mailed to you, we encourage you to check the web site regularly.

XIII. COMMUNICATIONS:

Communications regarding this solicitation shall be formal from the date of issue, until either a Contractor has been selected or the Procurement Department rejects all proposals. Formal communications will be directed to the procurement officer listed on this solicitation. Informal communications, including but not limited to request for information, comments or speculations regarding this solicitation to any University employee other than a Procurement Department representative may result in the offending Offeror's proposal being rejected.

XIV. CONTROLLING VERSION OF SOLICITATION:

The posted version of the solicitation and any addenda issued by Virginia Tech Procurement Services is the mandatory controlling version of the document. Any modification of/or additions to the solicitation by the Offeror shall not modify the official version of the solicitation issued by Virginia Tech Procurement Services. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, Virginia Tech reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.

XV. TERMS AND CONDITIONS:

This solicitation and any resulting contract/purchase order shall be governed by the attached terms and conditions, see Attachment A.

XVI. CONTRACT ADMINISTRATION:

A. Greg Beecher, Director of Talent Development, VP- Human Resources, at Virginia Tech or their designee, shall be identified as the Contract Administrator and shall use all powers under the contract to enforce its faithful performance.

B. The Contract Administrator, or their designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or their designee, shall not have authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Virginia Tech Procurement Department through a written amendment to the contract.

XVII. ATTACHMENTS:

Attachment A - Terms and Conditions

ATTACHMENT A

TERMS AND CONDITIONS

RFP GENERAL TERMS AND CONDITIONS

See:
https://www.procurement.vt.edu/content/dam/procurement_vt_edu/docs/terms/GTC_RFP_02182022.pdf

ADDITIONAL TERMS AND CONDITIONS

1. **ADDITIONAL GOODS AND SERVICES**: The University may acquire other goods or services that the supplier provides other than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services newly introduced during the term of the Agreement.

2. **AUDIT**: The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Virginia Tech, its authorized agents, and/or the State auditors shall have full access and the right to examine any of said materials during said period.

3. **AVAILABILITY OF FUNDS**: It is understood and agreed between the parties herein that Virginia Tech shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

4. **CANCELLATION OF CONTRACT**: Virginia Tech reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

5. **CONTRACT DOCUMENTS**: The contract entered into by the parties shall consist of the Request for Proposal including all modifications thereof, the proposal submitted by the Contractor, the written results of negotiations, the Commonwealth Standard Contract Form, all of which shall be referred to collectively as the Contract Documents.

6. **IDENTIFICATION OF PROPOSAL**: Virginia Tech will only be accepting electronic submission of proposals. All submissions must be submitted to the Virginia Tech online submission portal. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time. **Attachments must be smaller than 50MB in order to be received by the University.** Proposals may **NOT** be hand delivered to the Procurement Office.

7. **NOTICES**: Any notices to be given by either party to the other pursuant to any contract resulting from this solicitation shall be in writing via email.

8. **SEVERAL LIABILITY:** Virginia Tech will be severally liable to the extent of its purchases made against any contract resulting from this solicitation. Applicable entities described herein will be severally liable to the extent of their purchases made against any contract resulting from this solicitation.

9. **CLOUD OR WEB HOSTED SOFTWARE SOLUTIONS**: For agreements involving Cloud-based Web-hosted software/applications refer to link for additional terms and conditions: http://www.ita.vt.edu/purchasing/VT_Cloud_Data_Protection_Addendum_final03102017.pdf

10. **ADVERTISING:** In the event a contract is awarded for supplies, equipment, or services resulting from this solicitation, no indication of such sales or services to Virginia Tech will be used in product literature or advertising. The contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.

11. **CRIMINAL CONVICTION CHECKS:** All criminal conviction checks must be concluded before the Contractor's employees gaining access to the Virginia Tech Campus. Employees who have separated employment from Contractor shall undergo another background check before re-gaining access to the Virginia Tech campus. Contractor shall ensure subcontractors conduct similar background checks. All criminal conviction checks will normally include a review of the individual's records to include Social Security Number Search, Credit Report (if related to potential job duties), Criminal Records Search (any misdemeanor convictions and/or felony convictions are reported) in all states in which the employee has lived or worked over the past seven years, and the National Sex Offender Registry. In addition, the Global Watch list (maintained by the Office of Foreign Assets Control of The US Department of Treasury) should be reviewed. Virginia Tech reserves the right to audit a contractor's background check process at any time. All employees must self-disclose any criminal conviction(s) occurring while assigned to the Virginia Tech campus. Such disclosure shall be made to Contractor, which in turn shall notify the designated Virginia Tech contract administrator within 5 days. If, any time during the term of the contract, Virginia Tech discovers an employee has a conviction which raises concerns about university buildings, property, systems, or security, the contractor shall remove that employee's access to the Virginia Tech campus, unless Virginia Tech consents to such access in writing. Failure to comply with the terms of this provision may result in the termination of the contract.

    a. The University has an awarded contract with a service provider for criminal conviction screening and background checks. The University prefers this vendor be utilized by the Contractor to comply with the contractual obligations and University Policy 4060.

    b. If Contractor chooses to utilize a different firm than the university's preferred provider, the Contractor's selected service provider shall be pre-approved by the Virginia Tech Police department as an acceptable service provider for criminal conviction and background checks to ensure that firm's service levels meet the requirements of University Policy 4060.

    c. If a Contractor chooses to utilize a different firm than the university's preferred provider, a five-day hold will be required before placement of employees deemed by the Contractor to meet all of the requirements of the University including a clean background check. Contractor shall provide the University with the name, date of birth and the last four digits of the social security number of all individual(s) to be placed in a temporary position under this contract. The University reserves the right to conduct its own background check process during this hold period.

12. **INSURANCE**:

    By signing and submitting a Proposal/Bid under this solicitation, the offeror/bidder certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

    During the period of the contract, Virginia Tech reserves the right to require the contractor to furnish certificates of insurance for the coverage required.

    INSURANCE COVERAGES AND LIMITS REQUIRED:

    A. Worker's Compensation - Statutory requirements and benefits.

B. Employers Liability - $100,000.00
C. General Liability - $2,000,000.00 combined single limit. Virginia Tech and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
D. Automobile Liability - $500,000.00
E. Builders Risk – For all renovation and new construction projects under $100,000 Virginia Tech will provide All Risk – Builders Risk Insurance. For all renovation contracts, and new construction from $100,000 up to $500,000 the contractor will be required to provide All Risk – Builders Risk Insurance in the amount of the contract and name Virginia Tech as additional insured. All insurance verifications of insurance will be through a valid insurance certificate.
F. The contractor agrees to be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, <u>including but not limited to claims under the Worker's Compensation Act</u>. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.

13. **PRICE ESCALATION/DEESCALATION**: Price adjustments for changes in the contractor's price of materials, labor and transportation may be permitted. Request for price adjustments for any other reasons will not be granted. No price increases will be authorized for 365 calendar days after the effective date of the contract. Contractor shall give not less than 30 days advance notice prior to the annual renewal of the contract of any desired price increase.

The Contractor shall document the amount and proposed effective date of any general change in the price of materials, labor and transportation. Documentation shall be supplied with the contractor's request for increase which will (1) verify that the requested price increase is general in scope and not applicable just to Virginia Tech, and (2) verify the amount or percentage of increase which is being passed on to the contractor by the contractor's suppliers. Failure by the contractor to supply the aforementioned verification with the request for price increase will result in a delay of the effective date of such increase. The Virginia Tech Procurement Department may verify such change in price independently. The Virginia Tech Procurement Department may make such verification as it deems adequate. However, any increase which the Virginia Tech Procurement Department determines is excessive, regardless of any documentation supplied by the contractor, may be cause for cancellation of the contract by the Virginia Tech Procurement Department. The Virginia Tech Procurement Department will notify the contractor in writing of the effective date of any increase which is approved. However, the contractor shall fill all purchase orders received prior to the effective date of the price adjustments of the old contract prices.

"Across the Board" price decreases are subject to implementation at any time and shall be immediately conveyed to Virginia Tech. The contractor is further advised that price decreases which affect the price of materials, labor, and transportation are required to be passed on to Virginia Tech immediately. Failure to do so will result in action to recoup such amounts.

14. **RENEWAL OF CONTRACT**: This contract may be renewed by Virginia Tech upon written agreement of both parties for four (4) one-year renewals under the terms of the current contract, and at a reasonable time (approximately 90 days) prior to the expiration.

15. SAFETY: The contractor bears sole responsibility for the safety of its employees. The contractor shall take all steps necessary to establish, administer, and enforce safety rules that meet the regulatory requirements of the Virginia Department of Labor and Industry (VDLI) and the Occupational Safety and Health Administration (OSHA). The contractor shall take steps as necessary to protect the safety and health of university employees, students, and visitors during the performance of their work. In addition, the contractor must also provide the university with a written safety program that it intends to follow in pursuing work under this contract. By entering into a contract with Virginia Tech, the contractor and its subcontractors agree to abide by the requirements described in Safety Requirements for Contractors and Subcontractors located on Virginia Tech's Environmental, Health and Safety Services (EHSS) web site at this URL https://ehs.vt.edu/programs/occupational-safety/contractor-safety.html. A copy of the publication may also be obtained by contacting EHS at 540/231- 5985. No work under this contract will be permitted until the university is assured that the contractor has an adequate safety program in effect.

16. **SIDEWALK POLICY:** Driving on sidewalks is allowed when there is no other way to get a needed vehicle to a designated place or building on campus. The vehicle operator shall be made aware that extreme caution shall be used to operate the vehicle in a way that will not be a hazard or hindrance to pedestrians using the walk. The contractor shall be responsible for any damage to turf and anything that is located adjacent to the walk. Parking an unattended vehicle on a sidewalk is strictly prohibited by State Law. The contractor is allowed to park a vehicle on a sidewalk if there is no other way to perform necessary work. The procedure to obtain a permit to operate a vehicle on sidewalks is the same as for the turf as outlined in Turf Policy. Any vehicle parked illegally on sidewalks shall be subject to ticketing, fines and towing if necessary.

17. **WORK SITE DAMAGES**: Any damage to existing utilities, equipment or finished surfaces resulting from the performance of this contract shall be repaired to the Owner's satisfaction at the contractor's expense.

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
PROCUREMENT DEPARTMENT

ADDENDUM NO. 1

DATE:	November 11, 2024
TO:	All Offerors
FROM:	Angela Caldwell, Contracting Officer
TOTAL PAGE(S):	9 pages (not including attachments)
SOLICITATION TITLE:	Leadership Coaching
SOLICITATION NUMBER:	71412503

I. CLARIFICATIONS AND ADDITIONAL INFORMATION

The due date has been revised to **November 22, 2024.**

Please reference the Hokie Dozen here.

Please reference the Leadership Excellence here.

Exhibit A - Criminal Conviction Checks Contractor Checklist

Exhibit B – Attendance Roster

Proposers are advised that this RFP seeks to make Leadership Coaching/Training options available to the University. These services will be utilized on an As-Needed basis and no minimum amount of business is guaranteed. Because of this, it is not possible to project specifics about the number of sessions or the specific requirements/scheduling of those sessions.

II. REQUESTS FOR INFORMATION

1. Can the coaching services such as coaching sessions (individual or group) and leadership workshops be provided in person as well as virtually?

   Virginia Tech Response: Yes, we would prefer both options to be available.

2. Is there specific assessment tools Virginia Tech is interested in?

   Virginia Tech Response: We currently have MBTI, TKI, FIRO-B, EQi360, CliftonStrengths, and KAI assessments that we use. We are not opposed to these being used in the Leadership Coaching, but are open to others that coaches may want to use.

3. Is there an incumbent providing these services?

   Virginia Tech Response: There are no incumbents for this service.

4. Do you anticipate selecting multiple qualified vendors through this procurement process? If so, would Va Tech faculty, staff, and administrators then be able to choose from the approved vendors?

   Virginia Tech Response: Please refer to Section VIII.B. Also, each awarded vendor will be available for use by campus.

5. Is there an estimate of the number of leaders who may need individual coaching and/or group coaching, and how they will be referred to services?

   Virginia Tech Response: At this time, we do not have an estimated number of individuals listed for this service. This agreement will be available for use by campus on as As-Needed basis.

6. Would we have an opportunity to assist with sharing about our services to leaders or individual departments within Virginia Tech?

   Virginia Tech Response: Yes, this would need to be coordinated with the departments after award is made.

7. Is there a timeline for Workshops to be offered? For example, is there a target for the number of sessions to be offered and how often these sessions will be offered? Will it be for a cohort of leaders who attend sessions together, or can participants take individual sessions?

   Virginia Tech Response: There is not a timeline for this. It will be based more on requests/demands by leaders/departments.

8. Are the coaching or workshops mandated by performance requirements or will participants opt in as needed?

   Virginia Tech Response: This would be an opt in function and not mandatory.

9. Are you seeking x-number of hours per week, monthly, or quarterly per sessions as-needed throughout the year?

   Virginia Tech Response: There is not currently a minimum or a maximum number of hours we are seeking.

10. Group Coaching: How many leaders are you requesting to be included in group coaching? This is important as effective group teaching of groups between 12 - 17 individuals are ideal for leadership.

    Virginia Tech Response: Maximum number of individuals for a group coaching should be identified by the provider.

11. Group Coaching: How many sessions collectively are you wanting the groups to meet (monthly, quarterly, semi-annually)?

Virginia Tech Response: There is not a set parameter we are seeking on the frequency or number of sessions.

12. Workshop & Development Programs: Are you requiring printed material such as handouts, printed exercises, or workbook activities?

    Virginia Tech Response: We are not requiring printed materials, but digital versions are helpful. However, what is needed, should be determined by the provider.

13. Workshop & Development Programs: How long are you seeking the workshop sessions (e.g., weekly, monthly, quarterly?)

    Virginia Tech Response: There is not a set amount of time or number of sessions.

14. Ongoing Support: Are you referring to indefinite support in between sessions? Evening? Weekends?

    Virginia Tech Response: No, this is not an indefinite level of support. The provider should determine when they are/are not available (including evenings & weekends) and what time zone as this would be important to know for employees seeking services.

15. Who is the contractor vendor that supports the University's criminal background check?

    Virginia Tech Response: Virginia Tech utilizes Truescreen, Inc. However, there will be requirements in order to use Truescreen. If the requirements are not met, you may submit a **Criminal Conviction Checks Contractor Checklist** provided below to the buyer. Once completed, the form will undergo review and approval by the Virginia Tech Police Department.

16. Section IV. 4.a: Is there a particular Assessment favored by VT or can options be proposed?

    Virginia Tech Response: We are a Strengths campus, but other than that, there is no preferred assessment.

17. Section VII. A. 4: Is The Pricing Breakdown for the Base Year only, or should anticipated Option Years Pricing be included?

    Virginia Tech Response: Please provide your breakdown of pricing for all services you are proposing to offer. Pricing shall remain the same for the initial term. At the time of renewal, offerors are able to propose a price adjustment but supporting documentation will be required. This will be further addressed during negotiations.

18. What is the anticipated time for delivery - how long are you thinking coaching will be offered?

Virginia Tech Response: Timeframe options should be determined by the coach, but adjustable based on client needs and available resources (e.g., amount of time and costs).

19. Are you open to vendors not from Durham, Richmond, Charlottesville, Raleigh, Washington?

    Virginia Tech Response: Yes.

20. Do you recognize small and minority business certifications outside from states outside of Virginia - Our firm is in Florida? (Reciprocity) - Do you recognize federal 8(a) as part of SWAM.

    Virginia Tech Response: Eligibility criteria for SWaM Certification is managed by the Virginia Department of Small Business and Supplier Diversity (SBSD). Please visit their website at https://sbsd.virginia.gov for more information about whether your company qualifies for certification.

21. Can you provide more detail on how Virginia Tech evaluates SWAM participation? What level of involvement or contribution from SWAM vendors is expected?

    Virginia Tech Response: Virginia Tech does not have a stated goal but we encourage the majority of firms to utilize SWaM to the greatest extent possible. Please reference Section II of the RFP.

22. Is there a preferred format or structure for the proposals, beyond what is outlined in the RFP?

    Virginia Tech Response: There is no preferred structure/format beyond what is outlined in the RFP document. Please submit in the format you believe best communicates the services you are offering.

23. What is the level of leader that will be eligible to receive these services?

    Virginia Tech Response: All levels of the organization from senior leader to front line manager.

24. How many hours will be included in each individual coaching session and should there be provision for preparation hours?

    Virginia Tech Response: No set parameters on the number of hours for coaching, but prep time should be set into the structure/pricing offered by provider.

25. What is the estimated number of executive coaching sessions, leadership development workshops, and assessments that will be ordered?

    Virginia Tech Response: Virgnia Tech cannot guarantee any amount of business.

26. Will participation in developmental activities be voluntary?

    Virginia Tech Response: Yes

27. How many leaders will participate in this engagement? Would all participating leaders receive *all* provided services (one-on-one coaching, group coaching, workshops, etc.)?

    Virginia Tech Response: This is subject to request/need and is not currently known how many will participate.

28. How many group coaching sessions are envisioned in the scope of this effort?

    Virginia Tech Response: There is not an estimate on how many group sessions may be requested.

29. Would there be any connection between the one-on-one coaching and the group coaching? Would the one-on-one coaching be used to supplement the material for group coaching sessions, or would these two offerings be completely separate?

    Virginia Tech Response: It's expected that most of this would be separate, but an option for a coach to recommend a group session w/ certain individuals may be of value.

30. Will Va Tech provide the audio/visual equipment, meeting space (flip charts, markers, etc?)

    Virginia Tech Response: The awarded vendor(s) will be provided with access to a designated meeting space. Should system integration be required, the vendor(s) must undergo a security database process, which will subsequently need approval from our IT department.

31. Does the Economically Disadvantaged Women Owned Small Business (EDWOSB) Certification Awarded by the U.S. Small Business Administration satisfy your SWAM requirement?

    Virginia Tech Response: No, in order to receive all 10 points, you must be Virginia Certified SWaM. Please reference Section II of the RFP for more information.

32. Given potential challenges with scheduling, what is the expectation in terms of number of group coaching sessions and workshops?

    Virginia Tech Response: This would primarily be determined between the coach and the employee.

33. What is the vision for the work to be continued within the yearly renewals? We understand they are optional, however any ideas would help inform the approach for the first year (even as a discrete offering).

Virginia Tech Response: Virginia Tech may consider a variety of criteria in determining interest in optional renewals including, but not limited to, satisfaction with services provided.

34. Have any of these individuals received coaching in the past? If yes, can you provide details?

    Virginia Tech Response: Coaching has not been a centralized resource available in the past, so it is unknown what coaching individuals have received.

35. What metrics did you use to measure success? Have you defined metrics for how you will evaluate the success of the coaching engagements? If yes, what are they?

    Virginia Tech Response: Positive evaluations and repeated use of coaches would be metrics used to evaluate the success.

36. Have you determined how many sessions and length of sessions you want to take place over the anticipated period?

    Virginia Tech Response: No determined number of sessions or length.

37. Do you have a process for matching coaches with leaders? If yes, what is it?

    Virginia Tech Response: Individuals who are looking for a coach will be provided information about available coaching companies via a VT website. Instructions and what is important to be known for scheduling a coach will be included on the website (e.g., how to pay for services, discussing number of sessions, etc.).

38. What technology do you use for online meetings (zoom, google meets, teams, etc.)? Do you have a preference of what is used for any remote sessions?

    Virginia Tech Response: No preference, currently the University uses both Zoom and MS Teams.

39. The RFP states the coaching should be focused on areas of leadership including emotional intelligence, strategic thinking, team management, communications and decision making. What percent of the coaching plan should focus on these specific areas versus other personal needs and opportunities that result from an assessment or personal area of interest?

    Virginia Tech Response: As this is the first time providing this service, we do not have percentages available on these various topics.

40. How, if at all, do you see the individual manager being involved in the coaching process (e.g., meet with client and coaches to discuss priorities, review 360 participant names if using 360, meet at the end of coaching to discuss progress)?

Virginia Tech Response: If the employee chooses to include the manager, that would be fine. Otherwise, we do not expect them to be involved in the process other than if a 360 assessment tool is used.

41. What if any drivers are there for this request (e.g. received a grant, growing a high potential leader, addressing performance issues, wanting to take performance / DEI to the next level)?

    Virginia Tech Response: The driver for this request is based on the request for these types of services, observing the growing need for leadership coaching, and to help improve overall performance.

42. Can we bid on specific parts of the proposal? (i.e. 1:1 coaching and group coaching only?)

    Virginia Tech Response: Yes.

43. Do you differentiate training by level? Front line, management, top executives

    Virginia Tech Response: We don't necessarily differentiate by level, but based on competency need. It is important to remember the target audience and their skill set.

44. Do you have leadership competencies defined? Is your leadership training delivered based on those competencies?

    Virginia Tech Response: Please reference the leadership competencies here. The competencies, what we call the Hokie Dozen, are integrated into the topics of discussion for our cohort based leadership program and beyond.

45. Do you currently utilize an employee opinion survey? If yes, how often does it run and what areas does it focus on?

    Virginia Tech Response: We use a learners survey for post training, a LMS customer survey, and a Climate Survey with employees.

46. Will VT pay travel costs? If so, should we include forecasted travel costs in our estimate? Will contractors in the immediate Blacksburg, VA, area be considered preferred vendors due to their proximity to the University?

    Virginia Tech Response: In the event that travel is required, travel shall be reimbursed by the GSA per diem rates. Travel documentation must be provided. Geographic location is not a factor that is used to score proposals, however overall cost will be taken into consideration.

47. In addition to the requirements noted on pages 5 and 6 of the RFP, is Virginia Tech amenable to a needs analysis and the costs associated with this analysis to pinpoint the specific leadership issues being addressed, identify desired changes in the current culture, and address any underlying causes of leadership issues?

Virginia Tech Response: There is not capacity to do a needs analysis across the university at this time. It is something that we will likely conduct ourselves as we integrate leadership coaching into our culture and complete current leadership training through our second cohort of our Leadership Excellence program.

48. Will this work only occur at the Blacksburg Campus, or do you anticipate some coaching at satellite campuses such as Roanoke and the Washington, DC, area?

    Virginia Tech Response: Virginia Tech is interested in establishing services for all locations. If there are limitations on where your services can be provided, please provide that detail in your proposal.

49. Under "Ongoing Support and Accountability," the RFP mentions, "Offer continuous support to participants throughout the coaching engagement to ensure progress toward established goals." Do you envision the coaching centering around development goals for each individual and/or performance goals that support the University's strategy and mission and the unit-level plans that are available online?

    Virginia Tech Response: Goals should be a concise part of the coaching plan with employees.

50. Do you have a budget or not-to-exceed amount for this work?

    Virginia Tech Response: No amount of business is guaranteed to any vendor that is awarded a contract. This will be as needed contract.

51. Are there specific competencies / skills that are expected to be a part of the coaching program?

    Virginia Tech Response: The Hokie Dozen should be the competencies that are focused on in the coaching program.

52. Do you have an expected frequency for the trainings? Is there an approximate number of sessions you would like the consultant to conduct? Would you be able to provide a breakdown in the frequency and number of sessions by service?

    Virginia Tech Response: There is not a minimum/maximum number of sessions that we are requiring, but it may be limited by the employee in regard to their availability and resources.

53. Insurance Coverage: Can you please explain if all of these listed are required for this RFP?

    Virginia Tech Response: This language is used for all Virginia Tech public solicitations and may not be applicable for all situations. This can be discussed during negotiations if revisions need to be made.

54. Does Virginia Tech participate in Cooperative Procurement Agreements for similar services within the state of Virginia?

    Virginia Tech Response: Virginia Tech has the option to utilize cooperative contracts, if you have a cooperative contract you believe may be of interest to the University you may include reference to it in your proposal.

55. Are there any preferred or required credentials for coaches or facilitators?

    Virginia Tech Response: Please list your certifications, education, training etc. that has prepared you to do leadership coaching.

56. We believe we will need to include the cost for background checks. If yes, how much does it cost per person if we were to use your VA Tech partner?

    Virginia Tech Response: Virginia Tech's designated partner for this service is Truescreen, Inc. If you intend to engage an alternate vendor, you are required to complete the **Criminal Conviction Checks Contractor Checklist** provided below. Once completed, please submit the form to the buyer. Following submission, the form will undergo review and approval by the Virginia Tech Police Department.

57. Would you consider a pricing structure with multiple tiers for our coaches and facilitators?

    Virginia Tech Response: Tiered pricing is acceptable.

58. I am part of the VA state business registry. Is this acceptable or do you need additional certifications.

    Virginia Tech Response: Please provide documentation of any certifications or credentials you have obtained to qualify as a leadership coach. Additionally, if you are a Virginia certified small business vendor, kindly include a copy of your certification with your proposal. If you are currently in the process of applying for the SWaM (Small, Women-owned, and Minority-owned Business) certification, please provide the tracking number associated with your application.

Exhibit A

Police
330 Sterrett Drive
Public Safety Building, Suite 280
Blacksburg, Virginia 24061
P: (540) 231-6411 F: (540) 951-2803
police.vt.edu

CRIMINAL CONVICTION CHECKS Contractor Checklist

Please review and complete the following in order to request approval of an alternate background check vendor.

_____________________________ __________________________________

Contractor Background Check Vendor Name

Business Address: ____________________________

____

Phone: ____________________________

Website: ____________________________

Service Plan name/level: ______________________

All criminal conviction checks must be concluded before the Contractor's employees gaining access to the Virginia Tech Campus. Employees who have separated employment from Contractor shall undergo another background check before re-gaining access to the Virginia Tech campus. Contractor shall ensure subcontractors conduct similar background checks.

All background checks will include a review of the individual's records to include:

1. Search of primary name and any alias - _______
2. Social Security Number Search - __________
3. Credit Report (if related to potential job duties) - ________
4. Criminal Records Search (any misdemeanor convictions and/or felony convictions are reported) in all states in which the employee has lived or worked over the past seven years - ________
5. the National Sex Offender Registry - ________
6. the Global Watch list (maintained by the Office of Foreign Assets Control of The US Department of Treasury) - ______

(Initial next to each bullet that requirement has been verified with background check vendor or "N/A" if not applicable)

Virginia Tech reserves the right to audit a contractor's background check process at any time.

All employees must self-disclose any criminal conviction(s) occurring while assigned to the Virginia Tech campus. Such disclosure shall be made to Contractor, which in turn shall notify the designated Virginia Tech contract administrator within 5 days. If, any time during the term of the contract, Virginia Tech discovers an employee has a conviction which raises concerns about university buildings, property, systems, or security, the contractor shall remove that employee's access to the Virginia Tech campus, unless Virginia Tech consents to such access in writing. Failure to comply with the terms of this provision may result in the termination of the contract.

I am requesting approval to use a background check vendor other than a vendor that is currently approved by Virginia Tech.

Contractor: (print) _____________________ (Signature) _________________________

I approve _____/ do not approve _____ the use of this background check vendor.

Date: _________________________ (Signature):_______________________________
William M. Babb, Chief of Police:

September 2023

Exhibit B

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
ATTENDANCE ROSTER
NON-MANDATORY PRE-PROPOSAL CONFERENCE

RFP Number 71412503

Date: October 29, 2024 Time: 1:00 PM

PLEASE PRINT

REPRESENTATIVE	COMPANY NAME
Greg Beecher	Virginia Tech
Angela Caldwell	Virginia Tech
Josh Dietrich	
Tara Powers	Powers Resource Center
Ethan Sanders	Sundial Learning Systems
Aaron Schmookler	
Brenda Thompson	NexaLearning

REPRESENTATIVE	COMPANY NAME
Sarah Vergason	Leverage HR
Pete Brown	
Jayson Blair	Goose Creek Consulting
Christine Springer	Rising Culture Group
Beth Laux	Quest Cultural Solutions
Laura Knights	Knights Consulting
Terry Adams	
Cait von Schnetlage	UISAT
Lily Nguyen	Consensus Solutions
Hassan Yemer	SSGC

REPRESENTATIVE	COMPANY NAME
Hali Grantham	
Kaisha McCrea	Growing Perspectives Career Consulting
Ethan Sanders	Sundial Learning Systems
Phillip George	RefineM LLC
John D. Hillman	
Melanie McCoy	Koenig Williams Consulting
Jen Roberts	Difference Consulting
Alex Newman	Boon

REPRESENTATIVE	COMPANY NAME
Joe Street	
Kaela Bazemore	AKA Strategy
Pritha Kakkar	CCS learning
Laura Leonard	Surya Partners, LLC.
Ruby Espana	
Leticia DeSuze	Elite Wealth Enterprises, LLC
Ariana Friedlander	
Robin Shabazz	

REPRESENTATIVE	COMPANY NAME
Patricia Gardner	JUDY CO Inc
Melanie Ryan	MFR Coaching & Consulting
Mark Nicholson	commonsense-consulting
Dave G	
Troy Moore	Rose Group
Crystal Davis	
Jen Pasquale	Lead With Curiosity
Dr. Makesha Spence	DRI Consulting

REPRESENTATIVE	COMPANY NAME
Cathy Dove	
Ivana Anderson	ManpowerGroup/Right Management
Abby Oesterling	goosecreekconsulting
Lori Pyle	Stonewave Leadership LLC
Barbara Basel	Catalyst To Excel
Jackson Wallace	CI International
Dana Felts	KickStart Specialists
Dr. Adrian N. Carter	Carter Development Group

REPRESENTATIVE	COMPANY NAME
Judy Hoberman	
Tricia Exman	Presence Coaching, Inc
Yara Banks	BNX Business Advisors
Candace Nicolls	Envoy Portfolio
Pat Gardner	Judy Co Inc.
Tiffany Prince	Top of the Mountain Leadership
Judy Palmore	
Dianne Ward	OpX Solutions

REPRESENTATIVE	COMPANY NAME
Pete Brown	
Virgil Thornton Sr	CMV Communicators LLC
Francis E. Thomas	Thomas Management Consulting (TMC), LLC
Maris Segal & Ken Ashby	Segal Leadership Global
Joy Papini	CIDIS, LLC
Elizabeth Derby	Fahrenheit Advisors
Melody Gratic, M.Ed,	XcelMil LLC
Kim Major	

REPRESENTATIVE	COMPANY NAME
Tim Jansa	Michiki Morgan International
John D. Hillman	
Sarita Sharma	
Cameron Jackson	The Eremos Group, LLC
Susanne Kastler	AKA Strategy
James M. Burke, PhD,	TEO Consulting, LLC
Jerry Brammer	Rose Group International (RGI)
Dr. Rajanique Modeste	Vestigia Organizational Strategies
Linda Pierce	TEOconsulting

REPRESENTATIVE	COMPANY NAME
Richard Walsh	Table Mountain Consulting Group
Cindy Wilberding	CI International
Susanne Kastler	AKA Strategy
Patricia Gardner	Judy Co, Inc
Adrienne Wise	Wise Choice Counseling and Consulting Services
Judy Kinebrew	JUDYCO Inc
Namita Purohit	
Wendy Greeson	Amplify Your Talent
Dr. Ann Kappel	Alpha Consulting and Coaching, LLC

REPRESENTATIVE	COMPANY NAME
Lonney Gregory	iRIZE Performance Consulting
CEEK LLC	
Dr. Tanji Reed Marshall	Liaison Educational Partners
Dr. Maurine Kwende	EMK Learning Solutions
Namita Purohit	
Angela Hooper	Menifield and Associates
Melva Holt	PAISE LEADERSHIP

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
PROCUREMENT DEPARTMENT

ADDENDUM NO. 2

DATE:	November 19, 2024
TO:	All Offerors
FROM:	Angela Caldwell, Contracting Officer
TOTAL PAGE(S):	1 page (not including attachments)
SOLICITATION TITLE:	Leadership Coaching
SOLICITATION NUMBER:	71412503

I. CLARIFICATIONS AND ADDITIONAL INFORMATION

The due date is being extended to **December 16, 2024 at 3:00 PM**.

Review of proposals will begin January 6, 2025.

STRATEGIC CONSULTING PARTNERS
JAMA ENTERPRISES INC

Request for Proposal 71412503
Leadership Coaching

Virginia Tech

Submitted By:

JAMA Enterprises, dba Strategic Consulting Partners
836 Tamanini Way, Mechanicsburg, Pennsylvania 17055
https://yourstrategicconsultant.com
DUNS Number: [redacted]
CAGE Code: [redacted]
UEI: [redacted]
Corporate Status: SBA 8 (a) Graduated – WOSB
GSA 738X Contract #47QREA20D000D

Primary Points of Contact:

Strategic Consulting Partners
President, Monica Gould, MBA, CMC
717-790-8723 (Office)
[redacted] (Cell)
717-790-8724 (Fax)
monica@yourstrategicconsultant.com

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717-910-1329 (Office)
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tonya@yourstrategicconsultant.com

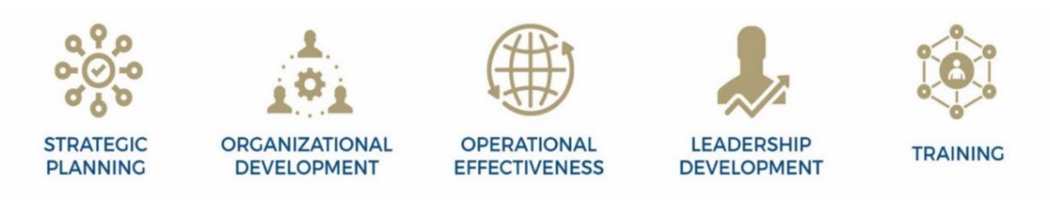
Table of Contents

VII A Specific Requirements

VII A1 Provide a brief description of your organization including experience in leadership coaching with other higher educational institutions. Describe coaching methodologies and approaches.

Description of Organization

Founded in 1994 by Monica Gould in Atlanta, Georgia, JAMA Enterprises, Inc. dba Strategic Consulting Partners (SCP) is a full-service Minority and Woman-Owned management consulting firm located in Mechanicsburg, Pennsylvania. For 30 years, SCP has served clients across all business sectors including federal, state, and local government agencies, nonprofit organizations, corporations, and commercial enterprises. SCP is an award-winning Graduated SBA 8(A) Certified, WOSB and a GSA Schedule Holder. **SCP is an award-winning small business that was named the SBA 2018 Woman-Owned Business of the Year for the Eastern Region of Pennsylvania.** Recently, Monica was named one of six women in the Commonwealth of PA to receive the 2024 Circle of Excellence Award. SCP's specialties are depicted below:



SCP currently employees approximately thirty full and part-time employees and uses approximately sixty, 1099 consultants to complete project work and support our corporate operations. Our team is primarily based in Central PA and the Washington DC area. The executive team includes President Monica Gould, VP Jenny Blom, Chief Learning Officer Annette Cremo, and Chief Development Officer Jasmine Gould. Our operations team includes a Finance Director and an Office Manager, and a Solutions Director focused on business development and quality. The rest of the team provides core services and program management functions. SCP's core team has a majority of women, and employees over 40, and includes minorities.

Strong partnerships with our master trainers, executive coaches, and trusted business partners expand our core capabilities. Developing leaders and working with teams in the public sector has been one of SCP's specialties for more than two decades. We are accustomed to working with all levels within organizations, from senior level executives, supervisors, and managers to aspiring leaders. Our customized programs and services are interactive, engaging, and expertly designed to enhance leaders' current and future performance. SCP's programs help to improve communication and clarify the right mission, vision, and values for our clients, thereby ensuring a healthy culture and a productive workplace.

SCP maintains a top-notch team comprised of master trainers, executive coaches, organizational development experts, and savvy business leaders who are experts in their fields. Because of the diverse experience and expertise that our consultants bring, we can provide practical and applicable knowledge and insights to help organizations move forward and upward, creating human resource shifts that embrace change, resulting in greater cohesion, improved efficiencies, and higher-performing teams.

Experience

Since its inception, SCP has provided leadership development and team building training programs with leaders, teams, and staff across all sectors of business as both a prime contractor and a subcontractor. A few of our government clients include but are not limited to the U.S. Department of

VII A1 Provide a brief description of your organization including experience in leadership coaching with other higher educational institutions. Describe coaching methodologies and approaches.

the Navy, the U.S. Army, U.S. Department of Education, Department of Energy, NRC, HHS, FHFA, FDA, USDA, IRS, FDIC, DOT, USAID, DHS, and HUD. SCP not only supports the U.S. government but also has large contracts to support a variety of state government agencies in Pennsylvania and Virginia including but not limited to the VA State Police, VA Housing, the PA Department of Military and Veterans Affairs, and the PA Department of Conservation and Natural Resources.

SCP has partnered with or worked on projects with many institutions including Shippensburg University, Dickinson College, Penn State University, Tuskegee University, Lakewood University, and Millersville University. SCP has supported many institutes of higher education with strategic planning and training services. Our work with Shippensburg University led to the increase of community programs and services. The SCP team has taught for several universities either as adjunct faculty or trainers for their clients. SCP has done extensive work with Penn State University, George Mason University, Georgetown University, Duquesne University, Dickinson College, Kaplan University, and Touro University. Additionally, our coaching roster includes several coaches who are active adjunct professors as well.

Strategic Consulting Partners has provided executive coaching and training services for a diverse array of clients, including corporate, federal, state, and non-profit organizations, including universities. We work with approximately thirty clients per year with project lengths varying from single-day training and workshops to multi-year awards. The following recent clients best represent similar engagements.

- **U.S. Nuclear Regulatory Commission** – Organizational Development Services, including Executive Coaching and Training
- **Commonwealth of Virginia (VA), Virginia Housing** – Leadership Training, Presentation Training, 360 Assessments, and Executive Coaching Services
- **U.S. Department of Education Office of Special Education and Rehabilitative Services (OSERS)** – 360 Degree Feedback – Action Planning Services
- **USDA Dairy** – Federal Employee Viewpoint Survey Analysis & Recommendations; Employee Engagement Strategy; Leadership Development Training; Executive Coaching, Strategic Planning Services
- **Lakewood University** – Board Training, Accreditation Advisory Services, Strategic Planning
- **Tuskegee University** – Strategic Planning

Coaching Methodologies and Approaches

SCP follows the ICF's philosophy of Professional Coaching, which is defined as: Partnering with Clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. As our firm's name suggests, *Strategic Consulting Partners* is exactly how our team views coaching; SCP will provide expert Professional Coaches who will serve as mentors and advisors to the Federal Leaders who will participate in the coaching program.

The SCP team values and abides by the principles, processes, and competencies of professional coaching as determined by the International Coaching Federation (ICF). The ICF defines coaching as partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential, which is particularly important in today's uncertain and increasingly complex environment. Coaches honor clients as the experts of their own lives and their work, and believe every client is creative, resourceful, and *whole*. Standing on this foundation, the coach's responsibility is to:

VII A1 Provide a brief description of your organization including experience in leadership coaching with other higher educational institutions. Describe coaching methodologies and approaches.

- Discover, clarify, and align with what the client wants to achieve
- Encourage client self-discovery
- Elicit client-generated solutions and strategies
- Hold the client responsible and accountable

This process helps clients dramatically improve their outlook on work and life while improving their leadership skills and unlocking their potential. The SCP process of coaching aligns with and is based on utilizing the eleven core competencies developed by the ICF, which identifies the skills and approaches used in professional coaching. These competencies are grouped into the following four categories, which the SCP team consistently employs: 1) Setting the Foundation; 2) Co-creating the Relationship; 3) Communicating Effectively; and 4) Facilitating Learning and Results.

VII A2 Provide overview of the coaches' qualifications, certificates and expertise in leadership coaching. Providing examples of previous coaching engagements, particularly with organizations of similar size and scope, is strongly encouraged.

Competitive advantage

The SCP team offers multiple advantages over other consultancies and provides the best-value solution to clients:

- **Exceptional Quality of Leadership Coaches:** SCP's team brings an array of experience in industry, government, and nonprofit leadership development services. The highly experienced coaching team selected for this effort has worked with an extensive list of government and nonprofit agencies and have experience with higher education, and each holds numerous sought-after and creditable coaching and facilitation certifications.
- **ICF-Certified Coaches:** All of SCP's coaches are certified coaches through the International Coaching Federation (ICF). SCP's strategic relationship with the ICF's Washington D.C. and Virginia Chapters provides us with the opportunity to work collaboratively with the ICF locally and in other markets where SCP clients are located, to identify qualified resources that meet SCP's exceptionally high standards.
- **Regional Coaching Resource:** SCP's coaches are regionally located in close proximity to its clients to reduce the potential cost of travel when in-person facilitation and coaching is required. SCP's coaches are geographically distributed throughout the United States, with the highest concentration in the mid-Atlantic region as SCP has offices both in Pennsylvania and Virginia. SCP's team is experienced in utilizing the most effective coaching services in a variety of technological settings, including teleconferencing and web conferencing.
- **Customized and Flexible:** SCP's coaches take an individualistic approach to their coaching sessions with participants, making sure that every client is attaining high value out of the SCP experience through targeted assessments and discussions that focus on personal growth.
- **Expertise in Diversity, Equity, and Inclusion (DE&I) and Inter-Generational Coaching:** SCP coaches are well versed in DE&I best practices and support leaders as they embrace programs to ensure a diverse, equitable and inclusive work environment.

SCP's coaching network includes the following **ICF-certified PCC level coaches**, each with at least a bachelor's degree, varied experience working with clients across different sectors and demographics, experienced in training and coaching online as well as in-person, and holding specialized credentials

VII A2 Provide overview of the coaches' qualifications, certificates and expertise in leadership coaching. Providing examples of previous coaching engagements, particularly with organizations of similar size and scope, is strongly encouraged.

and certifications for assessments and coaching techniques. All candidates will be able to conduct coaching sessions in Teams but may have access to other platforms, such as Zoom.

Coach bios have been included in Appendix A.

VII A3 Provide a detailed description of the approach to be taken for individual and group coaching. At a minimum, this description should include a list of tools, techniques and assessment methods. Include the plan for measuring the effectiveness and success of the coaching programs

Individual coaching approach

SCP understands that leaders in higher education need a broad range of leadership competencies These competencies include the ability to think strategically, develop positive relationships, navigate change and conflict, and effectively communicate with and influence a variety of stakeholders including but not limited to elected or government officials and governing boards; faculty, staff, and administration; and members of the local communities, alumni, and industry partners. These competencies can be attained through coaching and training.

Virginia Tech needs coaches that will help participants in the targeted leadership competency areas of the Hokie Dozen and Leadership Excellence program. Through individual assessments, goal setting, coaching sessions, and feedback and reflection. SCP's coaches will facilitate creation of action planning, goal tracking, and be available for ad hoc support and guidance, based on the agreed scope of work for each engagement.

Group coaching approach

In addition to coaching, SCP offers well over 200 off-the-shelf or customizable courses that can be delivered virtually or onsite in a group setting. These courses can be tailored to the specific needs of the university by our chief learning officer and instructional design team. Our 2024-2025 course catalog is available on our website www.yourstrategicconsultant.com.

Moreover, SCP's team members also include organizational resilience advisors who work equip leaders with coping mechanisms in challenging times and preparing them for handling crisis situations, which could include scenarios such as prolonged demonstrations, acts of violence, public relations issues, natural or man-made disasters, cyber threats, and more.

Our team also includes expertise in facilitating change management, guiding succession planning and leadership transitions, designing and orchestrating mentoring programs, and conducting DEI and cultural studies that can uncover structural bias in policies and procedures and foster diverse, inclusive, and equitable workplace and classroom environments.

Tools, techniques and assessment methods

Coaches in our network hold a broad range of certifications to support the breadth of assessments that may be required by the various colleges. Our coaches collectively support numerous individual and team assessment types including but not limited to the following: MBTI, CliftonStrengths, DISC, FIRO-B, TKI, EQI/EQI360, SDI, Hay Group EISC, CCL Benchmarks 360, OPM 360, TESI, 5 Behaviors of a Cohesive Team, Leadership Circle Profile, Leadership Circle Profile, Leadership Practices Inventory, Hogan, Pearman, Change Style Indicator (CSI), Decision Style Profile, Leadership Versatility Index (LVI), Leadership Circle Culture Survey (Team); Harrison, MBTI for Teams, Team Management Profile (TMP),

VII A3 Provide a detailed description of the approach to be taken for individual and group coaching. At a minimum, this description should include a list of tools, techniques and assessment methods. Include the plan for measuring the effectiveness and success of the coaching programs

Strong Interest Inventory, SkillScan, and Polarities. Appendix A describes each coach's certifications and a pricing list for many of the common assessments is shown in the response to section **VII A4**.

Plan for measuring the effectiveness and success of the coaching programs

Coach selection and assignment process

SCP carefully selects coaches to join our network based on certification, past experience, and on-going coaching success and satisfaction. SCP continually recruits and refreshes its list of coaches to ensure we offer a diverse slate of high-performing coaches. Depending on the engagement, we offer a list of coach bios and pictures from which the coachees may choose a preferred and one or more alternate candidates. In some circumstances, the coachees may be asked to answer a brief survey or interview in order to help the program manager recommend a best fit coach. Othe program manager will make the assignment and send an email to introduce the coach and the leader. The coach will regularly report back to the program manager to log hours and report that the coaching sessions are being scheduled and completed as planned.

Approach to managing the contract

For 30 years, Strategic Consulting Partners (SCP) has effectively managed projects of all sizes and scopes in the federal, state, nonprofit, and corporate sectors. SCP will ensure that the quality of project deliverables adheres to Virginia Tech's quality standards. A key focus of our management approach is contract risk mitigation – minimizing contract start-up risk, maximizing contract performance, and guaranteeing contract success.

SCP uses the following process for each engagement.

Task Order Management Process

1	**Intake Form Completed:** Prospective VIRGINIA TECH Internal Organizational Development (OD) sponsor and recipient of potential of OD services submits an intake form to Virginia Tech Program Manager that includes program goals and desired outcomes of the intervention.
2	**Request for OD Services Received:** Virginia Tech Program Manager sends intake form to SCP Program Manager for review and assignment of potential OD engagement. SCP Program Manager may gather more context for the intervention before assigning the appropriate resource.
3	**Intake Call - OD Approach:** SCP's Program Manager and OD Consultant(s) will review the intake form and prepare for a call with the potential recipient of services to gain more clarity on the scope of the engagement and specific outcomes desired from the intervention. The SCP team and the Virginia Tech Program Manager will discuss the best approach to addressing the client needs.
4	**Develop Task Order Proposal:** After the intake call, SCP will draft a Task Order proposal and submit it to Virginia Tech Program Manager; it will include the technical approach to the engagement, proposed key personnel, estimated hours, timeline for project completion, and budget for the engagement.
5	**Task Order Approval:** Virginia Tech Program Manager will review proposed Task Order and provide feedback, revisions, and approval for the Task Order. If needed, Virginia Tech will

VII A3 Provide a detailed description of the approach to be taken for individual and group coaching. At a minimum, this description should include a list of tools, techniques and assessment methods. Include the plan for measuring the effectiveness and success of the coaching programs

	gain feedback from the internal Virginia Tech client for the approach to the intervention. Virginia Tech will notify SCP Program Manager to proceed with the intervention.
6	**Commence Work:** SCP Program Manager will formally notify OD consultant to commence work. SCP OD consultant will schedule project kickoff with project sponsor and team leadership. When/where needed, SCP Program Manager and/or Senior OD Consultant will participate in kickoff meeting.
7	**Monitoring and Quality Control:** SCP Program Manager will provide continuous monitoring and quality control during the intervention to ensure that the timelines, goals, and budget are being met for each Task Order. Where applicable, SCP will gather feedback and evaluations on intervention milestones (i.e., training events).
8	**Bi-monthly Updates:** SCP Program Manager will provide bi-monthly updates to the CFPB Program Manager regarding each active task order.
9	**Task Order Close After-Action Report:** Post intervention, SCP will provide a formal after-action report to the engagement project sponsor and the Virginia Tech Program Manager, which will include engagement overview, outcomes desired, approach taken, outcomes achieved, evaluation results, and next steps and recommendations for the team and Virginia Tech.
10	**Problem Mitigation (As Needed):** Remedy any major issues or changes required throughout the project to ensure the Virginia Tech Program Managers' expectations are being met.

Needs analysis - Depending on the requirements, SCP can design a custom coaching or training package with the desired number of sessions, preferred assessments or curriculum. If SCP is the sole requested bidder on the task order, we will schedule an intake meeting to better understand the requirements and respond to the task order. If the task order is competitive, SCP asks insightful questions to ensure our solution is best matched to the needs and any known budget.

Project management and delivery- SCP assigns a project manager to ensure logistics are handled, whether it is coach matching or scheduling training courses. Each project begins with a kickoff meeting. SCP will work directly with each client for the task order to ensure that we create a process and timeline that will work for the organizations and its participants. Depending on whether each engagement is time and material based or firm fixed price, SCP, tracks and reports on progress and burndown on allotted hours and for longer engagements will hold check-in meetings and ensure risks are addressed. Sample reports are shared in **IV B 7**.

Continuous improvement - SCP offers surveys and evaluations to confirm our consultants are meeting and exceed expectations for performance and that participants feel the services rendered are beneficial. SCP closes the loop on feedback with continuous improvement to incorporate recommendations into courses that will be repeated and ensures we continue to hire and retain the best coaches and trainers that meet the standards of our clients and our management.

Additional description has been provided under the response to **IV C 5**.

Example of your monthly coaching report

For similar engagements, SCP uses a monthly status report to track expenditures and other project data such as:

VII A3 Provide a detailed description of the approach to be taken for individual and group coaching. At a minimum, this description should include a list of tools, techniques and assessment methods. Include the plan for measuring the effectiveness and success of the coaching programs

- Overall Funding
- Administrative/PM Tracking
- Deliverable/Milestones Schedule
- Progress during Reporting Period
- Outstanding, Encountered, and Anticipated Issues
- Staff Hours and Funds Summary
- Contract Ceiling Reconciliation
- Coach Tracking Sheet

This sample monthly report is representative of what Virginia Tech can expect during contract performance but can be customized to meet Virginia Tech needs.

A. Overall Funding:	
1. Total Ceiling Amount (Base + Option #1, #2, #3)	$ 1,808,046.69
2. Total Amount of Funds Obligated to Date (Per Mod P00015)	$ 1,028,842.55
3. Total Amount Invoiced - This Period	$ 17,266.26
4. Total Amount Invoiced - Non-TO Funded	$ 2,946.33
5. Total Amount Invoiced - TO Funded	$ 14,319.93
6. Total Amount Invoiced Inception to Date	$ 951,540.01
7. Total Amount of Funds Committed	$ 983,474.46
8. Total Amount of Funds Re-Committed	$ (23,736.76)
9. Total Amount of Funds Spent (Non-Tasked)	$ 77,081.04
10. Total Amount of Commited & Non-Tasked	$ 1,036,818.73
11. *Percentage* of Funds Expended to Date (Based on Obligated Funds)	101%
12. Balance of Obligated Funds Remaining (Based on Obligated Funds)	$ (7,976.18)

Overall Funding

B. Administrative/PM Tracking/Project Sponsor (Not Funded through Task Orders)

Task/Subtask/Phase	Staff Assigned	Description	Total Invoice Current Month				Total Current Month	Expended To Date
			SR OD/EXEC	PS	PM	Admin		
Contract Maintenance			0.00		1,426.86		1,426.86	38,032.32
MLSR Prep/Invoice/Report						540.60	540.60	9,159.12
Project Pilot Non-Funded							0.00	3,730.79
Meeting							0.00	17,627.43
Total Invoice		**Total Invoiced**	**0.00**	**0.00**	**1,426.86**	**540.60**	**1,967.46**	**81,402.80**

TECHNICAL STATUS

C. Deliverable/Milestones Schedule:
(Any variance in schedule shall be identified and discussed in detail. Discussion shall include the cause for variance, together with any proposed solution to bring the dates within the original planned dates.)

Task/Subtask	Planned Completion Date	Approved Funds Committed	Total Invoiced for Funded Task Orders							Total Current Mth	Expended To Date (Include Current)	Funds Balance	Funds Re-Commit
			PM/PS	SR OD	Exec Coach	JR OD	Admin Asst	SR Facilitator	ODC				
OD30 OI		$ 16,666.98	0.00		305.42					305.42	28,465.64	0.00	11,798.66
OD40 TEAMS NORMS PILOT		$ 11,273.43	0.00	0.00					0.00	0.00	10,084.69	1,188.74	
OD42_OGC		$ 37,105.02	0.00	8,728.90					7,875.27	16,604.17	37,094.46	10.56	
OD43OEDO		$ 18,694.25	0.00	0.00					0.00	0.00	14,495.95	4,198.30	
OD45RIIDISC	12/13/2022	$ 10,878.00		0.00					0.00	0.00	9,678.24	1,199.77	
OD46RIIISDI		$ 19,231.36	0.00	0.00					0.00	0.00	14,073.97	5,157.40	
OD47NSIRDiSC	6/30/2023	$ 9,129.93	0.00	381.78						381.78	3,130.56	5,999.37	
OD48RIIDRMA		$ 29,399.54	0.00	11,224.19	1,527.10	0.00			415.30	13,166.59	22,428.28	6,971.27	
OD49ADMTeam		$ 5,192.14	0.00	152.71						152.71	152.71	5,039.43	
C27AK	11/5/2020	10,624.56	NA	NA	381.78			NA		381.78	10,437.46	187.10	
C34WM	6/6/2021	3,558.24	NA	NA	0.00			NA		0.00	2,909.11	649.13	
C44RT		3,558.24			610.84					610.84	3,943.76	-385.52	
C45MS	6/5/2022	11,499.16			0.00					0.00	7,869.72	3,629.44	
C47JB	4/13/2022	1,186.08			0.00					0.00	963.69	222.39	
C53EB	7/13/2022	3,665.04			305.42					305.42	2,137.94	1,527.10	
C54PK	7/13/2022	3,665.04			0.00					0.00	610.84	3,054.20	
C55SM	10/6/2022	3,665.04			305.42					305.42	2,367.01	1,298.04	
C56BF	10/6/2022	3,665.04			305.42					305.42	2,748.78	916.26	
C57JE	1/4/2024	3,665.04			610.84					610.84	2,596.07	1,068.97	
C58TT	1/17/2024	4,365.04			0.00				0.00	0.00	7,266.53	-2,901.49	
C59JQ	3/15/2024	3,665.04			381.78					0.00	763.55	2,901.49	
C60ML	1/21/2024	3,665.04			610.84					992.62	2,137.94	1,527.10	
	Total Invoice	**1,004,243.39**	**0.00**	**20,487.57**	**5,344.85**				**8,290.57**	**34,122.99**	**939,146.70**	**48,439.32**	**-12,529.70**

Costs by Administrative/PM Tracking and Deliverables Milestone Schedule

VII A3 Provide a detailed description of the approach to be taken for individual and group coaching. At a minimum, this description should include a list of tools, techniques and assessment methods. Include the plan for measuring the effectiveness and success of the coaching programs

OD Coach/Executive Coaching Tracking

Identifier	Coachee/POC	Coach/Lead Consultant	Description	Labor Category	Date Requested by NRC	Consultant Assigned Date	Intake Call Date	Task Order Draft to NRC	NRC Approved Task Order	Anticipated Date of TO Completion	Hours Allocated	$ Allocated	Remaining Funds
C27AK			Executive Coaching	Sr. Executive Coach	8/5/2020	8/10/2020	[redacted]		8/5/2020	9/30/2023	36.00	$ 10,624.56	187.10
C44RT			Executive Coaching	Sr. Executive Coach	12/6/2021	12/6/2021	[redacted]		12/6/2021	6/30/2023	12.00	$ 3,558.24	-385.52
C45MS			Executive Coaching	Sr. Executive Coach	1/5/2022	1/5/2022	[redacted]		1/5/2022	6/30/2023	38.00	$ 11,499.16	3,629.44
C47JB			Executive Coaching	Sr. Executive Coach	4/13/2022	4/13/2022	[redacted]		4/13/2022	7/13/2022	4.00	$ 1,186.08	222.39
C53EB			Executive Coaching	Sr. Executive Coach	8/25/2022	8/25/2022	[redacted]		8/25/2022	7/13/2022	12.00	$ 3,665.04	1,527.10
C54PK			Executive Coaching	Sr. Executive Coach	7/26/2022	7/26/2022	[redacted]		7/26/2022	7/13/2022	12.00	$ 3,665.04	3,054.20
C55SM			Executive Coaching	Sr. Executive Coach	10/6/2022	10/6/2023	[redacted]		10/6/2023	10/6/2023	12.00	$ 3,665.04	1,298.04
C56BF			Executive Coaching	Sr. Executive Coach	10/6/2022	10/6/2023	[redacted]		10/6/2023	10/6/2023	12.00	$ 3,665.04	916.26
C57JE			Executive Coaching	Sr. Executive Coach	11/19/2022	11/21/2022	[redacted]		11/21/2022	6/1/2023	12.00	$ 3,665.04	1,068.97
C58TT			Executive Coaching	Sr. Executive Coach	1/17/2023	1/17/2023	[redacted]		1/17/2023	4/1/2023	12.00	$ 4,365.04	-2,901.49
C59JQ			Executive Coaching	Sr. Executive Coach	2/1/2023	2/6/2023	[redacted]		2/6/2023	3/15/2024	12.00	$ 3,665.04	2,901.49
C60ML			Executive Coaching	Sr. Executive Coach	1/21/2023	1/21/2023	[redacted]		1/21/2023	1/21/2024	12.00	$ 3,665.04	1,527.10
OD40 TEAMS NORMS PILOT			Team Building	Sr. OD Consultant	5/3/2022	5/10/2022			5/3/2022	11/3/2022	38.50	$ 11,273.43	
OD42_OGC Teambuilding			Team Building	Sr. OD Consultant	6/8/2022	7/1/2022					126.00	$ 37,105.02	
OD43OEDO			Organizational Development	Sr. OD Consultant	10/10/2022	10/10/2022					48.50	$ 18,694.25	
OD45RIIDISC			DiSC Training	Sr. OD Consultant	11/10/2022	11/20/2022					28.00	$ 10,878.00	
OD46RIIISDI			Core Strengths Training	Sr. OD Consultant	2/3/2023	2/10/2023					36.00	$ 19,231.36	
OD47NSIR DiSC			DiSC and Teambuilding Retreat	Sr. OD Consultant	2/14/2023	2/28/2023					26.00	$ 9,129.93	
OD48RIIDRMA			Root cause analysis/team building	Sr. OD Consultant	2/13/2023	3/9/2023					31.00	$ 29,399.54	
OD49ADMTeam			Team coaching	Sr. OD Consultant	2/13/2023	3/16/2023					17.00	$ 5,192.14	
Total												$ 1,004,243.39	$ 14,573.67

Organizational Development/Executive Coaching Costs

MONTHLY LETTER STATUS REPORT CON'T

H. Staff Hours & Funds Summary:

Task/Subtask/Phase	Staff Assigned	Option Yr 3 Rate	Total Hours Budgeted	Total Current Invoice Hours	Expended Inception to Date	Total Option Year 3 Expended	Total Invoice this Month	Total Cumulative Funds
OD30 OI								
SR OD Consultant		305.42						
Executive Coach for Leaders		305.42	57	1	88.00	12.5	305.42	28,234.74
Program Manager		158.54	7		1.5		0.00	230.9
OD40TEAMSNORMS								
SR OD Consultant		305.42	37.5			32.5	0.00	9,926.15
Program Manager		158.54	1			1	0.00	158.54
Travel							0.00	0.00
OD42_OGC_Teambuilding								
SR OD Consultant		305.42	34		4.75	34.00	0.00	11,792.76
SR OD Consultant PH2		305.42	25	28.58	0.00	41.83	8,728.90	12,775.72
Executive Coach PH2		305.42	50			13.67	0.00	4,175.09
Program Manager		158.54	4		0.00	3.00	0.00	475.62
Program Manager PH2		158.54	12		0.00		0.00	0.00
Jr. PM		158.54	2				0.00	0.00
Travel							1,315.27	1,315.27
DISC Assessments		3,240.00					6,560.00	6,560.00
OD43OEDO								
SR OD Consultant		305.42	34		0.00	34	0.00	10,384.28
Program Manager		158.54	3		0.00	6	0.00	951.24
Jr. PM		158.54	2				0.00	0.00
Travel							0.00	3,160.43
OD45RIIDISC								
SR OD Consultant		305.42	26			26.25	0.00	8,017.28
Program Manager		158.54	2				0.00	0.00
DISC Assessments		620.00					0.00	1,053.00
Travel		1,000.00					0.00	607.96
OD46RIIISDI								
SR OD Consultant		305.42	34			30.25	0.00	9,238.96
Program Manager		158.54	2			3	0.00	475.62
Travel		700.00					0.00	1,282.76
SDI Assessments		1,080.00					0.00	1,485.00
Training Credits		770.00					0.00	1,100.00
SDI Books		491.63					0.00	491.63
OD47NSIRDiSC								
SR OD Consultant		305.42	24	1.25		10.25	381.78	3,130.56
Program Manager		158.54	2				0.00	0.00
OD48R11DRMA								
SR OD Consultant		305.42	35	36.75		66.75	11,224.19	20,386.79
JR OD Consultant		198.18	6			0.5	0.00	99.09
Program Manager		158.54	5				0.00	0.00
Executive Coach for Leaders		305.42	31	5		5	1,527.10	1,527.10
Travel		415.30					415.30	415.30
360		375.00					0.00	0.00
OD49ADMTeam								
SR OD Consultant		305.42		0.5		0.5	152.71	152.71
Program Manager		158.54					0.00	0.00
C27AK		305.42	36	1.25	29.00	10.00	381.78	10,437.46
C44RT		305.42	12	2.00	3.00	10.00	610.84	3,943.76
C45MS		305.42	38		8.00	18.00	0.00	7,869.72
C47JB		305.42	4		3.25		0.00	963.69
C53EB		305.42	12	1.00		7.00	305.42	2,137.94
C54PK		305.42	12			2.00	0.00	610.84
C55SM		305.42	12	1.00		7.75	305.42	2,367.01
C56BF		305.42	12	1.00		9.00	305.42	2,748.78
C57JE		305.42	12	2.00		8.50	610.84	2,596.07
C58TT		305.42	12			21.50	0.00	6,566.53
	DiSC Assessments						0.00	700.00
C59JQ		305.42	12	1.25		2.50	381.78	763.55
C60ML		305.42	12	2.00		7.00	610.84	2,137.94
Contract (Non-Task)								
PM		158.54		9.00	305.25	52.50	1,426.86	54,865.29
Admin Asst		90.10		6.00	77.00	41.00	540.60	8,955.85
Senior OD Consult/EXEC		305.42			41.25	8.50	0.00	13,752.46
Project Sponsor		231.54			17.50		0.00	3,829.20
Travel								
			Invoice Total	**99.58**	**3,187.60**	**662.25**	**36,090.46**	**1,020,549.76**

Staff Hours and Funds Summary

VII A3 Provide a detailed description of the approach to be taken for individual and group coaching. At a minimum, this description should include a list of tools, techniques and assessment methods. Include the plan for measuring the effectiveness and success of the coaching programs

I. Contract Ceiling Reconciliation

Option Year 3 July 1 , 2022 thru June 30, 2023

LABOR CATEGORY HOUR RECONCILIATION

CLIN	DESCRIPTION	FIXED LABOR RATE	ESTIMATED HOURS	OY 3 Estimated Hours	CLIN Ceiling	Expended Inception to Date Hours	Option Yr 3	Cumulative $	Remaining Bal
00001	Project Manager	158.54	300	150	91,049.96	458.00	73.50	78,389.76	12,660.20
00002	Sr OD Consult/Exec Coach	305.42	2420	1230	1,426,920.51	2,425.60	541.75	840,647.37	586,273.14
00003	Jr OD Consultant	198.18	350	175	132,779.81	107.50	0.50	19,856.41	112,923.40
00004	Sr Facilitator	330.30	40	40	38,311.27	79.00	0.00	25,333.72	12,977.55
00005	Administative Support III	90.10	200	100	34,493.65	77.00	41.00	9,368.10	25,125.55
00006	Project Sponsor	238.49	72	36	33,282.48	36.50	0.00	7,975.95	25,306.53
00007	ODC	2,000.00			31,619.86		0.00	34,017.11	-2,397.25
00008	Travel	5,000.00			20,000.00			10,458.80	9,541.20
			8,321.03	**3,382.00**	**1,808,457.54**	**3,183.60**	**656.75**	**1,026,047.06**	**782,410.32**

Contract Ceiling Reconciliation

Quality Assurance (QA) process

SCP's Quality Assurance (QA) process emphasizes problem avoidance – and anticipates problems before they interfere with the project – by implementing agile techniques. Prior to and during the kickoff, the SCP project team, the contracting authorities, associated stakeholders, and oversight authorities will refine the task order and reporting process that meets the requirements of the RFP and Virginia Tech's operational needs. Throughout the project, SCP will work closely with the Virginia Tech project team to define project milestones and monitor task order activities. Regular check-in meetings, status reports, and readily available access to the SCP Virginia Tech Project Management team ensure that possible roadblocks to success are identified and resolved before they affect the deliverable schedule or budget. Project Leader Monica Gould will also maintain open communication on project progress to the Virginia Tech designated project lead(s) throughout the course of the project. SCP believes progress reports are essential for maintaining a collaborative working relationship with all stakeholders; keeping everyone abreast of progress ensures that the quality of deliverables aligns with or exceeds Virginia Tech's expectations. SCP will lead the project through the following activities:

- **Integrated Team Management with Role Clarity:** All personnel will have clear scopes of work, deliverables, level of effort, and budget – e.g., requirements for monthly financial/performance reporting and flow-down provisions to ensure contract compliance.
- **Program Direction and Impact:** SCP will provide guidance, oversight, and management on program direction; strengthen linkages across program tasks; ensure program impact; monitor issues of emerging importance; provide additionally requested program design; and enhance impact of the project.
- **Quality Assurance/Quality Control:** Regular implementation of quality assurance of task-level activities and delivery of high-quality interventions will ensure alignment with contract goals. Additional resources will be available to offer support during surges in activities to ensure the DOE receives the support required.
- **Problem Identification and Resolution:** SCP proactively identifies problems that may arise (or have arisen) early in the process and provides guidance and solutions for complex problems.
- **Communication:** We ensure, at the organization level, that communication between consultants is strong, priorities are discussed, and issues are raised and resolved.
- **Cost Control:** Weekly, SCP tracks the team's efforts to meet the activities and agreed-upon timelines in the project work plan. If there are any significant deviations, SCP will address them immediately with its staff. Deviations in labor hours of more than 10% will require an explanation.

VII A3 Provide a detailed description of the approach to be taken for individual and group coaching. At a minimum, this description should include a list of tools, techniques and assessment methods. Include the plan for measuring the effectiveness and success of the coaching programs

SCP's management team for this effort includes the following team members:

Monica Gould	President serving as Project Sponsor and Contract Administrator
Dr. Annette Cremo	Chief Learning Officer serving as Coach, Master Trainer and Facilitator, and Sr. Instructional Designer

Our principals are responsible for effective project management and quality of services for all of our engagements including a range of organizational development projects, including organizational assessments, leadership develop and coaching programs, and a wide range of professional development training and team-building programs. Resumes for our principals are included in Appendix B.

VII A4 Clearly break down pricing for individual coaching, group coaching, workshops, assessments and any other relevant services.

Pricing Schedule

Rates are fully burdened and inclusive of all direct and indirect costs, including eVA fees.

Travel expenses are not included in these rates. Should travel be necessary, these costs shall be reimbursed.

Note: Fees vary based on the credentials of the coach.

Table A: PRICING SCHEDULE

SERVICE: FIXED COACHING RATES	Proposed Fixed HOURLY RATE
Coaching Session (per session)	$325-$450/hour session; Higher rate includes 15 minutes prep time.

	ICF ACC	ICF PCC	ICF MCC
In Session Coach Time	$ 325.00	$ 350.00	$ 360.00
Coach Prep Time	$ 81.25	$ 87.50	$ 90.00
Fully Loaded Rate/Hour	$ 406.25	$ 437.50	$ 450.00

Debriefs and/or exit summaries	$325-$450/hour (as agreed based on requirements)

SCP provides a variety of coaching packages that can be custom designed for the client. Examples include:

▪ **Six Month Coaching Program** – includes 6 coaching sessions and DiSC Assessment and project management	$3,090
▪ **Nine Month Coaching Program** – includes 9 coaching sessions, DiSC and 360 assessment and project management	$4,815
▪ SCP's coaches use a variety of **assessments** to support coaching. Each assessment has its own utility.	See a complete list of 2024 assessment and their respective prices on the additional table provided.

SERVICE: GROUP FACILITATION/TRAINING	
Hourly Rate:	$325 – 450 depending on the length facilitation
Note: Project rates based on needs and budget.	SCP provided daily rates; fixed priced project rates based on task order and specific requirements. The below represents pricing for facilitating one off-training programs and do not include customization.
½ day training/facilitation	$3,500
full/day facilitation/training	$5,500
Curriculum development/customization	$125 - $250/ hour depending on the expertise of the designer
Training producer	$125/hour for virtual training

VII A4 Clearly break down pricing for individual coaching, group coaching, workshops, assessments and any other relevant services.

2024 Assessment Pricing

- SCP will use current market rates for assessments and will pass through costs. Costs representative as of 8/20/2024 but are subject to change.
- If we have a coach that is certified, but the coach needs to provide the current pricing, it is TBD.

Assessment	Cost
MBTI	
MBTI®Complete (Form M/Step I™) 161001	$59.95
MBTI® Profile (Form Q/Step II™) 267147	$45.95
MBTI® Interpretive Report (Form Q/Step II™) 26714	$65.95
Strong Interest Inventory® Interpretive Report 284104	$18.95
FIRO-B	$49.95
EQi 2.0:	
Workplace	$76.00
Leadership	$114.00
Group Report	$282.00
EQi 360:	
Workplace	$278.00
Leadership	$358.00
Benchmarks 360 (CCL)	
Execs	$425
Managers	$385
Learning Agility	$125
TESI (Team Emotional & Social Intelligence)	$800*
Leadership Practices Inventory	$300
The Leadership Circle 360	$500
360 Grow Leaders	$375
DISC:	
Workplace Productive Conflict	$120.00
Agile EQ	$150.00
Management	$150.00
Sales Profile	$150.00
Work of Leaders	$150.00
Facilitator Report	$150.00
Group Culture Report	$150.00
5 Behaviors: Personal Dev.	$150.00
5 Behaviors: Team Dev.	$150.00
TKI (Note: This cost is based on TKI Profile and Interpretive Report--248248)	$26.95
Hogan Assessments (for the leadership suite)	$425.00
SDI:	
Assessment	$140.00
Training	$140.00
Strengthsfinder:	
Clifton Strengths 5	$24.99
Clifton Strengths 34	$59.99
For Managers	$49.99
Leadership Circle Profile	$300
Clark-Wilson	TBD
The Workplace Big 5	$29

VII A5 Provide at least three references from previous clients who have engaged in similar leadership coaching services.

U.S. Nuclear Regulatory Commission (NRC)			
Program, Project, Task Title	Organizational Development Services, including Diversity, Equity, and Inclusion Training		
Contract Number	31310019D003		
Customer/Client Organization and Address	Rockville MD		
Customer Reference Contact	[redacted]		
Contract Pricing Type	Task Order Based; Single Award IDIQ SBA 8(A) Sole Source	**Total Dollar Value**	$2,530,647.16
Project Start Date	6/2019	**Project Completion Date**	1 Base year + 4 option years

Performance

Strategic Consulting Partners is currently providing all the Organizational Development support to the U.S. Nuclear Regulatory Commission through a sole source single award IDIQ through the end of the contract period in 2024. SCP is providing organizational development interventions, executive coaching, mentoring programs, leadership development, and customized training across the entire commission.

SCP's contract is intended to help the Office of Chief Human Capital (OCHCO) to lead the whole organization through leadership shifts and industry transitions; build new collaborative and productive teams; create an internal mentoring program; provide succession planning; assess workforce needs; and provide ongoing executive coaching for 15 to 20 senior leaders within NRC at any given time. SCP has a team of 10 executive coaches, trainers, and OD specialists who are supporting the NRC with their diverse needs.

SCP is currently providing the Office of Chief Human Capital (OCHCO) with Diversity, Equity, and Inclusion Training on unconscious bias, as well as cultural assessment services. Currently, Region III of the agency is undergoing this training. Thus far, we have facilitated over 15 different training sessions for NRC staff and leaders. SCP has facilitated in-depth discussions with senior leadership about how to implement the values of diversity, equity, and inclusion in the workplace and determine ways to develop a culture of conversation and openness in talking through challenges and opportunities to support NRC.

Results: Utilization of the Organizational Development contract has been significantly higher than the previous contract. SCP has conducted ongoing executive coaching and 65 interventions consisting of training, team building, and conflict resolution. SCP is assisting NRC with downsizing due to decommissioning. CPAR is available for review.

VII A5 Provide at least three references from previous clients who have engaged in similar leadership coaching services.

USDA Dairy Programs			
Program, Project, Task Title	FEVS Survey Analysis & Recommendations; Employee Engagement Strategy; Leadership Development Training; Strategic Planning Services		
Contract Number	GSA Direct Awards: Project 1: GS-02F-090BA/ Order #12639521F0661 Project 2: 47QREA20D000D/ Order #12639522F0994 Project 3: 47QREA20D000D/ Order #12639522F1117 Project 4: GS-02F-090BA/ Order #12639523F1093 Project 5: GS-02F-090BA/ Order #12639523F1118		
Customer/Client Organization and Address	1400 Independence Ave, SW 1 2968-S. 1 Washington, DC 20250 USDA, AMS, Dairy Programs, USDA APHIS 250 Marquette Avenue Minneapolis, MN 55401		
Customer Reference Contact	[redacted]		
Contract Pricing Type	FFP	**Total Dollar Value**	Project 1: $62,856.00 Project 2: $224,904.31 Project 3: $174,997.74 Project 4: $74.953.79 Project 5: $133,470.35
Project Start Date	Project 1: 06/28/2021 Project 2: 09/29/2022 Project 3: 09/29/2022 Project 4: 9/22/2023 Project 5: 09/28/2023	**Project Completion Date**	Project 1: 06/28/2022 Project 2: 01/28/2024 Project 3: 01/28/2024 (No cost ext: Present) Project 4: 9/30/2024 Project 5: 09/27/2024
Performance			

The following provides examples of five (5) relevant contracts in which the SCP team has provided FEVS Survey Analysis & Recommendations; Employee Engagement Strategy; Leadership Development Training; Strategic Planning Services.

In the past 4 years, the SCP team has supported the USDA AMS Dairy Programs with several services which are described below.

Project 1: In 2021, SCP was asked to focus on providing comprehensive FEVS Analysis and support for leadership to improve employee productivity, morale, and engagement. SCP provided in-depth background analysis for the FEVS data and assessed the organization while drilling down into the organizations that had reportable demographic data. The initial FEVS Analysis led to the second project to explore how to improve the FEVS scores through targeted action planning. Due to the success of this effort, SCP was contracted to support a large follow-up effort described in project 2.

Project 2: In 2022, SCP's second project with the USDA AMS Dairy Program built on the success of the work we began with the GS employees. SCP compared the USDA Dairy Program results with similar organizations within the USDA and across the federal government to help update their Employee Engagement Action Plan through a deep dive into the FEVS analysis developed in project 1. SCP conducted interviews and focus

VII A5 Provide at least three references from previous clients who have engaged in similar leadership coaching services.

groups with the USDA Dairy Program teams across multiple divisions to garner more data on the FEVS scores and overall employee satisfaction. SCP delivered a report of our findings and reviewed the report with leadership to determine key takeaways and specific recommendations on how to improve employee engagement. The project expanded the assessment to include the Market Administration portion of the workforce. In addition to the FEVS analysis, SCP developed a training needs assessment whereby we identified contract learning needs and paths for employees. Within this project, SCP defined the Human Capital Strategy for the USDA Dairy staff. SCP also developed and delivered 10 tailored training programs focused on improving employee engagement. These strategic human capital goals were then used and integrated in the strategic plan under project #3.

Project 3: SCP is formulating the USDA AMS Dairy Program's strategic plan for the next five years. In this project, SCP engaged internal and external stakeholders to identify the strategic themes. Through several facilitated workshops with internal stakeholders, SCP is defining the strategic goals, objectives, and priorities for the USDA Dairy Program. Strategic Planning support includes but not limited to project planning, data collection and analysis (including stakeholder interviews, surveys, focus groups), facilitated leadership workshops that develop strategic initiatives and priorities, development of strategic plan, and implementation services including quarterly plan reviews and coaching after plan completion.

Project 4: SCP developed the Strategic Plan for the USDA Dairy Program Market Services as a deeper dive into the overall AMS Dairy Program Strategic planning effort in project 3. This program focuses on all the Marketing materials and products that are represented by the USDA Dairy Program i.e., milk products, farmer services, etc. SCP provided a detailed action strategy, S.W.O.T Analysis, established strategic priorities, goals, and objectives, and coordinated with leadership and key stakeholders to develop a comprehensive strategic plan for this division of the Dairy Program. Additionally, we provided implementation support through development of an action tracker dashboard which set goals and timelines to implement each major activity outlined. SCP also conducted one-on-one coaching services for one-senior level managers (GS-15) and two-junior level managers (GS-14) with 10 virtual coaching sessions and 360 assessments facilitated for the junior level managers.

Project 5: As additional support for Project 4, SCP continued to provide Strategic Planning Support for the Dairy Program Market News through facilitating team building and communication related workshops focused on utilizing DiSC and 360 assessments for more of the Market service leaders and staff. SCP provided executive coaching sessions, and follow-up assessment/evaluation of participants for the Dairy Program Deputy Administrator. The program was delivered to 12 senior executive level managers (GS-15), 10 junior level managers (GS-14), and 10 mid-level managers (GS-13).

Results: : Work has been expanding since 2019 when SCP was engaged to assist with an assessment of their slowly declining FEVS score's root causes. SCP has conducted training for leaders and emerging leaders. We provided DiSC analysis and training for all staff. FEVS scores have been rising since our engagement, and in 2023, there was a 20% increase in one year due to our ongoing work. The USDA Dairy Program's leadership team has requested additional training and coaching services in 2024. SCP delivered one cohort of a pilot leadership development program for emerging leaders in early 2024. Additionally, Individual orders have contracted DiSC training and coaching services in 2024 under separate vehicles. SCP recently won competitive bids to deliver Emerging Leader and Supervisory Emerging Leader Programs for the Dairy Program which will be launched in 2025 with one base year plus four options years.

VII A5 Provide at least three references from previous clients who have engaged in similar leadership coaching services.

Commonwealth of Virginia (VA), Virginia Housing			
Program, Project, Task Title	Leadership Training, Presentation Training, 360 Assessments, and Executive Coaching Services		
Contract Number	Direct Request Purchase Orders – Master Services Agreement		
Client Address	Richmond, VA		
Contact	[redacted]		
Contract Pricing Type	Master Services Agreement	**Total Dollar Value**	$275,000
Project Start Date	12/2018	**Project Completion Date**	Present

Performance

Strategic Consulting Partners has a Master Services Agreement with Virginia Housing to provide leadership training, leadership assessments, and executive coaching services for leaders at all levels of the organization. SCP supports different leadership team cohorts through facilitated leadership development training programs that span a series of topics and include leadership assessments. Below are a few select examples of Task orders that SCP has supported for VA Housing:

Project 1: SCP provided presentation skills training to Virginia Housing (formally Virginia Housing Development Authority) leadership program participants. SCP helped participants develop skills to know and engage their audience, communicate key messages, understand different presentation types, and use different presentation tools. Participants built on their known MBTI and communication styles and learned how to conduct an audience analysis. At the end of this course, participants were able to:

- Create presentations tailored to different audiences
- Utilize effective verbal and non-verbal communications skills to actively engage adult learners
- Create a message that resonates and engages the audience.
- Control and manage nervousness for effective delivery of presentations
- Apply best practices when utilizing visual aides to enhance presentations

Project 2: SCP provides a wide range of leadership training, including presentation skills training, leadership assessments, 360-degree assessments and executive coaching services for Virginia Housing. Over the past 5 years, SCP has delivered a dozen training leadership programs.

Project 3: SCP provides ongoing leadership and management coaching services to leaders at different levels of the organization. SCP coaches have coached over 60 leaders with a diverse team of coaches.

Project 4: SCP facilitated virtual training for leadership and staff on Surviving and Thriving in a V.U.C.A. (Volatility, Uncertainty, Complexity and Ambiguity) Environment. Most recently, SCP provided this training in person with resounding success.

Project 5: SCP facilitated a second iteration of the leadership cohort style "Presentations Skills" training program over several months with 12 employees.

Project 6: SCP is facilitating several team-building sessions with three different teams at Virginia Housing using the Strength Deployment Inventory (SDI 2.0). Each leader within the team is receiving executive coaching. Over the past three years, SCP provided similar team-building programs to nearly a dozen teams.

Results: SCP's training programs have been well-received by the leadership cohort.

VII A5 Provide at least three references from previous clients who have engaged in similar leadership coaching services.

"SCP is Virginia Housing's trusted learning, OD, and coaching partner. We are extremely pleased with the high-quality work and sensitivity that SCP provides and turn to them for work that requires skill and knowledge. After a very well-received training program delivered in 2018 by Monica Gould, Virginia Housing decided to engage with SCP in a 5-year master service agreement. SCP now provides training, team building, and executive coaching to our team members. The SCP team of facilitators and coaches has all been exceptional. We look forward to working with SCP for years to come. We recommend them very highly."

Michelle Prosser, Director of Talent Development and Learning, Virginia Housing

Lakewood University			
Program, Project, Task Title	Strategic Planning, Board Training		
Contract Number	N/A		
Customer/Client Organization and Address	2231 North Taylor Road, Cleveland Heights, OH 44112		
Customer Reference Contact	[redacted]		
Contract Pricing Type	*Firm Fixed price*	**Total Dollar Value**	$25K
Project Start Date	October 2022	**Project Completion Date**	February 2023
Performance			

SCP supported Lakewood University by providing comprehensive consulting services, including evaluating and recommending enhancements to current policies and systems according to best practices in nonprofit management, as well as board governance and operations policies and systems. Lakewood's leaders also engage SCP to guide them in completing a self-assessment of the Standards for Excellence review process, after having received notice of its re-accreditation with the Department of Education. During its review process, in collaborati with SCP, Lakewood's leadership team reviewed all 58 requirements and provided written policies or explanatior of why the requirement was not applicable, which were provided to the Standards review committee for their oversight. Recently SCP completed a strategic planning project for the client in which SCP developed a robust strategic plan to ensure long-term sustainability and programmatic effectiveness.

VII A6 Participation of Small, Women-owned and Minority-owned Business (SWAM) Business

SCP is a currently certified SWaM business and will maintain certification for the life of the contract.

COMMONWEALTH OF VIRGINIA

DEPARTMENT OF SMALL BUSINESS & SUPPLIER DIVERSITY

101 N. 14th Street, 11th Floor
Richmond, VA 23219

JAMA ENTERPRISES, INC.

Trade Name: Strategic Consulting Partners

is a certified Small,Women Owned,Minority Owned Business meeting all the eligibility requirements set forth under the Code of Virginia Section 2.2-16.1 et seq. and Administrative Code 7VAC 13-20 et seq.

Certification Number [redacted]
Valid Through: Jul 31, 2028

Accordingly Certified

Willis A. Morris

Willis A. Morris, Director

CERTIFIED SWaM Small, Women and Minority-Owned
Supplier Diversity Strengthens the Commonwealth
by the Virginia Department of Small Business & Supplier Diversity

VII A7 The return of the Submission Instruction page and addenda, if any, signed and filled out as required.

RFP # 71412503, Leadership Coaching

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until November 18, 2024 at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Angela Caldwell, Phone: (540) 231-1269 e-mail: acaldwell@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by 2:00 PM on November 4, 2024. Inquiries must be submitted to the procurement officer identified in this solicitation.

VIRTUAL PRE-PROPOSAL CONFERENCE: A pre-proposal conference will be held on October 29, 2024 at 1:00 PM. See RFP Section IX, Pre-proposal Conference for additional information.

PROPOSAL SUBMISSION:

****Please note, proposal submission procedures have changed effective March 2023.***

Proposals may NOT be hand delivered to the Procurement Office.

Proposals should be submitted electronically through Virginia Tech's procurement portal. This portal allows you access to view business opportunities and submit bids and proposals to Virginia Tech digitally and securely.

Proposals must be submitted electronically at:
https://bids.sciquest.com/apps/Router/PublicEvent?CustomerOrg=VATech

Vendors will need to register through this procurement portal, hosted by Jaggaer. **It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions**. Registration is easy and free. If you have any challenges with the registration process, please contact Jaggaer Support at 1-800-233-1121 or procurement@vt.edu.

Click on the opportunity and log in to your vendor account to begin preparing your submission. Upon completion, you will receive a submission receipt email confirmation. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 50MB in order to be received by the University.

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

AUTHORIZED SIGNATURE: Monica A. Gould Date: 12/16/2024

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
PROCUREMENT DEPARTMENT

ADDENDUM NO. 1

DATE:	November 11, 2024
TO:	All Offerors
FROM:	Angela Caldwell, Contracting Officer
TOTAL PAGE(S):	9 pages (not including attachments)
SOLICITATION TITLE:	Leadership Coaching
SOLICITATION NUMBER:	71412503

I. CLARIFICATIONS AND ADDITIONAL INFORMATION

The due date has been revised to **November 22, 2024.**

Please reference the Hokie Dozen here.

Please reference the Leadership Excellence here.

Exhibit A - Criminal Conviction Checks Contractor Checklist

Exhibit B – Attendance Roster

Proposers are advised that this RFP seeks to make Leadership Coaching/Training options available to the University. These services will be utilized on an As-Needed basis and no minimum amount of business is guaranteed. Because of this, it is not possible to project specifics about the number of sessions or the specific requirements/scheduling of those sessions.

II. REQUESTS FOR INFORMATION

1. Can the coaching services such as coaching sessions (individual or group) and leadership workshops be provided in person as well as virtually?
   Virginia Tech Response: Yes, we would prefer both options to be available.

2. Is there specific assessment tools Virginia Tech is interested in?
   Virginia Tech Response: We currently have MBTI, TKI, FIRO-B, EQi360, CliftonStrengths, and KAI assessments that we use. We are not opposed to these being used in the Leadership Coaching, but are open to others that coaches may want to use.

3. Is there an incumbent providing these services?

   Virginia Tech Response: There are no incumbents for this service.

4. Do you anticipate selecting multiple qualified vendors through this procurement process? If so, would Va Tech faculty, staff, and administrators then be able to choose from the approved vendors?

   Virginia Tech Response: Please refer to Section VIII.B. Also, each awarded vendor will be available for use by campus.

5. Is there an estimate of the number of leaders who may need individual coaching and/or group coaching, and how they will be referred to services?

   Virginia Tech Response: At this time, we do not have an estimated number of individuals listed for this service. This agreement will be available for use by campus on as As-Needed basis.

6. Would we have an opportunity to assist with sharing about our services to leaders or individual departments within Virginia Tech?

   Virginia Tech Response: Yes, this would need to be coordinated with the departments after award is made.

7. Is there a timeline for Workshops to be offered? For example, is there a target for the number of sessions to be offered and how often these sessions will be offered? Will it be for a cohort of leaders who attend sessions together, or can participants take individual sessions?

   Virginia Tech Response: There is not a timeline for this. It will be based more on requests/demands by leaders/departments.

8. Are the coaching or workshops mandated by performance requirements or will participants opt in as needed?

   Virginia Tech Response: This would be an opt in function and not mandatory.

9. Are you seeking x-number of hours per week, monthly, or quarterly per sessions as-needed throughout the year?

   Virginia Tech Response: There is not currently a minimum or a maximum number of hours we are seeking.

10. Group Coaching: How many leaders are you requesting to be included in group coaching? This is important as effective group teaching of groups between 12 - 17 individuals are ideal for leadership.

    Virginia Tech Response: Maximum number of individuals for a group coaching should be identified by the provider.

11. Group Coaching: How many sessions collectively are you wanting the groups to meet (monthly, quarterly, semi-annually)?

Virginia Tech Response: There is not a set parameter we are seeking on the frequency or number of sessions.

12. Workshop & Development Programs: Are you requiring printed material such as handouts, printed exercises, or workbook activities?

    Virginia Tech Response: We are not requiring printed materials, but digital versions are helpful. However, what is needed, should be determined by the provider.

13. Workshop & Development Programs: How long are you seeking the workshop sessions (e.g., weekly, monthly, quarterly?)

    Virginia Tech Response: There is not a set amount of time or number of sessions.

14. Ongoing Support: Are you referring to indefinite support in between sessions? Evening? Weekends?

    Virginia Tech Response: No, this is not an indefinite level of support. The provider should determine when they are/are not available (including evenings & weekends) and what time zone as this would be important to know for employees seeking services.

15. Who is the contractor vendor that supports the University's criminal background check?

    Virginia Tech Response: Virginia Tech utilizes Truescreen, Inc. However, there will be requirements in order to use Truescreen. If the requirements are not met, you may submit a **Criminal Conviction Checks Contractor Checklist** provided below to the buyer. Once completed, the form will undergo review and approval by the Virginia Tech Police Department.

16. Section IV. 4.a: Is there a particular Assessment favored by VT or can options be proposed?

    Virginia Tech Response: We are a Strengths campus, but other than that, there is no preferred assessment.

17. Section VII. A. 4: Is The Pricing Breakdown for the Base Year only, or should anticipated Option Years Pricing be included?

    Virginia Tech Response: Please provide your breakdown of pricing for all services you are proposing to offer. Pricing shall remain the same for the initial term. At the time of renewal, offerors are able to propose a price adjustment but supporting documentation will be required. This will be further addressed during negotiations.

18. What is the anticipated time for delivery - how long are you thinking coaching will be offered?

Virginia Tech Response: Timeframe options should be determined by the coach, but adjustable based on client needs and available resources (e.g., amount of time and costs).

19. Are you open to vendors not from Durham, Richmond, Charlottesville, Raleigh, Washington?

    Virginia Tech Response: Yes.

20. Do you recognize small and minority business certifications outside from states outside of Virginia - Our firm is in Florida? (Reciprocity) - Do you recognize federal 8(a) as part of SWAM.

    Virginia Tech Response: Eligibility criteria for SWaM Certification is managed by the Virginia Department of Small Business and Supplier Diversity (SBSD). Please visit their website at https://sbsd.virginia.gov for more information about whether your company qualifies for certification.

21. Can you provide more detail on how Virginia Tech evaluates SWAM participation? What level of involvement or contribution from SWAM vendors is expected?

    Virginia Tech Response: Virginia Tech does not have a stated goal but we encourage the majority of firms to utilize SWaM to the greatest extent possible. Please reference Section II of the RFP.

22. Is there a preferred format or structure for the proposals, beyond what is outlined in the RFP?

    Virginia Tech Response: There is no preferred structure/format beyond what is outlined in the RFP document. Please submit in the format you believe best communicates the services you are offering.

23. What is the level of leader that will be eligible to receive these services?

    Virginia Tech Response: All levels of the organization from senior leader to front line manager.

24. How many hours will be included in each individual coaching session and should there be provision for preparation hours?

    Virginia Tech Response: No set parameters on the number of hours for coaching, but prep time should be set into the structure/pricing offered by provider.

25. What is the estimated number of executive coaching sessions, leadership development workshops, and assessments that will be ordered?

    Virginia Tech Response: Virgnia Tech cannot guarantee any amount of business.

26. Will participation in developmental activities be voluntary?

    Virginia Tech Response: Yes

27. How many leaders will participate in this engagement? Would all participating leaders receive *all* provided services (one-on-one coaching, group coaching, workshops, etc.)?

    Virginia Tech Response: This is subject to request/need and is not currently known how many will participate.

28. How many group coaching sessions are envisioned in the scope of this effort?

    Virginia Tech Response: There is not an estimate on how many group sessions may be requested.

29. Would there be any connection between the one-on-one coaching and the group coaching? Would the one-on-one coaching be used to supplement the material for group coaching sessions, or would these two offerings be completely separate?

    Virginia Tech Response: It's expected that most of this would be separate, but an option for a coach to recommend a group session w/ certain individuals may be of value.

30. Will Va Tech provide the audio/visual equipment, meeting space (flip charts, markers, etc?)

    Virginia Tech Response: The awarded vendor(s) will be provided with access to a designated meeting space. Should system integration be required, the vendor(s) must undergo a security database process, which will subsequently need approval from our IT department.

31. Does the Economically Disadvantaged Women Owned Small Business (EDWOSB) Certification Awarded by the U.S. Small Business Administration satisfy your SWAM requirement?

    Virginia Tech Response: No, in order to receive all 10 points, you must be Virginia Certified SWaM. Please reference Section II of the RFP for more information.

32. Given potential challenges with scheduling, what is the expectation in terms of number of group coaching sessions and workshops?

    Virginia Tech Response: This would primarily be determined between the coach and the employee.

33. What is the vision for the work to be continued within the yearly renewals? We understand they are optional, however any ideas would help inform the approach for the first year (even as a discrete offering).

Virginia Tech Response: Virginia Tech may consider a variety of criteria in determining interest in optional renewals including, but not limited to, satisfaction with services provided.

34. Have any of these individuals received coaching in the past? If yes, can you provide details?

    Virginia Tech Response: Coaching has not been a centralized resource available in the past, so it is unknown what coaching individuals have received.

35. What metrics did you use to measure success? Have you defined metrics for how you will evaluate the success of the coaching engagements? If yes, what are they?

    Virginia Tech Response: Positive evaluations and repeated use of coaches would be metrics used to evaluate the success.

36. Have you determined how many sessions and length of sessions you want to take place over the anticipated period?

    Virginia Tech Response: No determined number of sessions or length.

37. Do you have a process for matching coaches with leaders? If yes, what is it?

    Virginia Tech Response: Individuals who are looking for a coach will be provided information about available coaching companies via a VT website. Instructions and what is important to be known for scheduling a coach will be included on the website (e.g., how to pay for services, discussing number of sessions, etc.).

38. What technology do you use for online meetings (zoom, google meets, teams, etc.)? Do you have a preference of what is used for any remote sessions?

    Virginia Tech Response: No preference, currently the University uses both Zoom and MS Teams.

39. The RFP states the coaching should be focused on areas of leadership including emotional intelligence, strategic thinking, team management, communications and decision making. What percent of the coaching plan should focus on these specific areas versus other personal needs and opportunities that result from an assessment or personal area of interest?

    Virginia Tech Response: As this is the first time providing this service, we do not have percentages available on these various topics.

40. How, if at all, do you see the individual manager being involved in the coaching process (e.g., meet with client and coaches to discuss priorities, review 360 participant names if using 360, meet at the end of coaching to discuss progress)?

Virginia Tech Response: If the employee chooses to include the manager, that would be fine. Otherwise, we do not expect them to be involved in the process other than if a 360 assessment tool is used.

41. What if any drivers are there for this request (e.g. received a grant, growing a high potential leader, addressing performance issues, wanting to take performance / DEI to the next level)?

    Virginia Tech Response: The driver for this request is based on the request for these types of services, observing the growing need for leadership coaching, and to help improve overall performance.

42. Can we bid on specific parts of the proposal? (i.e. 1:1 coaching and group coaching only?)

    Virginia Tech Response: Yes.

43. Do you differentiate training by level? Front line, management, top executives

    Virginia Tech Response: We don't necessarily differentiate by level, but based on competency need. It is important to remember the target audience and their skill set.

44. Do you have leadership competencies defined? Is your leadership training delivered based on those competencies?

    Virginia Tech Response: Please reference the leadership competencies here. The competencies, what we call the Hokie Dozen, are integrated into the topics of discussion for our cohort based leadership program and beyond.

45. Do you currently utilize an employee opinion survey? If yes, how often does it run and what areas does it focus on?

    Virginia Tech Response: We use a learners survey for post training, a LMS customer survey, and a Climate Survey with employees.

46. Will VT pay travel costs? If so, should we include forecasted travel costs in our estimate? Will contractors in the immediate Blacksburg, VA, area be considered preferred vendors due to their proximity to the University?

    Virginia Tech Response: In the event that travel is required, travel shall be reimbursed by the GSA per diem rates. Travel documentation must be provided. Geographic location is not a factor that is used to score proposals, however overall cost will be taken into consideration.

47. In addition to the requirements noted on pages 5 and 6 of the RFP, is Virginia Tech amenable to a needs analysis and the costs associated with this analysis to pinpoint the specific leadership issues being addressed, identify desired changes in the current culture, and address any underlying causes of leadership issues?

Virginia Tech Response: There is not capacity to do a needs analysis across the university at this time. It is something that we will likely conduct ourselves as we integrate leadership coaching into our culture and complete current leadership training through our second cohort of our Leadership Excellence program.

48. Will this work only occur at the Blacksburg Campus, or do you anticipate some coaching at satellite campuses such as Roanoke and the Washington, DC, area?

    Virginia Tech Response: Virginia Tech is interested in establishing services for all locations. If there are limitations on where your services can be provided, please provide that detail in your proposal.

49. Under "Ongoing Support and Accountability," the RFP mentions, "Offer continuous support to participants throughout the coaching engagement to ensure progress toward established goals." Do you envision the coaching centering around development goals for each individual and/or performance goals that support the University's strategy and mission and the unit-level plans that are available online?

    Virginia Tech Response: Goals should be a concise part of the coaching plan with employees.

50. Do you have a budget or not-to-exceed amount for this work?

    Virginia Tech Response: No amount of business is guaranteed to any vendor that is awarded a contract. This will be as needed contract.

51. Are there specific competencies / skills that are expected to be a part of the coaching program?

    Virginia Tech Response: The Hokie Dozen should be the competencies that are focused on in the coaching program.

52. Do you have an expected frequency for the trainings? Is there an approximate number of sessions you would like the consultant to conduct? Would you be able to provide a breakdown in the frequency and number of sessions by service?

    Virginia Tech Response: There is not a minimum/maximum number of sessions that we are requiring, but it may be limited by the employee in regard to their availability and resources.

53. Insurance Coverage: Can you please explain if all of these listed are required for this RFP?

    Virginia Tech Response: This language is used for all Virginia Tech public solicitations and may not be applicable for all situations. This can be discussed during negotiations if revisions need to be made.

54. Does Virginia Tech participate in Cooperative Procurement Agreements for similar services within the state of Virginia?

    Virginia Tech Response: Virginia Tech has the option to utilize cooperative contracts, if you have a cooperative contract you believe may be of interest to the University you may include reference to it in your proposal.

55. Are there any preferred or required credentials for coaches or facilitators?

    Virginia Tech Response: Please list your certifications, education, training etc. that has prepared you to do leadership coaching.

56. We believe we will need to include the cost for background checks. If yes, how much does it cost per person if we were to use your VA Tech partner?

    Virginia Tech Response: Virginia Tech's designated partner for this service is Truescreen, Inc. If you intend to engage an alternate vendor, you are required to complete the **Criminal Conviction Checks Contractor Checklist** provided below. Once completed, please submit the form to the buyer. Following submission, the form will undergo review and approval by the Virginia Tech Police Department.

57. Would you consider a pricing structure with multiple tiers for our coaches and facilitators?

    Virginia Tech Response: Tiered pricing is acceptable.

58. I am part of the VA state business registry. Is this acceptable or do you need additional certifications.

    Virginia Tech Response: Please provide documentation of any certifications or credentials you have obtained to qualify as a leadership coach. Additionally, if you are a Virginia certified small business vendor, kindly include a copy of your certification with your proposal. If you are currently in the process of applying for the SWaM (Small, Women-owned, and Minority-owned Business) certification, please provide the tracking number associated with your application.

Exhibit A

VIRGINIA TECH.

Police
330 Sterrett Drive
Public Safety Building, Suite 280
Blacksburg, Virginia 24061
P: (540) 231-6411 F: (540) 951-2803
police.vt.edu

CRIMINAL CONVICTION CHECKS Contractor Checklist

Please review and complete the following in order to request approval of an alternate background check vendor.

_____________________________ _________________________________

Contractor Background Check Vendor Name

Business Address: ___________________________

____

Phone: ___________________________

Website: ___________________________

Service Plan name/level: _____________________

All criminal conviction checks must be concluded before the Contractor's employees gaining access to the Virginia Tech Campus. Employees who have separated employment from Contractor shall undergo another background check before re-gaining access to the Virginia Tech campus. Contractor shall ensure subcontractors conduct similar background checks.

All background checks will include a review of the individual's records to include:

1. Search of primary name and any alias - _______
2. Social Security Number Search - __________
3. Credit Report (if related to potential job duties) - ________
4. Criminal Records Search (any misdemeanor convictions and/or felony convictions are reported) in all states in which the employee has lived or worked over the past seven years - ________
5. the National Sex Offender Registry - ________
6. the Global Watch list (maintained by the Office of Foreign Assets Control of The US Department of Treasury) - ______

(Initial next to each bullet that requirement has been verified with background check vendor or "N/A" if not applicable)

Virginia Tech reserves the right to audit a contractor's background check process at any time.

All employees must self-disclose any criminal conviction(s) occurring while assigned to the Virginia Tech campus. Such disclosure shall be made to Contractor, which in turn shall notify the designated Virginia Tech contract administrator within 5 days. If, any time during the term of the contract, Virginia Tech discovers an employee has a conviction which raises concerns about university buildings, property, systems, or security, the contractor shall remove that employee's access to the Virginia Tech campus, unless Virginia Tech consents to such access in writing. Failure to comply with the terms of this provision may result in the termination of the contract.

I am requesting approval to use a background check vendor other than a vendor that is currently approved by Virginia Tech.

Contractor: (print) ______________________ (Signature) __________________________

I approve _____/ do not approve _____ the use of this background check vendor.

Date: __________________________ (Signature):_________________________________
William M. Babb, Chief of Police:

September 2023

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
An equal opportunity, affirmative action institution

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
ATTENDANCE ROSTER
NON-MANDATORY PRE-PROPOSAL CONFERENCE

Exhibit B

RFP Number 71412503

Date: October 29, 2024   Time: 1:00 PM

PLEASE PRINT

REPRESENTATIVE	COMPANY NAME
Greg Beecher	Virginia Tech
Angela Caldwell	Virginia Tech
Josh Dietrich	
Tara Powers	Powers Resource Center
Ethan Sanders	Sundial Learning Systems
Aaron Schmookler	
Brenda Thompson	NexaLearning

REPRESENTATIVE	COMPANY NAME
Sarah Vergason	Leverage HR
Pete Brown	
Jayson Blair	Goose Creek Consulting
Christine Springer	Rising Culture Group
Beth Laux	Quest Cultural Solutions
Laura Knights	Knights Consulting
Terry Adams	
Cait von Schnetlage	UISAT
Lily Nguyen	Consensus Solutions
Hassan Yemer	SSGC

REPRESENTATIVE	COMPANY NAME
Hali Grantham	
Kaisha McCrea	Growing Perspectives Career Consulting
Ethan Sanders	Sundial Learning Systems
Phillip George	RefineM LLC
John D. Hillman	
Melanie McCoy	Koenig Williams Consulting
Jen Roberts	Difference Consulting
Alex Newman	Boon

REPRESENTATIVE	COMPANY NAME
Joe Street	
Kaela Bazemore	AKA Strategy
Pritha Kakkar	CCS learning
Laura Leonard	Surya Partners, LLC.
Ruby Espana	
Leticia DeSuze	Elite Wealth Enterprises, LLC
Ariana Friedlander	
Robin Shabazz	

REPRESENTATIVE	COMPANY NAME
Patricia Gardner	JUDY CO Inc
Melanie Ryan	MFR Coaching & Consulting
Mark Nicholson	commonsense-consulting
Dave G	
Troy Moore	Rose Group
Crystal Davis	
Jen Pasquale	Lead With Curiosity
Dr. Makesha Spence	DRI Consulting

REPRESENTATIVE	COMPANY NAME
Cathy Dove	
Ivana Anderson	ManpowerGroup/Right Management
Abby Oesterling	goosecreekconsulting
Lori Pyle	Stonewave Leadership LLC
Barbara Basel	Catalyst To Excel
Jackson Wallace	CI International
Dana Felts	KickStart Specialists
Dr. Adrian N. Carter	Carter Development Group

REPRESENTATIVE	COMPANY NAME
Judy Hoberman	
Tricia Exman	Presence Coaching, Inc
Yara Banks	BNX Business Advisors
Candace Nicolls	Envoy Portfolio
Pat Gardner	Judy Co Inc.
Tiffany Prince	Top of the Mountain Leadership
Judy Palmore	
Dianne Ward	OpX Solutions

REPRESENTATIVE	COMPANY NAME
Pete Brown	
Virgil Thornton Sr	CMV Communicators LLC
Francis E. Thomas	Thomas Management Consulting (TMC), LLC
Maris Segal & Ken Ashby	Segal Leadership Global
Joy Papini	CIDIS, LLC
Elizabeth Derby	Fahrenheit Advisors
Melody Gratic, M.Ed,	XcelMil LLC
Kim Major	

REPRESENTATIVE	COMPANY NAME
Tim Jansa	Michiki Morgan International
John D. Hillman	
Sarita Sharma	
Cameron Jackson	The Eremos Group, LLC
Susanne Kastler	AKA Strategy
James M. Burke, PhD,	TEO Consulting, LLC
Jerry Brammer	Rose Group International (RGI)
Dr. Rajanique Modeste	Vestigia Organizational Strategies
Linda Pierce	TEOconsulting

REPRESENTATIVE	COMPANY NAME
Richard Walsh	Table Mountain Consulting Group
Cindy Wilberding	CI International
Susanne Kastler	AKA Strategy
Patricia Gardner	Judy Co, Inc
Adrienne Wise	Wise Choice Counseling and Consulting Services
Judy Kinebrew	JUDYCO Inc
Namita Purohit	
Wendy Greeson	Amplify Your Talent
Dr. Ann Kappel	Alpha Consulting and Coaching, LLC

REPRESENTATIVE	COMPANY NAME
Lonney Gregory	iRIZE Performance Consulting
CEEK LLC	
Dr. Tanji Reed Marshall	Liaison Educational Partners
Dr. Maurine Kwende	EMK Learning Solutions
Namita Purohit	
Angela Hooper	Menifield and Associates
Melva Holt	PAISE LEADERSHIP

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
PROCUREMENT DEPARTMENT

ADDENDUM NO. 2

DATE:	November 19, 2024
TO:	All Offerors
FROM:	Angela Caldwell, Contracting Officer
TOTAL PAGE(S):	1 page (not including attachments)
SOLICITATION TITLE:	Leadership Coaching
SOLICITATION NUMBER:	71412503

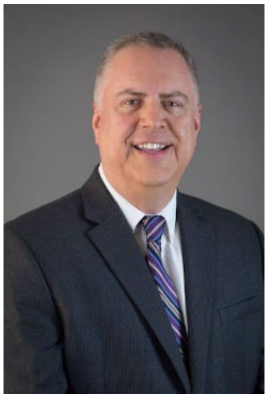
I. CLARIFICATIONS AND ADDITIONAL INFORMATION

The due date is being extended to **December 16, 2024 at 3:00 PM**.

Review of proposals will begin January 6, 2025.

Appendix A – Coach Bios

SCP has selected the following PCC coaches to put forward for this proposal. SCP continues to evaluate and recruit top talent with the desired experiences for our clients. An updated coach list will be furnished periodically or as applicable to each task order.



Mr. Gary Bettger, MPP, PMP, ICF PCC
Location: DC/Virginia area
Availability: In-person/Virtual
Assessments: MBTI, DiSC and DiSC 363, EQ-i/EQ 360, CCL Benchmarks 360, OPM 360, Lencioni Five Behaviors of a Cohesive Team

Gary has worked with Strategic Consulting Partners for nearly ten years in a variety of capacities. He is an internationally accomplished management consultant, trainer, facilitator, and coach who has worked across all sectors for 30+ years. He has served as an SME in project management, performance management, leadership, strategic planning, change management, and organization improvement for numerous projects including facilitating over 100 instances of customized training/other for almost every federal government agency including DoD, DOE NNSA, Nuclear Regulatory Commission, USDA Forest Service and NRCS, USAID, DOI, FAA, Treasury, VA, DHS, DOJ, HHS, HUD, and OPM. He also is a Professional Certified Coach through ICF and brings nearly 2,000 hours of coaching experience across all sectors.

Additionally, he has worked in the commercial sector for a wide range of companies including Microsoft, Marriott, T Rowe Price, Bank of America, Cargill, Specialty Steel Industry, Hawaiian Electric, Planet Fitness, various Pharma, and nonprofit organizations like Wolf Trap Foundation, Children's Hospital of Philadelphia, National Association of Community Health Centers, and Habitat for Humanity. He has worked in multiple locations (having traveled in all 50 US States and over 50 countries) and is a top-rated adjunct professor teaching graduate courses at George Mason University. Mr. Bettger brings his own graduate-level education from [redacted]. Additionally, he was selected as a prestigious American Society for Public Administration Center of Accountability & Performance Fellow and a Presidential Management Intern (serving at the U.S. Department of Commerce). Finally, he has received awards/recognition for his work at the Centers for Disease Control and Prevention, and at Booz Allen Hamilton, where he led a team of over 20 staff and was responsible for a multi-million-dollar consulting business.

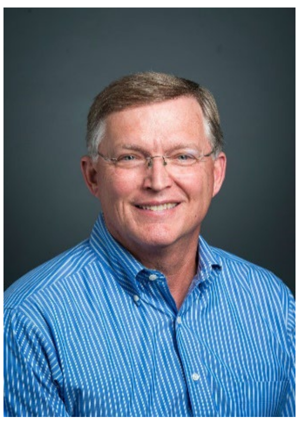
Nickey Knighton, ICF PCC
Location: Springfield, Virginia
Availability: In-person/Virtual
Assessments: DiSC, Clifton Strengths, OPM 360, The Leadership Circle Profile

Nickey is a native of Benevolence and Cuthbert in Randolph County, Georgia. Upon high school graduation, she attended college at Tuskegee University in Tuskegee Institute, Alabama. Ms. Knighton was in the Army ROTC program at Tuskegee and was commissioned as an officer in the Army immediately upon graduation from college in 1979. She served on active duty for twenty-nine-and-a-half years; her military assignments allowed her to serve across the United States and on four different continents in various leadership roles. Upon leaving the military, Nickey served on the Executive Leadership Team of the Prince George's County (Maryland) Public Schools System as the Chief Human Resources Officer (CHRO). She currently serves as a Senior Consultant, Leadership Coach, and

Strategic Planner to federal, private, nonprofit, and public organizations focusing on leadership development, change management, and organizational culture.

Nickey holds an [redacted] She continues to serve through her memberships with Delta Sigma Theta Sorority, Inc., the U.S. Army Black Aviation Association, and Leave No Veteran Behind. In addition, Nickey is the founder of S.H.A.P.E. (Self-esteem, Harmony, Awareness, Pride and Education), a nonprofit uplift project that serves rural communities in southwest Georgia. She also founded WINNERS!, a People Investment Company providing volunteer consulting services to underserved communities.

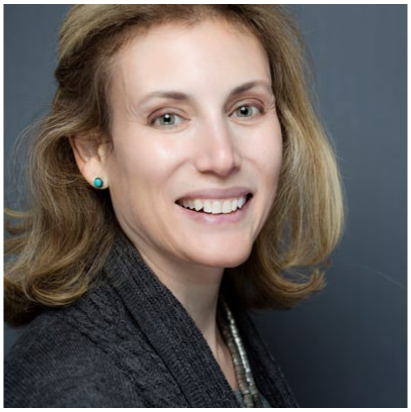
In addition to her numerous honors, military awards, and decorations, Nickey is the recipient of the General Benjamin O. Davis, Jr. Tuskegee Airmen Leadership Award; The Bessie Coleman Aviation Award; United States Army Black Aviation Association Award; African American HistoryMakers. She has been featured in numerous national and international publications, including being named as one of *Glamour Magazine's* Top 10 Working Women.



Richard (Rick) Christ, ICF PCC
Location: Northern Virginia
Availability: In-person/Virtual
Assessments: MBTI, DiSC, FIRO-B, TKI, SDI, EQ-i/EQ 360

Richard has worked with SCP for the past four years with a variety of clients including NRC, PA Hospice, Virginia Housing, USDA, IRS, FEMA and FHFA. His career interests have run along two tracks: Human Resources and Organizational Development, and Leadership Coaching. He learned through senior positions in his 30-year ExxonMobil career that significant organizational improvement and valuable individual development are often made through HR/OD and coaching. Richard's international HR leadership work focused on management development and succession planning, and many OD interventions including reorganizations, asset spin-offs, and office openings/closures. He has worked in all HR functional specialties. In the last 20 years of his ExxonMobil career, in addition to his leadership coaching (which focused on senior executives and leaders), he was the senior HR leader on a high-level team that identified, negotiated, and implemented over 30 M&A transactions throughout the world, with a total value over $20B. Richard interacted daily with C-suite executives to develop strategic objectives, implementation plans, and communication strategies. Since retiring early from ExxonMobil, he has continued his role as a strategic advisor and coach to senior leaders in the corporate sector, government agencies, USA Military, higher education, nonprofits, and start-up entrepreneurs. He has provided presentations and training to organizations including SHRM, ICF, ATD and several universities.

Richard earned a [redacted] ICF-approved coaching training program in 2013 and is certified at the PCC level by the ICF. He has been an Adjunct Faculty member and Career Advisor at George Mason University since 2016.



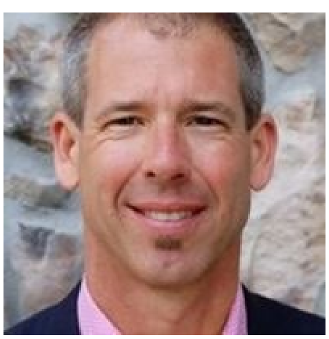
Jill Marshall, MS, PCC
Location: Denver, Colorado
Availability: Virtual
Assessments: MBTI, OPM 360

Jill currently serves as a senior consultant on projects for the federal government and private sector organizations, addressing human capital, manpower, and organizational analyses challenges, including capability, workload, and competency analyses. She has extensive knowledge and experience as a master coach and trainer specialized in organizational development, change management, and workforce management. She is an award-winning human capital strategist with a proven track record in developing and leading large-scale, comprehensive leader and staff development programs for diverse clients.

Jill is currently supporting SCP on strategic workforce planning and talent development projects for the U.S. Navy. She also supports the Department of State's Foreign Service Institute by providing transition and career coaching to senior-level U.S. diplomats and civil servants through the Transition Center's Job Search Program. In addition, she provides experiential leadership, team building, and onboarding training to FSI's A-100 program.

She is a certified professional coach and organization development, learning, and human capital strategist with over 20 years of experience in developing leaders and staff in the corporate, nonprofit, academic, and government/military sectors. Jill has worked with diverse clients and international groups, including Booz Allen Hamilton, the Financial Industry Regulatory Authority (FINRA), and the School of Advanced International Studies (SAIS) at The Johns Hopkins University, the Association for Talent Development (ATD), and the U.S. Army. She currently serves as the President of the Board for the ATD.

Jill holds an MS in Management from the [redacted] She is an International Coach Federation (ICF) Associate Certified Coach (ACC), a CTI (Coaches Training Institute) Certified Professional Co-Active Coach (CPCC), a Reach Certified Personal Branding Strategist, and Reach Certified Social Branding Strategist. She is certified in the 360Reach personal branding assessment tool, is certified at the Gold, Silver, and Bronze levels of the Kirkpatrick Four Levels of Training Evaluation and is a certified Langevin Training Manager.



Todd Dallanegra, MAICS, ICF PCC
Location: Annapolis, Maryland
Availability: In-person/Virtual
Assessments: DiSC, OPM 360, Five Behaviors of a Cohesive Team, Leadership Circle Profile

Todd is past President of the International Coaching Federation Metro DC Charter Chapter, ICF's largest city chapter in the world with 1,100-plus members. Todd has supported several SCP clients over the past six years, including but not limited to the IRS Treasury Executive Institute, NRC, U.S. Space Force, Hospice, and Virginia Housing. For more than 20 years, he has used his unique combination of projects in the private, public, and nonprofit sectors globally to empower leaders to move forward and authentically live out their calling.

He effectively leverages his strong cross-cultural and interpersonal skills that he honed while working as a trainer, facilitator, and coach with leaders in Europe for thirteen years. Todd has native-like proficiency in French and has custom-designed and delivered training and coached clients in French and English across Europe, the United States, and Africa on issues including organizational change and strategy, values clarification, executive presence, partnership development, work-life balance, interactive trainings/meetings, and communication skills. He currently delivers executive coaching at NASA Goddard Space Flight Center and Wallops Island Flight Facility and participates as a coach in the Department of Homeland Security Customs and Border Protection Leadership Institute Executive Coaching Program. Todd has a [redacted].

Brutrinia D Cain, JD, BSN, RN, ACC
Location: Gaithersburg, MD
Availability: In-person (DC metro area)/Virtual/Hybrid

Brutrinia "Trinia" Cain is an experienced Leadership and Executive Coach dedicated to empowering leaders to unlock their potential, enhance emotional intelligence, and develop authentic, clear, and purposeful strategies. With over 20 years of experience as a leader, nurse, attorney, and health policy expert, Trinia offers unique insights into coaching and leadership development. She is passionate about helping emerging, mid-level, and senior leaders foster collaboration, drive results, and tackle complex challenges. Her hands-on coaching style enables clients to achieve their goals and create sustainable success.

Trinia's commitment to professional development is evident in her certifications in personal, professional, and executive coaching from the Coaching and Positive Psychology Institute, as well as credentials from the International Coaching Federation. She has served as an internal coach with the Department of Health and Human Services (HHS) Federal Coach Network and as faculty for the HHS Federal Internal Coach Program. In addition to co-creating and co-leading the U.S. Public Health Service Commissioned Corps' (USPHS) Chief Nurse Officer Leadership Institute Coaching (CNOLI) Program, she is a skilled facilitator and has held certifications in Arbinger's Developing and Implementing an Outward Mindset and Covey's *7 Habits of Highly Effective People* programs.

As a proud veteran of the U.S. Army Nurse Corps and the USPHS, Trinia is deeply committed to these communities. This dedication fuels her research into how professional coaching can mitigate healthcare worker burnout, and she has delivered graduate-level lectures and provided custom workshops on this critical topic.

John F. (Jack) Kendall, ICF ACC
Location: Washington, D.C./ Virginia
Availability: In-person/Virtual
Assessments: DiSC, Clifton Strengths, OPM 360

Jack is an ACC ICF-certified coach providing executive, leadership and career coaching. He has experience as a DoD Civilian and as an Army Aviation Officer and specializes in Talent Management, Workforce Development, Leader Development, Program Management, and Human Resources. He led the U.S. Army's Acquisition Workforce Leader Development and Talent Management program where he established key talent management strategic initiatives and implemented coaching as an integral development pillar for mid- to senior-level leaders. He synchronized talent management efforts with employee engagement initiatives throughout the Army and the federal government and created solutions to attain short-term and long-term objectives in support of the Assistant Secretary of the Army for Acquisition while routinely coaching government civilian leaders as a member of the Federal Coaching Network. As part of the Army Program Manager for the Defense Acquisition Workforce Development Fund, he developed and executed three annual programs totaling in excess of $350 million. As the Army Acquisition Workforce Strategic Planner and Initiative Chief, he analyzed and developed strategic initiatives to develop the 40,000-member Army Acquisition Workforce.

Jack believes in leading by example to develop a cohesive team, fostering a working atmosphere which allows for autonomy, creativity, and professional growth. Jack holds a [redacted].

Annette M Cremo, Ph.D., CPC
Location: Atlanta, Georgia
Availability: Virtual/In-person
Assessments: MBTI, DiSC, EQ-i/EQ 360, CCL Benchmarks 360, Review OPM 360, Leadership Circle Profile, Gallup Strengths Finders, Five Behaviors of a Cohesive Team, Leadership Practices Inventory, Strengths Deployment Inventory (SDI), FIRO B, TKI.

Annette M Cremo, Ph.D., is an experienced coach who has worked in the private and public sector for over 25 years. Her mission is to help people be more successful and attain their goals. Through building professional relationships with clients, Annette produces extraordinary results in their lives, careers, and organizations, helping them to bridge the gap between where they are now and where they want to be. She supports her clients in fine tuning leadership skills at all levels, from first line to senior executives. By creating clarity, her coaching moves the client into action and accelerates progress by providing greater focus and awareness of all the possibilities that exist to achieve productive careers. She has coached seasoned executives, managers, and high-potential leaders in a variety of organizations on executive presence, leadership capacity, work transitions, and life/work balance. As a seasoned facilitator, she has designed and facilitated leadership and management training workshops which address a variety of topics that lead to growth of individual and professional potential. Her clients have said she is intuitive, approachable, and insightful.
Annette studied at [redacted]

Annette published Filling the Leadership Pipeline through the Association for Talent Development, and has her second publication, A Guide to Succession Planning, scheduled to be released in February 2024.

Debbie DiGregorio-Hixson, Ph.D., M.A., CCMP, ICF-ACC
Location: Poolesville, Maryland
Availability: In-person/virtual/hybrid
Assessment Certifications: Hogan, MBTI, DiSC, Social and Emotional Intelligence Profile (SEIP), EQ-i2, Leadership Circle Profile, Clifton Strengths, TKI

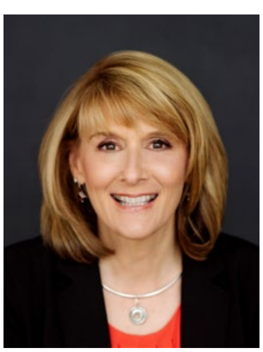
Debbie has over 30 years of experience working with organizations to develop greater leadership competence and team effectiveness and building organizational cultures capable of thriving in fast-paced, complex, and competitive environments. She has deep expertise in designing effective Change Management methodologies and tactics for large-scale implementations. She is a Certified Change Management Professional, a certified Prosci Change Management Practitioner as well as an ICF certified executive coach.

Debbie has spent many years coaching leaders with a focus on helping them develop their own leadership abilities and fostering growth within their teams. Her approach centers on cultivating self-awareness, emotional intelligence and effective communication, enabling leaders to inspire and guide their teams towards achieving their collective goals. By empowering leaders to unlock their full potential, Debbie supports the creation of high performing, collaborative and resilient teams.

In her 20 years at Kaiser Permanente, Debbie previously served as Strategy and Program Lead. During her tenure there she successfully designed and delivered multiple full-scale, enterprise-wide Change Management, Leadership Development and Organization Design programs. More recently, Debbie has consulted with several consulting groups, and with a Federal agency (DOD), to design and implement Change Management for a large-scale digital transformation initiative. She has deep expertise in designing effective Change Management methodologies and tactics for large-scale implementations. Debbie currently works at MedStar Health where she supports leaders and teams who are transforming the way they work, acts as an internal leader coach and designs and delivers targeted leader development programs to build greater leader capability across the enterprise.

Debbie has a [redacted] Debbie speaks on a wide variety of topics including leading change in fast paced environments, enhancing employee engagement, communicating effectively, reducing conflict, influencing others, and working effectively across generations.

Debbie lives with her precocious cockapoo Bella and enjoys spending time hiking and volunteering as an interpretive guide for the National Park Service.



Janet Ladd, PCC, SPHR
Location: Baltimore, MD
Availability: Virtual/In-person
Assessments: Complete suite of Everything-DiSC® instruments, Gallup Strengths Finder, OPM 360, Five Behaviors™ of a Cohesive Team, Conflict Dynamics Profile (CDP), Auerbauch Wellness Inventory Assessment, Values in Action (VIA) Strengths Survey

Janet is passionate about empowering individuals and organizations to achieve meaningful growth, resilience, and sustainable success. As a professional coach and organizational development consultant, she helps clients unlock their potential, strengthen leadership, and navigate complex career and life transitions. Her dynamic approach helps clients develop practical strategies, gain valuable insights, and build confidence to address their challenges effectively.

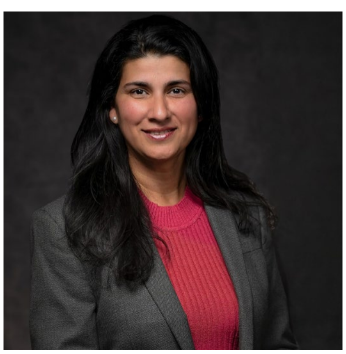
With an [redacted] Janet combines academic expertise with over 20 years of leadership experience in higher education, human capital technology, and human resources. She holds advanced certifications, including the Professional Certified Coach (PCC) designation from the International Coaching Federation and the Senior Professional in Human Resources (SPHR) accreditation. A certified Developmental Dimensions International (DDI) Facilitator, Janet is also completing the National Board for Health and Wellness Coaching (NBHWC) certification program, a credential that integrates evidence-based wellness strategies with effective coaching techniques.

Janet is certified in a variety of assessment tools which enable her to help clients deepen self-awareness, leverage feedback, and develop tailored strategies for growth. Her collaborative approach focuses on addressing each client's unique challenges and opportunities while fostering clarity and motivation.

Through coaching, training, and consulting, Janet partners with individuals and teams to enhance leadership capabilities, strengthen team dynamics, and support professional development. Her clients include Fortune 500 companies, mission-driven organizations, and public sector entities.

Janet's career includes leadership roles in higher education, technology consulting, and human resources. As a founding member of the Maryland chapter of the International Coaching Federation, she chaired the education committee and led initiatives to broaden access to professional coaching. Currently, she serves on the board of Target Community and Educational Services, supporting programs that empower individuals with disabilities to lead independent lives. She is also an Affiliate Member of the Institute of Coaching (IOC) at McLean Hospital, a Harvard Medical School affiliate.

Janet's mission is to integrate coaching, wellness, and leadership development to help individuals and organizations align their strengths with their aspirations. By combining the science of human potential with practical strategies for growth and connection, she fosters healthier workplaces and more fulfilling careers.



Neelam Samant, PCC, CPA
Location: Lansdale, PA
Availability: Virtual
Assessment Certifications: Leadership Circle Profile 360

Neelam's coaching experience includes coaching clients in management and leadership positions in several small and medium-sized companies, government agencies, universities, and non-profit organizations. Neelam also serves as a mentor coach for George Washington University's Center for Excellence in Public Leadership (GW CEPL) and their e-Co Leadership Coaching Certification program. She serves the community through her pro bono work as a coach for social entrepreneurs (supporting UN's SDGs), various BIPOC leaders, retired/retired veterans, small business owners, and university students.

Neelam also offers over 20+ years of corporate leadership experience from several Fortune 100 and 500 organizations. 11 years of that experience comes from her pivotal Finance and IT Senior Leader role and partnership with the C-Suite executives. During that tenure, Neelam managed and informally coached many internal teams, individual contributors, and senior leaders within the companies in the past. Neelam uses this extensive experience to allow separate offerings of training and consulting services to help various types of leaders depending on their learning and development preferences.

Neelam is committed to supporting authentic, courageous, and inclusive leadership transformations in her clients through a whole human development approach. She is a deep listener and meets every client where they are in their journey. She creates a safe, judgment-free, and curious coaching space where the clients can openly explore their challenges, ways of being, and beliefs/blocks and feel engaged in creating possibilities to move forward and transform, one session at a time. Neelam helps her clients develop their way of being to become authentic and effective leaders who take performance and outcomes to the next level. She nurtures and honors the trusting relationships that she builds with her clients. She brings mindfulness practices, meditations, somatic experiences, and imagery exercises to allow her clients to select what resonates with them to help through the coaching experience.

Neelam is a resident of Lansdale, PA, a wife and mother of two, and a devoted owner of a rescue border collie. Her passion for empowering others shines through her volunteer work as an inspirational speaker, career guide, and mentor. She actively supports aspiring entrepreneurs, offering motivation, advice, and strategic partnerships to help them navigate their journeys. A deep sense of purpose drives Neelam's life; she strives to create a better world by guiding individuals toward fulfilling their highest potential. Dedicated to personal growth, she invests significant time in self-learning and development, focusing on mindfulness and spiritual practices. Neelam is also a creative artist who creates custom and professional-level baked goods that she donates to local underprivileged children through her non-profit organization, Baking Smiles.

Timothy Little, ICF ACC
Location: Washington, D.C.
Availability: In-person/Virtual
Assessments: SDI, OPM 360, Five Behaviors of a Cohesive Team, Leadership Circle Profile, Global Competency Inventory

Timothy has more than sixteen years of experience facilitating change with individuals, teams, and organizations. He has worked with leaders at all levels in government and non-profit, domestically, and overseas. He specializes in leadership development and conflict resolution, which is strongly informed by years of experience in the field of diversity, equity, and inclusion. His interest began one summer when he was a teenager training in peer mediation and conflict resolution. Since then, he has practiced focused skills (coaching, mediating, facilitating) and honed methods in practical application to empower people in building stronger relationships, teams, and organizations. Timothy is now sought out for his expertise in conflict resolution, facilitation, and leadership development. He trains and coaches leaders at all levels. He is often hired to support organizations navigating high risk challenges and complex workplace conflicts.

During his federal government career, he served as a Senior Leadership Development Specialist for the U.S. Department of State where he designed and delivered leadership training to over 100,000 employees globally. He also coached senior and mid-level leaders as a part of the leadership development program. He also served as a Department of Navy Certified Mentor Mediator, Leadership Development Coach and Trainer, where he designed and developed cohort-based leadership program for professionals at all Levels. He created curricula, facilitated training, administered group-coaching sessions, mentored new leadership coaches, and contributed to educational evaluations. He also served as Program Manager (ADR, Awards, Recognition), NAVAIR ADR Technical Advisor where he pioneered the first Conflict Coaching program within the Department of the Navy. He holds a [redacted].

Monu Harnal, Masters in Education, Instructional Design and Development, Executive Leadership Coach
Location : Washington, DC
Availability: In-person/Virtual/Hybrid
Assessment Certifications: FIRO-B, EQ-i 2.0/EQ 360

Monu believes in transforming growth through trust, communication, and connection. With experience in training and development, Monu brings exceptional client relations, communication skills, and a deep commitment to trust and confidentiality. As a certified leadership coach, she values fostering safe, supportive environments where clients feel empowered to explore challenges and achieve meaningful growth. Her coaching practice is grounded in active listening, empathy, and personalized strategies that align with individual and organizational goals.

Monu's personal philosophy is "think globally and act locally." As the Lead Instructional Designer and Trainer for Geneva Software, Inc., she has partnered with a multitude of professionals globally, developing training solutions that address linguistic, cultural, and management challenges. Her global train-the-trainer initiative not only delivered impactful programs but also strengthened trust and collaboration among diverse teams. Through Virginia Health Options, she has further honed her ability to simplify complex systems and communicate with clarity, enabling clients to navigate critical healthcare processes here in the States.

Monu holds a [redacted] Her professional philosophy is rooted in integrity, confidentiality, and respect, ensuring every client feels heard, valued, and supported. With over 20 years of experience as a yoga instructor and advocate for mindfulness, Monu brings a holistic approach to coaching, helping clients align their personal and professional aspirations.

Whether facilitating workshops, designing learning experiences, or guiding individuals through coaching, her goal is to empower growth, build lasting relationships, and create spaces where people can thrive.

Linda Roszak Burton, ICF ACC, BBC
Location: Ellicott City, Maryland
Availability: In-person/virtual
Assessments: DiSC, Five Behaviors of a Cohesive Team, Conflict Dynamic Profile, Mental Fitness

As an executive coach, Linda's coaching methodology combines the latest research and evidence-based practices in positive psychology, gratitude, neuroscience, and positive organizational behaviors (POB). As a gratitude subject matter expert, Linda conducts research on the impact gratitude has on culture, employee engagement, and well-being. She is currently conducting research with CQ University in Queensland, Australia and Angelia Ruskin University in Cambridge, England. *See publication: Gratitude interventions to improve well-being and resilience of graduate nurses transitioning to practice: A scoping review* Recently, Linda presented at the Spring Wellness program for NOAA Fisheries on the Surgeon Generals Health and Wellness Category - Mattering at Work.

Linda is a credentialed executive coach through the International Coaching Federation, a certified Brain-Based Coach through the NeuroLeadership Institute, a Mental Fitness Coach through Positive Intelligence, and a licensed Positive Psychology Instructor. In addition, Linda is a certified Positive

Psychology-Based Health and Well-Being Coach through the College of Executive Coaching. She is preparing for board certification by the National Board of Medical Examiners (NBME) and the National Board of Health and Well-Being Coaches. She holds a bachelor's degree in health education from Virginia Tech, has completed coursework pursuing a [redacted], and is a member of the Institute of Coaching at McLean Hospital/Harvard Medical School Affiliate.

Since 2017, Linda has written a feature series on gratitude for the Wharton Healthcare Quarterly. She is a frequent blogger and author of *Gratitude Heals®- A Journal for Inspiration and Guidance* (Available on Amazon.) In addition, her TEDx Talk on Gratitude: *The Power to Heal the World* was released in 2022. She serves healthcare clients, academic institutions, government agencies, and nonprofit charitable organizations.

Amy Herman, MSOD, PCC
Location : Phoenix, Arizona
Availability: In-person/Virtual/Hybrid
Assessment Certifications: Firo-B, EQ-i/EQ 360, Enneagram 2.0.

Amy Herman has over 19 years of experience as a leadership coach, facilitating senior level projects with Children's Action Alliance, Harvest Healthcare, Food and Drug Administration, U.S. Postal Service, Health and Human Services Office of Inspector General, Housing and Urban Development Office of Inspector General, National Institutes of Health, CareFirst Blue Cross Blue Shield FEPOC, and other federal agencies. Amy holds a [redacted] and professional certification in coaching (PCC-CTI), Appreciative Inquiry (Case Western Reserve/NTL), Change Management (Prosci), EQi/EQi 360, Mediation, Enneagram 2.0, and Firo-B. Amy's training and experience is enhanced by her naturally positive approach, energy, and desire to see clients succeed and thrive.

Megan Taylor Morrison, ICF, ICF PCC
Location: Austin, Texas
Availability: In-person/Virtual

Meg is a sought-after executive coach, facilitator, and speaker. For the last 10 years, she has helped leaders and teams enhance their emotional intelligence and communication skills, build confidence, and reach meaningful goals. Meg believes that effective coaching creates a ripple effect, transforming entire teams and organizations.

Before becoming a coach, Meg held leadership roles at a startup in New York City and a nonprofit in Washington, DC. She also founded a travel company that led retreats across six countries, equipping her with a deep understanding of the pressures leaders face in dynamic, high-stakes environments. Meg committed to coaching full-time after experiencing how her coach training improved her ability to lead, communicate, and achieve better results. Inspired by the positive changes in her own life, she wanted to help others achieve similar transformations.

Meg has completed extensive training, including programs with Co-Active Coaching and the Strozzi Institute for Somatics, and holds a master's degree in science journalism, grounding her approach in evidence-based methodologies. She also completed an 18-month private internship with a leading Silicon Valley coach, supporting founders at venture-backed companies.

Meg has worked with leaders from NASA, Daimler, and the U.S. Soccer Foundation, as well as Fortune 500 companies and government agencies like the U.S. Nuclear Regulatory Commission (coaching leaders up to the Senior Executive Service level). She is known for her ability to challenge clients while incorporating humor and compassion into her sessions.

Meg offers bespoke coaching services tailored to:

- **Teams**: Workshops, retreats, and offsites designed to improve communication, boost EQ, rebuild trust, and increase productivity.
- **Leaders**: Individualized executive coaching to help managers and executives confidently navigate leadership demands.

A seasoned speaker, Meg has presented at events such as the Forbes Thought Leader Summit and led sessions for organizations such as Business Network International and Chief. Her workshops cover numerous topics including navigating tough conversations, maximizing employee retention, inheriting teams, leveraging intuition, and increasing team motivation.

When she is not coaching, Meg enjoys swing dancing and swimming in icy rivers. She is a certified Wim Hof Method instructor and an award-winning artist.

Appendix B – Key Personnel

Monica Gould | Project Sponsor, Contract Manager

Experience Highlights

- Over twenty-six years of Executive level experience leading Strategic Consulting Partners as its principal owner. SCP was named the 2018 SBA Woman-Owned Business of the Year in Eastern Pennsylvania.
- Owner and operator of 180+ acre cash crop farm and historic rail trail in Mechanicsburg, Pennsylvania, which produces soy, wheat, and corn.
- Manager of large agricultural land production and projects for multiple 150+ acre farms in Mechanicsburg, Pennsylvania.
- Award-winning lead strategist and facilitator for 200+ Strategic Planning Projects for federal, nonprofit, and corporate clients impacting over 100,000 employees, representing over $1B in revenue.
- Manages a multi-million-dollar small business with 42 employees.
- Facilitated hundreds of training sessions impacting thousands of leaders and their teams.
- Sought-after National Keynote Speaker – topics include Leadership, Communication, Generational Diversity and Teambuilding
- Former Whirlpool Corporation executive, as Vice President of Marketing for the Inspired Chef division, leading and directing over 100 employees and contractors.
- Former MCI Telecommunications Corporation executive, leading 150 direct staff and impacting a team of 5,000 employees.

RFQ Qualifications	Candidate Experience
Project/Program Management	▪ Managed SCP for 26 years as the Chief Executive Officer. ▪ Directly managed over 40 federal projects for effective client delivery ▪ Led technical training projects for several Navy clients
Organizational Development	▪ Facilitates organizational assessments ▪ Conducts succession planning ▪ Facilitates focus groups and key stakeholder interviews for USDA NRCS PA ▪ Manages USDA Dairy Program FEVS Analysis and Leadership Support Project ▪ Conducts organizational assessments to include 5 Behaviors of a Cohesive Team ▪ Facilitates team coaching and team-building sessions with several federal agencies to include HUD, OPIC, DOT, Navy, DHA ▪ Facilitates Diversity and Inclusion Research and Training Initiative for all PA Law Enforcement Agencies
Leadership Coaching	▪ Certified ICF ACC Coach ▪ 30+ years coaching and mentoring leaders and aspiring leaders. ▪ Provides coaching services to executives in all industries and sectors. ▪ Coached over 500+ leaders in Comcast Corporation ▪ Conducts leaders' assessments, including DiSC, Insight 360, EQi360
Facilitation/Strategic Planning	▪ Leads strategic planning efforts for clients in all sectors for SCP ▪ Leads strategic planning efforts for DHS – Coast Guard TRACEN, Cape May ▪ Leads Strategic planning efforts for Deputy Assistant Secretary of the Navy for Expeditionary and Logistics Management. ▪ Has facilitated more than 200 nonprofit strategic planning initiatives
Leadership Development Training	▪ Provided leadership development training to Federal employees for 10+ years ▪ Developed and trained over 200 USDOT supervisors on Employee Engagement ▪ Facilitated professional development training programs for US Army AMCOM ▪ Facilitated training and teambuilding sessions for HUD, OPIC and DOT

Selected Relevant Experience

- **President and Founder, Strategic Consulting Partners (7/1994 to Present):** Manages all operations for this multi-million-dollar consulting practice. Serves as project sponsor and program manager for all client projects.

For select projects, serves as the project manager or leader for SCP's major federal programs which include multiple task orders and engagements running simultaneously. Leads strategy development programs for public sector clients and nonprofit organizations to guide them through their strategic planning process and oversees progress on all of SCP's active training and coaching projects. Specializes in facilitating large strategy sessions, town-hall meetings, and training programs, working with many different stakeholders and boards to help them to develop innovative ideas that are practical and implementable. Provides recommendations for strategic direction and developing task orders and customized approaches to organization development initiatives. Currently serves as Program Manager for a single award IDIQ $2.5 M contract and manages the entire NRC's organizational development and coaching services needs under an 8A Sole Source Award; this contract supports 15-20 active task orders which have been customized to the client teams ranging in size from $15-100K.

- **Whirlpool Corporation – VP of Marketing for Inspired Chef:** Supported the founding of Inspired Chef, a subsidiary of Kitchen Aide; hired and trained over 150 chefs nationwide to support the program; managed internal staff of 12 responsible for hiring, recruiting, and training chefs; brokered the sale of the division to a small business.
- **MCI Telecommunications Corporation – Senior Manager of Operations:** Managed operations for 12 customer service and telemarketing centers across the country; responsible for Human Resources, Training, Operational Effectiveness, and Technology; managed $1.1 B in revenue and $240M in capital funding annually; directly managed 150 staff members impacting 5,000 employees nationwide.
- **Duquesne University and Kaplan University – Adjunct Professor:** Taught leadership skills to a variety of adult learners over several years.

Other Experience

- **Board Chairwoman,** Former Chair, Big Brothers Big Sisters Capital Region
- **Board President,** Past President, Mechanicsburg Chamber of Commerce

Education

[redacted]

Certifications and Designations

- ICF Certified Coach, ACC
- DiSC – certified to deliver and coach on all assessments
- 5 Behaviors of a Cohesive Team
- Strengths Development Inventory 2.0
- CliftonStrengths
- Situational Leadership 2.0
- National Speakers Association – Professional Member
- IMC USA, Certified Management Consultant (CMC)
- Standards for Excellence Certification Maryland Nonprofits
- Licensed consultant and Standards for Excellence Trainer for Pennsylvania Nonprofits
- Certified Minority Woman-Owned Business in PA, MD, VA, and Federal

Awards

2020 "Power 100" awardee, *Central Penn Business Journal*; Strategic Consulting Partners, SBA Women Owned Business of the Year 2018 for the Eastern Region of Pennsylvania; DCA Entrepreneur of the Year 2018; Top 25 Women of Influence of the Year, *Central Penn Business Journal*, 2016; YWCA Woman of Excellence 2010; Pennsylvania's Best 50 Women in Business, 2009

Dr. Annette M. Cremo | Chief Learning Officer

Experience Highlights

Annette Cremo is a seasoned education, instructional design, training, and organizational development consultant offering 25+ years of experience designing tailored solutions that help companies enhance workplace learning and performance, build deep benches of talent, cultivate rising leaders, and increase retention. In that capacity, she acts as key strategist and business partner to stakeholders in aligning organizational development, client outcomes, training, evaluation, and performance improvement initiatives with the organization's vision and mission. Specifically, Dr. Cremo has more than 25 years of instructional experience in major businesses and industries, including USAID, Unisys, and U.S. Defense Department. She also has a long history of success in developing curricula and delivering instruction in traditional classroom and distance-learning environments, working with diverse organizations and clients.

Dr. Cremo is a renowned subject-matter expert in adult learning and training with extensive publication and presentation credits, consulting engagements, and media visibility, punctuated by many years of service to organizations through designing corporate universities, adjunct faculty appointments, service on Boards, committee chairmanships, and other positions of leadership and influence.

Qualifications	Candidate Experience
Facilitation/Curriculum Design	▪ Instructor at Penn State University in the Training and Development program ▪ Presented training programs throughout the United States for The Association of Talent Development ▪ 30 years of designing and delivering training for all levels in the organization ▪ Designed and presented programs for USAID focusing on Train-the-Trainer and Training in a Virtual Environment
Organizational Development	▪ Assessed instructional services for the military at Fort Benning and made recommendations for improvement. ▪ Oversaw cultural change for a nationwide organization after two acquisitions. ▪ Designs all of SCP's DEIA Training curriculum and facilitates training programs on Unconscious Bias for the NRC, VA State Police, CCM, and many more.
Leadership Development	▪ Designed an Emerging Leader Program including curriculum and mentoring. ▪ Designed and delivered Leadership Development Programs across all sectors of business and government. ▪ Provides customized leadership development program development for numerous large nationwide contracts for SCP's corporate and federal clients ▪ Facilitates leadership development training which she has designed and built for SCP's current clients including the Nuclear Regulatory Commission, USAID, and PA Office of State Inspector General
Executive Coaching	▪ Developed customized 360 assessments and provided debrief coaching as a follow-up senior-level executive coaching program

Selected Relevant Experience

Strategic Consulting Partners Chief Learning Officer (2014 to Present)

- **USAID,** Support Strategic Consulting Partners in Adult Learning and Curriculum design efforts for the USAID HRT project. Conducted an in-depth review of supervisory curricula including goals, objectives, content, and delivery methods, ensuring the content matched the module objectives. Delivering Virtual Training programs to all Professional Development Training Division supporting the USAID Regional Training Coordinators across the world on topics focused on Curriculum Design, Managing Virtual Training, Creating Training Storyboards, and Facilitating Successful Virtual Training Programs
- **Nuclear Regulatory Commission,** Ongoing. Conduct behavioral assessments with departments and leadership. Provide curriculum design and facilitate multiple OD engagements focused on DE&I and Team Building with DiSC.
- **Carlisle Construction Corporation,** Design and facilitate training programs on Civility and Respect in the Workplace to over 5,000 employees nationwide.

- **University of Pittsburgh Medical Center (UPMC),** Providing management and oversight of all workforce development training program curriculum design for large-scale projects.
- **American Management Association,** Design and teach public offerings and client onsite programs in Instructional Design (3-day program) and Train the Trainer (3-day program) throughout the United States to both private and public sector clients.
- **The Office of State Inspector General, Commonwealth of PA,** Designed and delivered a suite of Diversity, Equity and Inclusion courses and facilitated numerous sessions with leaders regarding the agency wide cultural transformation underway in the Commonwealth.
- **VA State Police,** Designed the DEIA training needs assessment, conducted Train-the-Trainer programs, and DEIA training for staff and leaders.
- **PA State Police,** Designed and conducted Unconscious Bias and Train-the-Trainer programs.

Other Experience

- **American Management Association,** NYC (2015 to present): Design curriculum and instruction for soft skills management and leadership development programs.
- **Touro University-California, Adjunct Professor (**2014 to present): Industrial and Organization Psychology (Doctoral level), Overview of I/O Psychology and Doctoral Dissertation Chair; Department of Human Resource Management (Master Level), Organizational Assessment and Design, Performance Assessment, Organizational Stress, and Strategic Management; and Psychology (Master Level), Diversity and Inclusion
- **Lehigh Carbon Community College** (2013 to present): Design, develop and implement curriculum for external clients.
- **Pennsylvania State University, Middletown, PA** (1990 to 2013): Adjunct Instructor, College of Education; Instructional Design and Training Consultant, Department of Continuing Education, Area Representative, Office of Adult and Continuing Education.
- **University of Scranton, Pittsburgh, PA** (2006 to 2010): Adjunct Graduate Faculty, Department of Human Resource Development.

Education and Certifications

[redacted]

- Myers-Briggs Type Indicator (MBTI)
- Certified Professional Coach - Coach Training Alliance (ICF recognized trainer)
- DiSC and Five Behaviors of an Effective Team (Wiley Publishing)
- EBW (Emotional Intelligence in Business)
- MHS – Advanced Emotional Intelligence Instruments EQi-2.0 360
- 20/20® Insight (design and analysis of 360 Evaluations)
- Center for Creative Leadership (CCL) 360° Evaluation
- Certified Professional Coach - CTA-certified through the International Coaching Federation (ICF)

Books: Creating a Vibrant Leadership Pipeline (ATD, August 2017); ASTD Infoline Designing Effective Supervisory Programs; ASTD Infoline Creating a Safe Organization – Dealing with Harassment in the Organization; **Articles:** Filling the Leadership Pipeline (ATD, August 2016); Diversity in the Workplace – A Business Imperative; Supervisory Skills; Sexual Harassment Issues and Answers; The Trainer's Guide in the Awareness and Prevention of Sexual Harassment in the Workplace; Designing and Implementing Supervisory Programs; Human Resource Development Trends for the 21st Century

Appendix C – Course Catalog

SCP's 2024-2025 catalog has been attached to this proposal. Visit our website at www.yourstrategicconsultant.com for future updates.

Helping Organizations, Teams and Individuals Reach Peak Performance

STRATEGIC CONSULTING PARTNERS

JAMA ENTERPRISES INC

2024-2025 SERVICES CATALOG

STRATEGIC CONSULTING PARTNERS

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STRATEGIC CONSULTING PARTNERS

STRATEGIC CONSULTING PARTNERS

Introduction

Strategic Consulting Partners (SCP) understands that corporate learning and development can be mutually beneficial to both employees and organizations. Employees feel valued and respected because the organization is investing in them, developing them for success in their current role, and preparing them for future opportunities. Organizations benefit because learning and development programs help reduce attrition, improve morale, and increase efficiency and sales.

As master trainers and curriculum designers, we understand that training materials should be customized and engaging for the adult learner. We ensure that we design dynamic, challenging, and inspiring content. We partner with each client to design and develop a wide variety of training programs to suit their organizations' specific needs.

SCP's Chief Learning Officer, Annette Cremo, Ph.D., incorporates her experiential and highly interactive approach into all programs she designs for clients. Every SCP trainer has years of experience in creating and maintaining an open, non-threatening learning community in which participants are encouraged to not only use their own experiences and to experiment during training and development programs, but also to take risks in order to maximize their joint learning.

Specifically, our methods include:

- Personal interaction through small-group discussions is designed to foster openness and shared learning.
- Brief lectures from the facilitator, typically provided as transitions from one major concept or learning to the next.
- Participation in a variety of activities, including numerous hands-on exercises and problem-solving during video vignettes selected specifically for each client.
- Targeted tie-in of learnings to the participants' own workplace. To facilitate this, we use a sequence labeled "**What?, So What?, and Now What?**" – so that after each activity, our facilitators engage the group in discussing "what they learned," "what the implications are," and, most importantly, "now what do we do with this when we return to work?"

If our training catalog does not include the content you're looking for, we will be happy to collaborate with you and your internal experts to customize any of our offerings to meet your organization's specific needs; we are also adept at designing entirely new courses to meet your unique needs. Our experienced instructional designers can partner with you and your experts to modify courses to virtual training, online, or blended learning.

Thank you for your interest. We look forward to helping you and your teams achieve peak performance!

Monica A Gould

Monica A. Gould, Founder and President

STRATEGIC CONSULTING PARTNERS

Why We Believe in Building Customized Training Programs

Building a customized training program is crucial for organizations seeking to address specific needs, enhance employee performance, and align learning initiatives with strategic objectives. SCP's customization allows organizations to tailor content and delivery methods to their unique context, ensuring that the training is relevant and directly applicable to the challenges and goals faced by employees. Generic training programs may not capture the nuances of an organization's culture, industry, or specific skill requirements. By developing a customized training program, organizations can create a more targeted and impactful learning experience.

These programs also contribute to increased employee engagement and motivation. When employees recognize that the training is designed specifically for them and addresses their roles and responsibilities, they are more likely to feel a sense of value and relevance. **This personalization fosters a positive learning environment**, enhancing participants' motivation to actively engage with the content. Moreover, tailored training programs can address varying skill levels within the organization, accommodating both new hires and experienced employees, allowing each group to progress at an appropriate pace.

One significant advantage of SCP's customized training programs is **the ability to address immediate and specific challenges faced by the organization**. Whether it's a need for upskilling in emerging technologies or addressing gaps in compliance knowledge, a customized program can be developed to directly target these areas. This agility ensures that the training content remains current and aligned with the evolving needs of the organization, contributing to the continuous improvement of employee skills and competencies.

Our programs also **promote a culture of continuous learning** within the organization. By tailoring content to match the organization's goals and strategic initiatives, employees become more aware of the connection between their individual development and the overall success of the company. This alignment fosters a sense of shared purpose and encourages employees to view learning as an ongoing process, supporting both individual career growth and organizational success.

In addition to enhancing employee performance, **our customized training programs can be more cost-effective**. Customized programs can be designed to address specific competencies without unnecessary content, reducing the time and resources required for training. This targeted approach ensures that employees receive the right knowledge and skills, maximizing the return on investment for the organization. Building your customized training program is an investment in the development, engagement, and success of your workforce, contributing to the long-term growth and competitiveness of the organization.

STRATEGIC CONSULTING PARTNERS

Essential and Interpersonal Skills

The Art of Influencing Others

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Being able to influence or win others over to our way of thinking demands respect and gives us the ability to achieve the outcomes we seek. Influencing others goes beyond positions of power; it requires skills like empathy and active listening. It is rooted in effective communication skills and self-awareness.

Topics Covered:

- The science of influence
- The role of empathy in dealing with others
- Active listening techniques
- Appropriate responses

Assertiveness Skills

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Some managers and colleagues seem to push too hard whereas others do not push hard enough. This course will teach participants the right balance of assertiveness, how to avoid language and behaviors that are not assertive (passive, aggressive, and passive-aggressive), and body language that may be perceived differently. Participants will learn how to handle conflict confidently, have their opinions respected, and take criticism constructively.

Topics Covered:

- Assertiveness skills
- The language of assertiveness
- Visual assertiveness strategies
- The importance of choosing your words carefully

Balancing Priorities

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: Start with the end in mind: *Where do participants need to go and what will get them there?* The session reviews participants' goals and priorities that enable them to develop actionable plans to help them succeed. Participants will also develop execution strategies and be held accountable for implementing them.

Topics Covered:

- Time management
- Prioritization techniques
- Plan execution strategies

Communication: Mystery Solved

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This interactive course is imperative for everyone and especially teams in the workplace. It will help participants recognize common myths and communication-related facts. Participants will practice effective listening skills and problem-solving techniques. They will leave with a toolkit of assertive-speaking techniques to use on the job.

Topics Covered:

- Communication myths
- Tips to improve listening skills
- Communication problems

Critical Thinking Skills

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This course will allow participants to practice their critical thinking skills. They will first review the critical thinking process, critical thinking traits, and common mistakes, then be offered case studies to apply and improve their critical thinking skills.

Topics Covered:

- The critical thinking process
- Skills associated with critical thinking
- Mistakes made in critical thinking

STRATEGIC CONSULTING PARTNERS

Business Etiquette

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: This course will empower participants to use basic courtesy and manners, practice common business etiquette to build and support their relationships, interact respectfully with coworkers and subordinates, and support relationships by effectively communicating with others.

Topics Covered:

- Respectful practices
- Business expectations
- Relationship building

Challenging Negative Attitudes

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: This course reviews how to control the impact of negative situations and pessimistic people by practicing positivity and optimism. Participants will learn coping tools for dealing with change, negativity, and pessimism. They will also practice a four-step process to eliminate negative organizational norms.

Topics Covered:

- Fixed vs. growth mindset
- The power of optimism
- The four-step strategy to address negativity

Customer Service Certificate Program

Course duration: Three days
Course format: Classroom ILT, Virtual ILT

Overview: The SCP Customer Service Certificate Program provides participants with a toolkit to begin following effective customer service practices. They will learn how to provide excellent customer service that meets or exceeds customer expectations. The program emphasizes developing an understanding of themselves and others, exhibiting emotional intelligence, coping with challenging customers, and becoming resilient. The program examines interpersonal communication and how to interact with all communication styles. The certificate is designed to provide an understanding of high-quality customer service, working in a team environment, and communicating effectively in business.

Topics Covered:

- Emotional intelligence in customer service
- Techniques for dealing with challenging customers
- Personality styles
- Elements of stellar service
- Approaches to building resilience

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Customer Service Over the Phone

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: Preview the aspects of becoming a "service star" – developing rapport, accepting responsibility and ownership, and handling angry customers. Learn how to build rapport with customers, identify components of excellent customer service, and use active listening to diffuse emotional situations.

Topics Covered:

- Three points of customer service
- Tips for dealing with irate customers
- De-escalation techniques

Developing Positive Relationships at Work

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: This course will show participants how to develop supportive and constructive relationships with colleagues. As a result, employees will create a more respectful workplace, be able to work through disagreements, find more team camaraderie, and have more job satisfaction.

Topics Covered:

- Respectful practices
- Communication essentials
- Listening skills that enhance relationships

Developing Trust

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: Trust is essential for any organization to succeed in today's increasingly competitive global environment. Organizations with high levels of trust are more credible, productive, flexible, and innovative and better able to adapt to changing circumstances and effectively handle crises. Organizations with high levels of trust are also better able to recruit and retain the best people because they provide an environment that helps employees to do their best work.

Not only is trust essential for an organization, but it is also essential for individuals, especially those in leadership or managerial positions, because employees will respect and more readily accept the ideas of those they trust. In this program, participants will learn how trust improves relationships at all levels and how to exemplify the characteristics and behaviors of a trustworthy person. Participants will examine how to embody trust traits and ultimately reduce the stress that often results from low levels of trust, which will increase their ability to work effectively with others within the organization.

Topics Covered in SCP's "Developing Trust" Course:

- The importance of trust
- Organizational trust
- Individual and team trust
- Societal trust
- Trust as a means to healthy conflict

Effective Listening Skills

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: This course will help participants improve their listening skills by helping them discover hidden messages, address distracting tendencies, and listen in emotional situations or groups. As a result, participants will receive messages clearly, build rapport with colleagues, avoid mistakes that often result from miscommunication, and create a more positive work environment.

Topics Covered:

- Barriers to listening
- Techniques for active listening
- Skills necessary to "read between the lines"
- Nonverbal communication

Effective Negotiation Skills

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: This course is designed to help participants overcome anxieties and wield confidence, control, and power during negotiations. In this course, participants will learn how to recognize underlying interests, identify their real needs, listen thoroughly to help build relationships, develop their "BATNA," and maintain their composure in any negotiation situation.

Topics Covered:

- Desired outcomes, goals, and alternative options
- Management of ego and trust issues to ensure successful negotiations
- Difference between positions and interests
- Analysis and selection of negotiating strategies to favor specific situations
- Individual negotiation styles
- Emotional situations that maintain positive negotiating climates
- Common negotiation mistakes

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Emotional Intelligence

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: SCP's interactive program will give participants the knowledge and tools to understand emotional intelligence and develop their own emotional intelligence. Participants will learn how to identify their emotions, identify triggers, and discover how participants perceive and respond to emotionally charged situations. In addition, participants will discover responses that yield healthy conflict resolution, identify others' emotions, and create a productive relationship.

Topics Covered:

- Identification of different emotions
- Behaviors associated with emotions
- Emotional triggers
- Emotional responses
- Techniques for understanding others
- Relationship building

Essential (Crucial) Conversations

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This course is designed to engage individuals in effective dialogue to help build and maintain relationships while achieving lasting results. So important to the negotiation process, a crucial conversation is a discussion between two or more people where stakes are high, opinions vary, and emotions run strong. As most know, these conversations, when handled poorly or ignored, cause individuals, departments, and organizations to get less-than-desirable results.

Participants will achieve spirited, yet respectful, dialogue helping to incorporate better ideas and high-quality decisions. This training introduces a series of principles that build alignment, agreement, and interpersonal communication.

Topics Covered:

- Recognize personal style under stress and overcome their natural tendencies to fight, flee, or agree
- Maintain a supportive attitude during a crucial conversation
- Identify when emotional safety is at risk in a crucial conversation
- Develop strategies to make it safe to talk about almost anything
- Steps to staying in dialogue when angry, hurt, or scared
- Tips to speak persuasively rather than abrasively
- Explain how to listen when others turn angry or silent
- Turn crucial conversation into action and results

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The Golden Rule

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: If participants surveyed a random list of companies and asked them what their core values were, chances are that most would identify "respect" as a top value. But what does "respect" mean and why is it important? During this course, participants will examine the behaviors that contribute to a respectful workplace at the individual and organizational level; they will also learn to recognize the importance of working in an organizational culture that fosters respect.

Topics Covered:

- Definitions of respect
- Respectful practices and behaviors
- The importance of valuing others
- Healthy workplace cultures
- Strategies to maintain a respectful workplace

Habits That Propel Success

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Organizations of all types are changing more rapidly than ever before. Employees need to adopt great habits to ensure their own success and the success of the organization. This course focuses on how to identify, review, and practice effective habits to ensure success. Participants will learn how to take initiative, balance key priorities, improve interpersonal communication, leverage creative collaboration, and apply principles for achieving a balanced life.

Topics Covered:

- The changing nature of the workplace
- Habits that ensure success
- Collaboration
- Insights for understanding others
- Prioritization – a "balancing act"
- Work-life balance

How to Handle Change and Upheaval

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Denial, anger or resistance, bargaining, acceptance, and support – the stages of change. This session identifies events occurring in the workplace that involve a shifting or changing workplace environment and examines individuals' reactions to change. It also provides strategies for dealing with change and upheaval-related stress.

Topics Covered:
- Stages of change
- Reactions to change
- Resistance to change
- Coping strategies
- The "why" behind change

How to Make Yourself Indispensable

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Today's workplace requires that an individual readily takes on a range of tasks to accommodate frequent organizational changes while remaining productive. This course gives participants the knowledge and skills to make them invaluable, by providing tips and approaches to building resilience and adaptability in various situations. It will review communication strategies, effective problem solving, and creating a growth mindset.

Topics Covered in SCP's "How to Make Yourself Indispensable" Course
- Organizational basics
- Problem solving 101
- Effective communication
- Political savvy
- Resilience

How to Manage Your Emotions

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This highly interactive course helps participants recognize their own emotions and the everyday messages that emotions send us at work and in our personal lives. Additionally, participants will learn how to recognize their triggers, reframe their thinking to avoid unproductive emotions, and develop a long-term strategy to channel emotions productively.

Topics Covered:
- The identification and naming of emotions
- Personal triggers
- Unproductive emotions
- Productive use of emotions
- Development and growth of healthy relationships

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Turn Ideas Into Action

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Innovation lowers the costs and/or increases the benefits of a task. So, innovation can be applied to virtually any aspect of working in an organization–products or services, internal processes, single tasks, etc. This session examines the myths and misconceptions about innovation, practices the four-step process for innovation within teams, and identifies the long-held beliefs within organizations.

Topics Covered:
- Four-step process of innovation
- Dysfunctional beliefs
- What is and is not innovation
- Innovation assessment
- Benefits of innovation

Increasing Your Emotional Intelligence

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Emotional intelligence is the ability to comprehend emotions and manage them effectively. Emotional intelligence helps individuals say the right thing and accurately judge how the other person is reacting. This program increases employees' level of emotional intelligence and examines negative consequences of unmanaged emotions. It then reviews strategies to increase empathy and social skills by practicing greater self-awareness, self-control, and self-motivation.

Topics Covered:
- Emotional Intelligence assessment
- Strategies to increase emotional intelligence
- "People reading"
- Negative consequences of unmanaged emotions
- Social intelligence
- Empathetic responses

Managing Up

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: A supervisor's role is not one of command and control, but of collaboration. If managers are unable to meet deadlines, accomplish goals, and fulfill expectations, those unmet obligations inevitably become a burden to others, and the communication between team members and managers can suffer greatly. This session is designed to make managers' lives easier. Participants will discover that being in tune with their needs and supporting their daily obligations, in turn, also benefits those they lead. Managers' work lives will run more smoothly, they will encounter less conflict, and they will make a positive impression on their supervisors, ultimately forging a successful relationship.

Topics Covered:
- "Boss detective" characteristics
- Communication
- Growth mindset vs. fixed mindset
- Emotional Intelligence
- Management of difficult conversations
- What bosses want

Meeting Without Mayhem

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Many people have sat, and sat, and sat in a meeting and not accomplished anything. One of an organization's greatest time wasters (and money wasters) is the meeting that runs ineffectively – or perhaps the meeting that should never have taken place. This session will give participants practical tools and strategies to help run any type of meeting – from small informal meetings to large formal meetings.

Topics Covered
- Meeting analysis
- Optimal time
- Agendas to get results

Mental Models

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Each one of us has a perception of reality about how the world works – a mental model that provides understanding, guides thinking, and directs decision making. Built from everyday experiences, outside influences, and rewards such as money and success, mental models can be both beneficial and detrimental to success. This program will show participants how to examine their mental models to separate fact from opinion, clarify assumptions, and reveal hidden beliefs. Using interactive exercises and activities, this learning experience illustrates the need to tune into one's surroundings, look for opportunities, and approach work with an open mind.

Topics Covered:
- Thinking and decision making
- How we think
- Techniques to clarify assumptions

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Mentoring

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Potential mentors and mentees fill out an information sheet about what they hope to offer or obtain from a mentoring relationship. Mentees will also have input into the process by requesting

potential mentors. Participants will describe the role of the mentor as it relates to leading others, examine ways in which the organization can benefit from mentors, and define and demonstrate each of the four skills of Mentoring Communication: active listening, giving information, asking powerful questions, and providing feedback.

Topics Covered in SCP's "Mentoring" Course:

- The role of the mentor
- The process of mentoring
- The mentoring engagement
- Expectations
- Questioning and listening skills
- Relationship closure

Problem Solving and Decision Making

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Solving problems and making decisions are essential skills. Whether participants are plotting a long-term strategy for their departments or for the organization or trying to improve their own performance, the ability to draw informed, deeply thought-out conclusions is invaluable. Effective problem-solving skills enable participants to cut through the fog of faulty beliefs and misperceptions to make *reflective*, rather than *reflexive*, decisions.

Topics Covered:

- The six-step problem-solving process
- Tools applied in problem solving
- Examination of risks and rewards
- Root-cause analysis
- Application of problem solving

The Multi-Generational Workforce

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This is the first time in history that there are four different generations in the workplace. Each generation is shaped by its unique experiences growing up and its members' diverse ideas about what they want in their work lives and personal lives. These differences affect how they interact with each other and judge each other's behavior and performance. This course examines the different generations, their needs, and strategies to understand them.

Topics Covered:

- The generations in the workforce
- What makes us who we are
- What motivates the generations
- Communication and the generations
- Opportunities for collaboration

Navigating Difficult Conversations

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Difficult conversations happen every day. These conversations are challenging but are often both positive and negative. They can enhance relationships or destroy relationships depending upon how they are given and perceived. When handled poorly, they are likely to result in serious problems that interfere with productivity and leave everyone involved feeling frustrated and dissatisfied. This course gives participants the skills to handle these challenging conversations, develop trust, and encourage commitment.

Topics Covered:

- What makes conversations difficult
- What stops participants from having conversations
- Strategies to begin the conversation
- Communication basics

Negotiation Skills: Getting to "Win-Win"

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: This course is designed to help participants overcome anxieties and wield confidence, control, and power in negotiation. In this course, participants will learn how to recognize underlying interests; how to identify their real needs; how to listen while building relationships; and how to maintain their composure during negotiations.

Topics Covered:

- Definition of BATNA
- The process of negotiation
- Relationship building
- Collaboration
- Identification and avoidance of triggers

Organizational Trust

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: In this session, participants will review the benefits of working in a high-trust environment and learn risk-aversion techniques when deciding whether to trust another person. Participants will also have the opportunity to assess their organization's trust levels and link the results into the five pillars of trust.

Topics Covered in SCP's "Organizational Trust" Course:

- The four pillars of trust
- Relationship essentials
- Trust busters
- Benefits of trust
- Approaches to mending the trust relationship

Presentation Skills

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: "Platform techniques" involve presenters' nonverbal communication with the audience – how the presenters employ their bodies to support the intended message. The way presenters use – or misuse – such techniques as eye contact, poise, dress, appearance, gestures, and facial expressions has a significant effect on the listeners and frequently spells the difference between *audience apathy* and *enthusiastic acceptance* of the ideas presented. We will be going over each of the skills listed above.

Topics Covered:

- Vocal skills
- Nonverbals
- Annoying habits
- Presentation design
- Audience analysis
- "Storyboarding" the presentation
- Great openings

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Preventing Workplace Harassment

Course duration: Three days
Course format: Classroom ILT, Virtual ILT

Overview: During the last decade, sexual harassment has become a subject of increasing concern for large and small employers alike, as well as for employees at all levels of the organization. Employers have come to understand that this very sensitive area can be difficult to deal with, disruptive to the workplace, and disagreeable to all concerned. The stakes are high and getting higher. In an increasingly litigious society and in an era of ever-increasing employee rights and employer responsibility, sexual harassment allegations are particularly hazardous. This session offers participants strategies to deal with and prevent workplace harassment.

Topics Covered:
- Title VII
- Policies
- Unwelcome behaviors
- Strategies to deal with harassment
- Prevention of workplace harassment

Productive Work Habits

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Technology has revolutionized the workplace. We are always "on" – emails, social media, and internet searches. In addition to this, we have coworkers who sometimes get us off track! What is not done today MUST be done tomorrow. This course addresses those bad habits we've gained over the years and provides strategies to focus on throughout the day. As a result, participants will work more productively, prioritize tasks more effectively, and improve relationships with coworkers.

Topics Covered:
- Technology challenges
- Time management
- Strategies to deal with interruptions
- Prioritization
- Tips and tools
- Techniques to increase productivity

Project Management

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: When an employee learns how to manage projects effectively and efficiently, not only does the organization benefit, but the employee also reaps benefits. Today's organizations rely on employees who can carry a project through from inception to completion – on time and on budget – using resources efficiently and achieving quality outcomes. Thus, being able to manage projects successfully makes employees more valuable to your organization and improves their career prospects by providing them with critical skills.

Topics Covered:

- The four stages of a project
- Factors that ensure project success
- Definition of a project's objectives
- Steps to move projects forward
- Strategies to keep projects on track

Real-World Project Management

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: This two-day course covers both the techniques and the "art" of project management. Individuals – from the novice performance manager to individuals who have years of experience – will benefit from this course. Participants will learn to define project characteristics and determine time, cost, and performance requirements; identify the stakeholders who will be involved; set plan execution and accountability parameters; monitor milestones; and evaluate project progress and deliverables. The course also covers evaluating the project's success.

Topics Covered:

- The art of project management
- "Project" definitions
- Time, costs, and performance requirements
- Stakeholders and success
- Execution and accountability
- Milestone monitoring
- The importance of evaluating success

Resilience

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: One thing we know is that change and uncertainty are here to stay, so we need to learn how to cope and develop strategies for bouncing back from adversity. Strategies for bouncing back that are covered include methods to build self-esteem as a foundation of resilience, approaches to embracing and becoming more flexible in order to overcome obstacles, and ways to manage stress to maintain resilience.

Topics Covered:

- Skills required to bounce back from setbacks

- The role of self-esteem
- Strategies to become resilient
- Roadmap to achieving wins
- Management of stress and stressors

Resolving Conflict at Work

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This course explores three key elements of a strategy for making conflict management a core competency in an organization: developing conflict literacy, measuring conflict styles, and building conflict management skills. These elements can be applied in a flexible manner, so that they can be adapted to the needs of your organization.

Topics Covered in SCP's "Resolving Conflict at Work" Course:

- Skills required to embrace and overcome conflict
- Various conflict styles
- Conflict management skills
- Conflict management process
- Collaboration

Stress Management

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Everyone is familiar with stress. We experience it in varying forms and degrees every day. In small doses, stress can actually be beneficial to us. It is only when the stress becomes too great, affecting our physical or mental functioning, that it becomes a problem. This program defines stress and then explains the fundamental mechanisms behind it. Next, it shows participants the effects that stress has on their health and on their performance. Finally, it introduces participants to the different approaches to managing stress.

Topics Covered:

- Definition of stress
- Causes and impacts of stress
- Strategies for dealing with stress

Successful Collaboration

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Successful collaboration is a process that requires attitudes and skills that can be learned and reinforced. Deploying these skills will make employees' jobs easier and help them become more successful professionally. This course focuses on building and implementing an effective collaboration process so that working with others on projects will be constructive and likely to yield positive results.

Topics Covered:

- Communication essentials
- Effective listening skills
- The collaboration process
- Skills required to build relationships

Solid Business Writing

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: In today's world, writing effectively is critical; poor writing can be looked at as unprofessional and lead to a lack of credibility and a loss of customers. This course will help participants utilize outlines to create documents, follow acceptable email protocols, and edit and proofread their work.

Topics Covered:

- Guidelines for writing with clarity
- Requirements to effectively convey messages
- The importance of proofreading and editing
- Email etiquette

Taking Control of Conflict – Viewing Conflict as Healthy

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This interactive course examines conflict in the organization and how to identify preferred strategies for handling it. By identifying the source of conflict and implementing effective resolution strategies, participants will learn how to successfully handle conflict— and even how to prevent unnecessary conflict from occurring in the first place.

Topics Covered:

- Sources of conflict
- Various views of conflict
- Conflict predisposition

- Conflict styles
- Conflict-resolution processes

Time Management

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: In today's busy workplace, with demands on employees to do more with less, having a structured approach to completing multiple tasks or projects is essential. This interactive course will discuss various approaches to time management, help participants understand the relationship between their time management style and personality preferences, and identify the priorities and boundaries of their jobs.

Topics Covered

- "Time robbers"
- Reasons to plan your day/week/month
- Approaches to time management
- Time management styles
- Prioritization skills

What Customers Really Want

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Customers have many options today, and most of the goods and services people want and need can be found in many places. Good customer service is what differentiates one vendor from another. This course will explore the concepts and benefits of extraordinary customer service, identify ways of building customer rapport, and improve participants' listening skills.

Topics Covered:

- Ways to ensure you stand out
- The "Service Profit Chain"
- Extraordinary service standards
- Approaches to developing rapport
- Listening skills
- Techniques for dealing with difficult customers

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Why We Struggle with Tough Decisions

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: In today's workplace, some people suffer from "analysis paralysis" because they overanalyze their choices; they want a spreadsheet packed with data before proceeding with any decision. Others swear by their intuition and have no data to back up how they arrived at a particular decision. This course will address the role that emotions play in making decisions, describe how to make a decision effectively, and develop strategies to overcome concerns about making and implementing tough decisions.

Topics Covered

- Analysis paralysis
- Decision making
- Emotions and their role
- Decision-making skills

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Leadership, Management, and Supervisory

ADKAR: Leading Change

Course duration: One day
Course format: Classroom ILT, Virtual ILT

The ADKAR model describes five required building blocks for change to be realized successfully on an individual level. Organizational Change Leaders can utilize the ADKAR method in assessing and managing the Human Side of Change. This approach helps with the human – or emotional – aspect of change management. Participants will learn the five steps in the ADKAR process, behaviors that indicate resistance to change, and apply the ADKAR model to a current innovation.

Topics Covered:

- The ADKAR model reviewed
- Challenges of change
- Approaches to identifying and combatting resistance

Adapting Your Leadership Style

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Strong leadership is the essential foundation of any organization. This course will empower participants to implement the qualities of an effective leader and communicate more effectively with their teams by adapting their behavioral style to meet the needs of employees. Consequently, participants will be better able to facilitate meetings efficiently, engage in productive conversations, and build rapport among colleagues.

Topics Covered:

- Leadership Behavioral Assessment (DiSC Management)
- Qualities of an effective leader
- Leadership conversations
- Flexibility and accountability

Behavioral Interviewing

Course duration: One day
Course format: Classroom ILT, Virtual

Overview: In this course, participants will learn how to identify general competencies necessary for the position and the organizational culture, translate them into performance criteria, and then develop behavioral-based questions according to their competencies.

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Topics Covered:
- Employee competencies
- Performance criteria
- Behavior-based questions

Coaching Conversations
Course duration: Two days
Course format: Classroom ILT, Virtual

Overview: This course reviews some basic yet essential coaching situations and expands upon them to allow participants to practice applying the skills in different situations. Each participant will have a chance to practice or evaluate a portion of a coaching session. As a result, participants will be able to target specific areas for improvement, motivate and inspire individuals, communicate more effectively as coaches, and increase job satisfaction for themselves and those they coach.

Topics Covered:
- The coaching process
- Coaching skills
- Powerful questions
- Ground rules

Coaching for Development
Course duration: One day (Pre-requisite: Coaching Conversations)
Course format: Classroom ILT, Virtual

Overview: Helping employees build their careers demonstrates respect for them. It shows that their work is appreciated and that coaches are concerned about their coachee's professional growth. This course will help participants understand the coaching process and how to apply each step, identify common challenges to successful coaching, and learn to discern the differences between coaching and other development strategies.

Topics Covered:
- Review of the process
- Developmental opportunities
- IDP
- Accountability

Defining Great Teams
Course duration: One day
Course format: Classroom ILT, Virtual

Overview: Building a great team takes more than just getting people together. Employees need to recognize the differences between teams and groups; understand the need for balance between task behaviors and team behaviors; take steps toward clarifying their teams' position; establish a mission; and develop guidelines. This course walks participants through the essentials of building a great and productive team.

Topics Covered:
- Personality styles
- Team behaviors
- Team missions
- Growth opportunities

Delegating for Growth

Course duration: One day
Course format: Classroom ILT, Virtual

Overview: In this course, participants will discover how to decide what to delegate, match people with projects, clearly articulate desired outcomes, identify boundaries, and anticipate problems. As a result, they will improve the quality of their work by allowing the employees who have direct knowledge to complete tasks, create personal accountability, motivate employees, have more flexibility in assignments, and increase productivity.

Topics Covered:
- When and what to delegate
- The process of delegation
- Definition of boundaries
- Accountability plans

Developing Direct Reports

Course duration: One day
Course format: Classroom ILT, Virtual

Overview: Managers miss opportunities to help their direct reports develop new skills and competencies if (1) they aren't thinking about it, or (2) they imagine development opportunities as really big things which take enormous effort. Encouraging employees to present their ideas for development and training ideas are essential to their growth. This course will demonstrate for participants how to develop supportive and constructive relationships with employees. As a result, employees will create a more productive workplace and be able to take charge of their futures.

Topics Covered in SCP's "Developing Direct Reports" Course:
- Required competencies
- Growth relationships
- Areas of support and encouragement
- Conversation starters

Driving Accountability

Course duration: One day
Course format: Classroom ILT, Virtual

Overview: Accountability is the responsibility of employees to accomplish the defined and assigned tasks required by their jobs within a reasonable time in order to assist the organization in fulfilling its goals. This course discusses the importance of accountability in organizational culture. It reviews the behaviors associated with accountability and the role of employees in being accountable for their performance standards in the department.

Topics Covered:

- Whose responsibility is it?
- Benefits of accountability
- The behaviors of accountability
- Accountability and performance

Leading with Emotional Intelligence

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: SCP's interactive program will give participants the knowledge and tools to understand emotional intelligence and develop their emotional intelligence as leaders. Participants will learn how to identify their emotions, identify triggers, and discover how they perceive and respond to emotionally charged situations. Also discussed will be the role of emotional intelligence in leaders. In addition, participants will discover their personas and the responses that lead to healthy conflict resolution. Understanding others' emotions and creating productive relationships will also be discussed.

Topics Covered:

- Identification of emotions
- Behaviors associated with emotions
- Emotional triggers
- Emotional responses
- The importance of understanding others
- Relationship-forming skills
- Techniques for connecting with employees and peers

Employee Engagement

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Discover if employees are actively engaged with their work or simply putting in their time. We will look at whether team-building activities and human resources practices influence positive business outcomes or if there's room to grow into an engaged culture. It is imperative to the health of an organization that employees be engaged in their jobs. What do employees who are not highly engaged do? They might look for work elsewhere – or perhaps, even worse, stay and do the bare minimum to remain employed. This interactive course will help participants understand the importance of recognizing every employee as a unique individual and identifying their strengths and how to leverage them in the workplace.

Topics Covered:
- Attributes of employee engagement
- Signs of disengagement
- Outcomes of employee engagement
- Assessments of participants' current environment
- Characteristics of a healthy work environment

Financial Intelligence

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: By improving their financial knowledge, participants will discover ways to become more efficient and more productive. If they are leaders, participants will discover how to justify requests and translate performance into financial terms. By doing this, they will have justifiable data to prove their departments' contribution – giving them the verbiage that resonates with their bosses, upper-level management, and other organizational stakeholders.

Topics Covered:
- The importance of calculating performance
- Identification of departmental contributions
- Break-even analysis
- Liquidity ratios
- Profitability ratios
- Leverage ratios
- Efficiency ratios

Fundamentals of Strategic Planning

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Whether participants have a more philosophical mindset or are more task-oriented, strategic planning involves moving the organization forward toward a shared vision through agreed-upon goals and objectives. This session gives participants the tools, knowledge, and skills to begin the strategic planning process.

Topics Covered:
- Strategic plan descriptions

- A roadmap for going from strategic to tactical
- The role that "visioning" plays in the planning process
- Reasons for setting goals and objectives
- Project planning
- Accountability

The Golden Rule – Leadership Lessons to Live By

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: If employees surveyed a random list of companies and asked them what their core values are, chances are that most would identify "respect" as a top value. But what does "respect" mean and why is it important? During this course, participants will examine the behaviors that contribute to a respectful workplace at the individual and organizational level, recognize the importance of building a workplace culture that fosters respect, and implement strategies to maintain a respectful work environment when faced with stress, uncertainty, and change.

Topics Covered:
- Definitions of respect
- Respectful practices and behaviors
- The importance of valuing others
- Healthy workplace cultures
- Strategies to maintain a respectful workplace

Interviewing – Fishing for Blue-Ribbon Employees

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: When looking to attract the best candidate for your organization, it is critical to conduct a comprehensive interview. This requires that the interviewer is prepared and can make the candidate feel relaxed and open to sharing information beyond what's noted in their résumé and cover letter. This interactive program allows participants to practice interview techniques and listening skills and understand which questions are permitted and which elicit the best responses.

Topics Covered in SCP's "Interviewing – Fishing for Blue-Ribbon Employees:
- The importance of well-written job descriptions and know when to revise them
- Applicant matching – job requirements, roles and responsibilities
- Recruiting best practices
- Interview preparation
- Selection criteria, questioning techniques, and background research

Leading Others Through Change

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Successfully leading others through change requires acquiring knowledge of the change process, planning for success, and creating innovative ideas. This course begins with developing a clear understanding of what happens to people when they experience a change, whether personally or professionally. It involves exploring the tools and techniques to effectively lead change efforts in individual departments and the organization as a whole. Ultimately, these skills will build employees' and managers' confidence and help ensure success.

Topics Covered:

- Change theories
- People and change
- Resistance
- Tools and techniques
- Creativity – the what ifs

Management 101 – Learning the Art of Management

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Management 101 is designed for new managers. The goal is to help participants better understand their roles as managers, and how they can perform their duties to their highest potential. We will discuss the characteristics and skills of a manager, organizational behaviors, advice for new managers, and tips on managing in a virtual environment. This program is designed to make managers' lives easier. Their work lives will run more smoothly, they'll encounter less conflict, and they'll make a positive impression on their supervisors – ultimately resulting in stronger and more successful relationships.

Topics Covered:

- The role of the manager
- Managerial skills
- Characteristics of managers
- Navigation of the organization
- Virtual management

Managing Offsite Employees

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: The workforce is changing rapidly. Unexpected events have caused us to change. This session helps improve participants' ability to manage remote employees. It will discuss strategies to increase their ability to recruit, hire, and retain the right employees for a job. Participants will have the opportunity to practice skills that will ensure that their teams are cohesive and productive. Participants will also learn how to avoid costly, time-consuming problems and help their teams meet their goals.

Topics Covered:

- Approaches to dealing with changing requirements
- What works and what does not work
- Tips for recruiting and hiring
- Retention strategies for remote employees
- Problem identification skills

Managing Teams

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This course focuses on managing teams – whether onsite or remote. As team managers, it is imperative to delegate tasks to team members and balance team members' strengths and weaknesses, responsibilities, and strategies to develop organization-related team goals. Using these skills will allow managers to set clear objectives, communicate more effectively, and encounter fewer instances of discord.

Topics Covered:

- Definition of "teams"
- Skills of effective teams
- Strategies for managing teams
- Delegation of tasks and responsibilities
- Identification of teams' strengths and opportunities for development
- Communication essentials
- Team responsibilities

Mentoring From the Leader's Perspective

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Potential mentors and mentees fill out an information sheet about what they hope to offer or obtain from a mentoring relationship. Mentees will also have input into the process by requesting potential mentors. Participants will describe the role of the mentor as it relates to leading others, examine ways in which the organization can benefit from mentors, and define and demonstrate each of the four skills of Mentoring Communication: being an active listener, conveying information effectively, asking powerful questions, and giving feedback.

Topics Covered:

- Selection of the mentee
- The role of the mentor
- The process of mentoring
- The mentoring engagement
- Determination of what mentors offer
- Expectations
- Questions
- Guide to successfully closing the relationship

Motivating Employees to Be Their Best

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Keeping employees engaged and motivated to do their best can be challenging. It requires continuous communication and an understanding of every employee's strengths and weaknesses. This course is designed to teach participants how to tailor their leadership and communication styles to better suit the needs of their employees. As a result, participants will be able to create a shared vision for their organization, build group identity, create a culture of ownership, and establish a more collaborative, inspiring work environment.

Topics Covered:

- Communication styles
- Review of what employees need
- Reasons to develop a shared vision
- Motivation theories
- Collaboration

The Multi-Generational Workforce

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This is the first time in history that there are four different generations in the workplace. Each generation is shaped by its members' unique experiences growing up and their diverse ideas about what they want in their work lives and personal lives. These differences affect how they interact with each other and judge each other's behavior and performance. This course examines the different generations, reviews their needs, and presents strategies to understand them.

Topics Covered:

- The generations in the workforce
- What makes us who we are
- What motivates the generations
- Communication preferences by generation
- Opportunities for collaboration
- Leadership and the generations
- The gifts the generations bring

Onboarding

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Onboarding addresses four specific areas and includes direct involvement from the manager of the new employee, particularly when it comes to addressing relationships and roles. Relationships and roles are the two areas that have the greatest impact on employees' immediate productivity and satisfaction in their new position. Learn proven strategies to onboard and eventually retain new talent.

Topics Covered:

- Four essential areas in onboarding
- Relationship and roles
- Success factors
- Retention strategies
- Successful relationships
- Best practices for organizing the process

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Performance Management

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Effective and timely feedback is a critical component of a successful performance management program and should be used in conjunction with setting performance goals. If effective feedback is given to employees on their progress toward their goals, employees' performance will improve. People need to know in a timely manner how they are doing, what is working, and what is not.

Topics Covered

- The importance of setting goals and monitoring behavior
- Documentation of performance
- The conversation
- Employee development
- Best practices for setting employees up for success

Positive Approaches to Managing Performance Problems

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Giving feedback that enables others to grow is essential in any organization. Identifying performance issues and addressing them immediately is essential to maintain motivation in the team and the organization. This session gives leaders the opportunity to understand and practice a feedback model that will give them confidence in delivering their performance-related messages.

Topics Covered:

- Feedback essentials
- Identification of performance issues
- Impact of non-performers
- Accountability
- Motivation

Presentation Skills (Executive Presentations)

Course duration: Three days
Course format: Classroom ILT, Virtual ILT

Overview: "Platform techniques" involve presenters' nonverbal communication with the audience – how they employ their bodies to convey the intended message. The manner in which presenters use or misuse eye contact, poise, dress, appearance, gestures, and facial expressions has a significant effect on listeners and frequently spells the difference between *audience apathy* and *enthusiastic acceptance* of the presenter's ideas. We will be going over each of the skills listed above.

Topics Covered in SCP's "Presentation Skills (Executive Presentations)" Course:

- Political savvy
- Executive presentation skills
- Vocal skills
- Nonverbals
- Annoying habits
- Presentation design and delivery
- Audience analysis
- "Story boarding" of the presentation
- Great openings

Project Management

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Learning to manage projects effectively not only benefits organizations, but it also benefits individuals. Today's organizations rely on employees who can carry a project from inception to completion – on time and on budget – making more efficient use of resources and achieving quality outcomes. Thus, being able to manage projects successfully makes employees more valuable to their organizations and improves their career prospects by providing them with critical project management skills.

Topics Covered:

- The four stages of a project
- Factors that ensure project success
- Initiation and definition of projects
- Steps to move projects forward
- Strategies to keep a project on track

Succession Planning

Course duration: Three days
Course format: Classroom ILT, Virtual ILT

Overview: Succession planning is critically important to an organization and establishes a vision of where the organization will be going in the future. Creating a pipeline and knowing who is next in line to fill senior positions is critical to staying competitive. This course will help participants identify high-potential employees, recognize current and future needs, and create employee development plans as a tool for leadership development.

Topics Covered:

- Talent identification best practices
- Approaches to conducting talent audits

- Identification of workplace trends and needs
- Creation of the IDP

Social Media at Work

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: Effectively using social media requires good judgment and thoughtfulness. It can have important benefits, such as creating long-term, loyal customers and partners and cultivating relationships with employees, vendors, and suppliers. This course examines the activities required to successfully manage social media in your workplace, as well as identifying how to create effective social media policies.

Topics Covered:
- Social media do's and don'ts
- Creation of social media policies
- Benefits and challenges of using social media

Super Manager

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: It's been said that workers don't leave a job, they leave a manager, which highlights the importance of managers and the influence they have on employees. This program will help participants become the managers that employees want to work for. Participants will learn how to develop self-awareness and display attentiveness to the employees they manage, identify when and how to appropriately exercise mental flexibility, and encourage employee satisfaction and motivation by creating a fun and inspirational working environment.

Topics Covered:
- Management assessment
- Growth mindset
- Engagement
- Motivation
- Empathy
- Development of strong teams

Supervisor Communication Skills

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Supervisors are in a unique position. They are the liaisons between management and the workforce. The supervisor must ensure that the workforce performs the work to meet the organization's goals. To do this, the supervisor has to be able to effectively communicate with the workforce. This course will help participants identify the characteristics of assertive behavior and include them in their interactions, confront problem behaviors successfully, and create equitable compromises with employees and peers.

Topics Covered in SCP's "Supervisor Communication Skills" Course:

- Behavioral assessment
- Self-awareness of your behaviors
- Communication essentials
- Assertiveness
- Approaches to confronting problems in the workplace
- Employee engagement

Systems Thinking

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: A problem-solving approach that will help participants find optimal solutions to complex challenges, improve innovation, and increase productivity is *systems thinking*. This proactive problem-solving approach examines the relationships between various organizational functions and how they impact each other. This course will explain what systems thinking is, will help participants identify the benefits of using systems thinking, and how to apply the tools of systems thinking to address a problem or situation.

Topics Covered:

- Innovative thinking
- Organizations as systems
- The tools of systems thinking
- Relationships within organizations

Talk Like a Leader

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: It is critical that managers effectively communicate with their staff. This course will help participants express their vision and reinforce their relationships by discovering communication phrases and learn how to deliver constructive criticism effectively.

Topics Covered:

- The importance of expressing your vision
- Communication styles
- Tips and tools that increase communication
- Approaches to delivering constructive feedback

Team Excellence

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Teams are an essential part of almost every organization. We depend on teams to use resources more effectively, solve problems more creatively, and provide greater productivity than individual employees working alone. This course will teach participants the communication characteristics of high-performing teams, how to assess individual strengths to ensure the best possible team performance, how to set goals successfully, and how to avoid common goal-setting mistakes.

Topics Covered:

- Definition of teams
- Team roles
- Team responsibilities
- Teams and change
- Identification of team members’ strengths
- Delegation

The Toughest Supervisory Challenge

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Being a supervisor has many challenges. This course will help participants use realism, restraint, and resolve when facing any tough challenge, and employ conflict resolution techniques effectively. We will also cover dealing with employees’ personal problems with sensitivity and fairness and taking control and responsibility in a crisis situation.

Topics Covered:

- Realism
- Resolve
- Restraint
- Tough challenges
- Empathy
- Sensitivity
- Crisis-control

Surviving and Thriving in VUCA (Volatility, Uncertainty, Complexity and Ambiguity)

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: In this interactive session, participants will define and consider the impact of operating in a VUCA (Volatility, Uncertainty, Complexity and Ambiguity) environment. Many aspects of a VUCA environment dominate our landscape today. A VUCA environment is one that is constantly changing and unpredictable. In a VUCA environment, everything is in flux, nothing is certain. The VUCA environment can be difficult to navigate, but there are strategies that leaders can use to effectively lead in this type of environment. This class will give participants the tips and tools that will help them effectively deal with the challenges of VUCA environments – so that they can not only survive, but also thrive.

Topics Covered:

- Definition of VUCA
- Challenges
- Adoption and mastery of a “survive and thrive” mindset
- Strategies and tools to deal with challenging environments

Women in Leadership

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This interactive course addresses the challenges that women face as they pursue leadership positions, assesses limitations that women place on themselves, and recognizes special issues that women leaders face when they interact with others.

Topics Covered:

- Challenges women face
- Assessments of our perceived limitations
- Communication skills
- Assertiveness skills
- Tips for forming essential relationships

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Executive Leadership – Courses Designed for Leaders

Communication Skills for Leaders

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This course is for experienced leaders who are interested in developing superior leadership communication skills to achieve even greater success at the highest levels of their organizations. Participants are already successful as leaders and communicators. But now they must exercise even greater influence, solve bigger problems, and drive unprecedented performance improvements. Superior leadership communication skills and the ability to adapt them to constantly changing circumstances are essential.

Topics Covered:

- The secrets of outstanding leadership communication
- Techniques for becoming a more powerful leader
- The art of influence
- Approaches to identifying and addressing participants' specific challenges
- Best practices for communicating confidently in any environment – from spontaneous "elevator pitches" to high stakes reports and proposals
- Design and delivery of powerful messages that engage employees
- Development of simple, strong, credible messages tailored to each audience to lead rapidly to action

Design Thinking

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: What if employees could create solutions that would impact their team or organization? Better yet, what if they could do so rapidly by being experimental, collaborative, and holistically innovative? That's design thinking; it's a success mindset. It's for anyone who wants to see infinite possibilities and turn problems into solutions. Using a proven process to drive innovation, participants will work in small teams to visualize outcomes and challenge assumptions. They will learn a proven, repeatable, creative, and collaborative problem-solving method that they can use to reframe problems and generate more rapid, empathetic, and innovative products and services.

Topics Covered:

- Design thinking to improve organizational performance
- Design thinking to create new competitive assets
- Conversion of ideas into value and opportunity for the Federal Government
- Creative thinking and critical analysis skills
- Progressive and practical solutions for real-world problems

- New ways to collaborate across all functions of the organization
- Ten-step, iterative and repeatable processes to drive rapid innovation

Emotionally Intelligent Executive

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: This soft skill is known as *emotional intelligence*, and it is an essential element for all types of organizations, especially those with high-stress environments. If employees are unable to control their emotions, they can preoccupy employees' thoughts and interfere with their ability to evaluate a situation objectively. On the contrary, knowing what triggers their emotional responses and understanding how to exercise self-control over them enables employees to confront difficult issues and manage change with clarity and composure.

This program is designed to provide participants with the knowledge and tools to develop their emotional intelligence. Participants will learn how to avoid self-sabotaging outcomes by altering how they perceive and respond to emotionally charged situations. In addition, participants will improve their ability to constructively resolve conflicts, create a productive work environment, build and mend relationships, and bounce back from setbacks and disappointments.

Topics Covered:

- Development of self-awareness
- Prevention of motional hijacking by using techniques for collecting thought processes
- Benefits of positive work relationships through empathy
- The importance of building assertiveness skills
- Use of emotions as a tool to improve the process of conflict resolution
- Best practices for responding quickly and positively to changing priorities and situations
- Approaches to staying composed and focused in stressful or high-pressure situations
- How to reframe thinking, change perspective, and bounce back from setbacks

Executive Leadership Primer

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: When employees are focused on their organization's future every day of every workweek, it's vital that they are well equipped to optimize performance – as well as their own careers – with executive leadership training. What does it mean to be an executive leader? It means being a visionary, a transformational leader, a strategist, a communicator, a coach, and a diplomat. Pride, commitment, and camaraderie – those are the words executive leaders use to describe their organizations and their teams. They are able to focus on the big picture and uphold high standards while wearing many hats.

Topics Covered in SCP's "Executive Leadership Primer" Course:

- Leadership challenges and core leadership beliefs
- Leadership requirements in organizations
- The "big picture" of organizational strategies to enhance organizational culture
- The role of prioritization in securing time for strategy implementation
- Approaches to developing talent
- Alignment of organizational culture with strategy, by shaping organizational culture as a strategic leadership practice
- The art and science of inspirational leadership, by creating an environment that thrives on sharing ideas and collaborating

Leading Collaborative Teams

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: When should leaders be motivators? When should they encourage collaboration? When do they take charge – and when should they be a coach? Can leaders empower team members to self-manage? Or do their teams fall apart when they're not there? Learn how to foster team cohesiveness and collaboration. Learn how to step up to be a leader, a coach, a persuasive communicator, and much more. Sharpen team-building skills and discover new ways to drive performance and productivity.

Topics Covered:

- Leadership styles in different situations
- The importance of vision in aligning team performance
- Integration of leadership and managerial roles, by applying insights gained from current leadership position
- Techniques for effective collaboration
- The leader's role as performance ignitor and a coach
- The four team-personality types
- The principles that make teams work

Leading Organizational Change

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Leaders will explore elements of change in the organization – what it is, why it happens, the effects on individuals in the organization. Leaders will also have the opportunity to review and practice strategies to deal with the personal elements of change in addition to facilitating change in an organization.

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Topics Covered in SCP's "Leading Organizational Change" Course:

- The change cycles/phases
- The changing nature of the organization
- The organization's responses to change
- Way(s) to personally deal with change
- Strategies to cope with change
- Understanding change versus transition
- Validate the need for change
- Plan the transition
- Implement and monitor the transition activities
- Assess the success of the change and transition

Leading Through Disruption

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Communication is important during times of crisis and disruption. Timeliness and consistency of message are vitally important; not having these conditions in place before a disruption occurs places organizations at significant risk. Developing these three conditions during a period of disruption is an incredibly heavy lift. Fortunately, committed leaders can create opportunities to develop an organization that lives its values; can develop greater trust between leaders and those led; and can dramatically improve their communications.

Topics Covered:

- Practices of agile and resilient organizations
- Tactics to prepare the organization for navigating turbulent times and disruptive change
- Growth and fixed mindsets
- Capacity for foresight – anticipating change
- Tools for exploring opportunities
- Skills to help lead and motivate others toward agile and resilient mindset and behavior
- Strategies for developing resilience in organizations

Strategic Thinking

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Being strategic is a vital and powerful tool for success in business today. Strategic thinking involves having a defined destination, determining where employees are now and understanding any bumps in the road (future threats or changes). It consists of finding the true source of a problem or situation and making the proper adjustments. Many times within organizations, people diagnose only the *symptoms* of a certain situation. The goal of strategic thinking is to isolate the variables and understand the *root of the problem*.

Excellent strategic thinkers have an external focus. They have the unique ability to determine what is happening in the external environment that impacts the organization and its products and services. Strategic thinking focuses on finding and developing unique opportunities to create value by enabling a creative dialogue among people who can influence an organization's direction. Good strategic thinking uncovers potential opportunities for creating value and challenges assumptions about an organization's value proposition (their total offerings), so that when the plan is created, it targets these opportunities. Strategic thinking is a way of understanding the fundamental drivers of an organization – challenging conventional thinking about them – in conversation or dialogue with others.

Topics Covered:

- The concept of strategic thinking
- The skills associated with strategic thinking
- Personal barriers to strategic thinking
- Strategic thinking practices

Surviving and Thriving in VUCA (Volatility, Uncertainty, Complexity and Ambiguity)

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: In this interactive session, participants will define and consider the impact of operating in a VUCA (Volatility, Uncertainty, Complexity and Ambiguity) environment. Many aspects of VUCA environments dominate our landscape today. A VUCA environment is one that is constantly changing and unpredictable. In a VUCA environment, everything is in flux, and nothing is certain. A VUCA environment can be difficult to navigate, but there are some strategies that leaders can use to effectively manage others in this type of environment. This course will give participants the tips and tools that will help them effectively deal with the challenges of VUCA environments – so that participants can not only survive but also thrive.

Topics Covered:

- Explanation of VUCA
- Challenges presented in a VUCA environment
- Approaches to "mastering your mindset"
- Strategies and tools to deal with challenging environments

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Leadership Development Program

The Leadership Development Program (LDP) has two primary goals. One is to accelerate the adoption of managers' leadership skills. The second goal is to serve as a powerful catalytic mechanism for growth and excellence in an organization's journey to achieve its mission.

The LDP is a major learning commitment by managers. The program is designed as an initial 30-hour program, consisting of 10 three-hour sessions of intensive learning and strategic guidance utilizing individual, team-based, and larger-group learning approaches. Peer coaching will be utilized throughout the program.

To ensure continuity of learning and direct implementation of the leadership action plan, the group will reconvene for one day, three to five months after the original program, for additional input and to present the status of their implementation plan to leaders of your organization.

Topics Covered:

- Leaders' expectations for current and future direction and focus
- Approaches to strengthening leadership skills
- Strategies/strategic vision for organizational growth
- Best practices for strengthening organizational effectiveness skills
- Rapid growth through refinement of leaders' decision-making ability
- Knowledge management and use of performance and developmental coaching
- Creation of and commitment to implementing a peer-coached and critiqued action plan which addresses the LDP themes Big Dog and Little Dog's Performance Juxtaposition (knowledgejump.com)

Suggested Topical Areas:

Change

- Strategic goals – the role of the leader in times of change
- Change theories
- Learning activity: addressing change

Coaching Excellence

- Definition of coaching
- Benefits of coaching
- Coaching skills
- Coaching mindset
- Coaching process

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Concepts of Leadership

- The direction for leadership
- The changing nature of effective leadership

Direction

- Implementation of your vision
- What it takes to be effective in the organization
- Development of a research question and setting a direction

Healthy Conflict Resolution

- Benefits of disagreement
- Innovation and creativity
- Definition of conflict

Leadership Styles

- Learning activity: Leadership Questioner instrument
- When to use a preferred style
- Flexibility in styles
- Leadership plan development

Leading for Optimal Performance

- Identification of performance problems
- Documentation
- Best practices for "having the discussion"
- Accountability

Leading, Personal Character, and Ethics

- Development and implementation of your vision
- Values and beliefs
- Ethical decision making

Motivation and Engagement

- What motivates employees? (A discussion of M. Buckingham's "First Break All the Rules")
- Strategies
- Application

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Take the Lead - Basic Skills Program for the New Supervisor

Course Length: 2-5 days
Format: Live and Virtual

This basic supervision course for new supervisors is designed to equip individuals with the fundamental skills and knowledge essential for effective leadership in a supervisory role. The program focuses on key areas such as communication, conflict resolution, and team building. Participants engage in interactive sessions and practical exercises to enhance their understanding of organizational structures, employee motivation, and performance management. To foster problem-solving skills, the course incorporates case studies and real-world scenarios to simulate common challenges faced by supervisors. Emphasis is placed on developing a leadership style that balances authority and approachability, promoting a positive work culture. By the end of the program, participants will have gained a solid foundation in the core competencies required for successful supervision, enabling them to lead and support their teams with confidence and effectiveness.

The modules can include:

- **The Changing Nature of the Workplace:** This course explores the evolving dynamics of the modern workplace, equipping supervisors and managers with insights to navigate and lead effectively in an environment characterized by technological advancements, remote work, and shifting organizational structures
- **Understanding Yourself and Others:** Focused on self-awareness and interpersonal dynamics, this course empowers leaders to enhance their emotional intelligence to facilitate better communication, conflict resolution, and collaboration by fostering a deeper understanding of both themselves and their team members.
- **Communication Skills:** Participants in this course develop essential communication skills, including active listening, clear articulation, and effective messaging to enable supervisors and managers to convey information and directives with clarity, fostering a positive and productive work environment.
- **Conflict Resolution:** This course equips leaders with tools to identify, manage, and resolve conflicts within the team, promoting a harmonious workplace by addressing differences constructively and enhancing overall collaboration.
- **Team Building and Collaboration:** Focused on fostering teamwork and collaboration, this course provides supervisors and managers with strategies to build cohesive and high-performing teams, leveraging individual strengths for collective success.
- **Performance Management and Accountability:** Participants learn techniques for setting expectations, providing constructive feedback, and holding team members accountable, ensuring that performance management processes contribute to organizational goals and employee development.

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- **Leadership Styles:** This course explores various leadership styles, helping supervisors and managers understand and adapt their approaches to different situations, teams, and organizational contexts for effective leadership.
- **Coaching:** Designed to develop coaching skills, this course enables leaders to guide and support the professional growth of their team members, fostering a culture of continuous learning and improvement.
- **Emotional Intelligence:** Focused on the role of emotional intelligence in leadership, this course helps supervisors and managers cultivate self-awareness and empathy, enhancing their ability to lead with emotional intelligence in diverse workplace scenarios.
- **Employee Development and Motivation:** This course addresses strategies for motivating and developing employees, exploring methods to enhance engagement, job satisfaction, and individual growth within the organizational framework.
- **Ethical Leadership:** Centered on ethical decision-making and responsible leadership, this course emphasizes the importance of integrity, transparency, and ethical conduct in supervisory and managerial roles to sustain a positive workplace culture.

This program can be delivered through a multifaceted approach, incorporating a combination of in-person and virtual elements to accommodate diverse learning preferences and logistical considerations. Our flexibility allows you to fit the program to meet the needs of your organization.

The program can begin with a kickoff, where participants have the opportunity to engage in team-building activities, networking opportunities, and introductory sessions. This initial phase establishes a strong connection among participants and creates a conducive learning environment.

Future modules can be delivered through a mix of live and virtual sessions. Virtual sessions include interactive modules, guest speaker presentations, and group discussions facilitated through video conferencing platforms. Additionally, a coaching component can be integrated, providing personalized guidance and support. The program ends by allowing participants to consolidate their learning, share experiences, and strategize on implementing leadership concepts within their respective roles. This blended approach maximizes flexibility, accessibility, and application.

Our hybrid delivery model not only accommodates diverse participant needs but also leverages the advantages of technology to create a dynamic and scalable leadership development program.

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Leading With Confidence

Course Length: Varies

Format: Live and Virtual

SCP's multi-module leadership course is an intensive and focused program designed to provide participants with a condensed yet comprehensive exploration of key leadership principles and skills. The beauty of this is that you design your targeted content.

Throughout the program, your leaders will engage in a dynamic blend of interactive workshops, case studies, and practical exercises aimed at developing critical leadership competencies such as effective communication, strategic decision-making, team building, and adaptability. The course incorporates real-world scenarios, allowing participants to apply learned concepts in a simulated environment. Emphasis is placed on self-awareness, fostering a growth mindset, and promoting ethical leadership. By the end of the program, participants gain valuable insights, tools, and strategies to enhance their leadership capabilities, empowering them to lead with confidence and drive positive change within their organizations.

This flexible program allows you to pick the topics that will impact your organization.

The modules can include the following:

- **Leadership Styles and Approaches to Meet New Demands**: Leadership training covers diverse styles and approaches tailored to address evolving challenges, fostering adaptability and innovation to meet the dynamic demands of the modern business landscape.
- **Effective Communication:** Leadership training emphasizes the vital skill of effective communication, teaching leaders to articulate their vision, actively listen, and create a collaborative environment that enhances organizational success.
- **From Operations Management to Strategic Thinker:** Leaders are trained to transition from operational roles to strategic thinkers, understanding the broader impact of decisions and aligning actions with long-term organizational goals.
- **Team Building and Collaboration:** Leadership training focuses on fostering team synergy and collaboration, teaching leaders to build strong, cohesive teams that maximize individual strengths to achieve collective objectives.
- **Change Management:** Leaders learn effective change management strategies, enabling them to guide their teams through transitions, embrace innovation, and maintain stability amid organizational transformations.
- **Emotional Intelligence:** Leadership training emphasizes the importance of emotional intelligence, helping leaders understand and manage their emotions and those of their team members for improved decision-making and relationship-building.

- **Time Management and Prioritization:** Leaders are equipped with tools and techniques to manage time effectively, prioritize tasks, and maintain productivity to meet organizational goals efficiently.
- **Conflict Resolution:** Leadership training addresses conflict resolution, empowering leaders to navigate and resolve conflicts constructively, fostering a positive and collaborative work environment.
- **Decision-Making and Problem-Solving:** Leaders learn critical decision-making and problem-solving skills, enabling them to analyze situations, make informed choices, and address challenges effectively.
- **Ethical Leadership:** Leadership training instills a commitment to ethical behavior, emphasizing the importance of integrity, transparency, and responsible decision-making for sustainable organizational success.
- **Innovation and Creativity**: Leaders are encouraged to foster a culture of innovation and creativity, promoting an environment that nurtures new ideas and solutions to drive organizational growth.
- **Performance Management**: Leadership training includes strategies for effective performance management, enabling leaders to set clear expectations, provide constructive feedback, and drive continuous improvement within their teams.
- **Coaching and Effective Feedback**: Leaders learn coaching techniques and how to provide constructive feedback, facilitating the professional development of their team members and enhancing overall performance.
- **Adaptability and Resilience**: Leadership training underscores the significance of adaptability and resilience, preparing leaders to navigate uncertainties and lead their teams through change with resilience and agility.
- **Mentorship and Coaching**: Leaders are trained in mentorship and coaching skills to guide the development of their team members, fostering a culture of continuous learning and professional growth.
- **Diversity and Inclusion**: Leadership training emphasizes the value of diversity and inclusion, teaching leaders to create an inclusive workplace culture that harnesses the strengths of a diverse workforce for organizational success.

A Quick Overview

We designed this program to meet the needs of your organization. The structure allows you to decide on the most important topics and format for your organization. This program can be delivered through a multifaceted approach, incorporating a combination of in-person and virtual elements to accommodate diverse learning preferences and logistical considerations. Our flexibility allows you to fit the program to meet the needs of your organization.

The program can begin with a kickoff, where participants have the opportunity to engage in team-building activities, networking opportunities, and introductory sessions. This initial phase establishes a strong connection among participants and creates a conducive learning environment.

Future modules can be delivered through a mix of live and virtual sessions. Virtual sessions include interactive modules, guest speaker presentations, and group discussions facilitated through video conferencing platforms. Additionally, a coaching component can be integrated, providing personalized guidance and support. The program ends by allowing participants to consolidate their learning, share experiences, and strategize on implementing leadership concepts within their respective roles. This blended approach maximizes flexibility, accessibility, and application.

Our hybrid delivery model not only accommodates diverse participant needs but also leverages the advantages of technology to create a dynamic and scalable leadership development program.

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The SCP Emerging Leader Program ©

Emerging Leaders are your organization's future. Opportunity finds the prepared. This program is designed for the emerging leader or the individual who has been selected as a team lead or is deemed to have potential in the organization. It gives participants the actionable knowledge and tools needed to turn challenges into opportunities. It stretches critical thinking and problem-solving skills as it helps uncover and apply their greatest capabilities in their roles as future leaders. This program includes a Leadership Assessment and Leadership Coaching. This program also includes intersession assignments and selected readings, matches candidates with organizational mentors, and trains mentors in the skills required to ensure success. This program includes a capstone project where teams are challenged to identify an organizational challenge and develop potential solutions.

Before the program, we work with participants to develop the Core Curriculum for their organization and assist with the Emerging Leadership Selection Process. We will also work with participants to identify strategies and processes for mentor selection and mentee matching.

Topics Covered:

- Develop individuals' leadership philosophy in keeping with their values, their team's expectations, and their most critical leadership objectives
- Analyze emerging leaders' roles in developing an inclusive culture and allowing them to leverage this culture for optimal productivity
- Use their emotions more strategically for greater influence, stronger relationships, and higher levels of productivity from their teams
- Assess emotional intelligence
- Develop a clear understanding of how organizations achieve their mission and strategic objectives.
- Improve emerging leaders' critical thinking and problem-solving skills and understand how their leadership and communication styles influence their outcomes.
- Apply the problem-solving process to an identified situation

Possible Core Curriculum Topics:

- Leadership Essentials – The Extraordinary Leader
- Understanding Yourself and Others
- Problem Solving and Creativity Basics
- Emotional Intelligence
- Leadership Communication
- Negotiation
- Emotional Intelligence
- Healthy Conflict Resolution
- Resilience in Permanent Whitewater
- Developing Relationships for Personal and Professional Growth

Flexible and Customized Offerings in Supervision and Leadership

Developing tailored training programs for supervisors and/or leaders is of paramount importance in fostering effective leadership skills and ensuring organizational success. Leadership roles often come with unique challenges and responsibilities that require specialized knowledge and competencies. By creating tailored training programs, your organization can address the specific needs and demands of leadership positions, providing supervisors with the skills necessary to lead their teams successfully. Tailored leadership training programs allow organizations to align the content with their specific leadership philosophy, values, and organizational culture. Leadership styles can vary widely, and a one-size-fits-all approach may not effectively prepare supervisors for the nuances of their roles within a particular organization. Customization ensures that the training content reflects the leadership expectations, communication styles, and decision-making processes that are integral to the organization's success.

Our targeted leadership training programs contribute to building a cohesive and high-performing leadership team. By focusing on the unique challenges and opportunities within the organization, the training program can promote a shared understanding among leaders. This shared knowledge fosters collaboration, enhances communication, and establishes a common leadership language, all of which are crucial for driving organizational initiatives and achieving strategic goals.

The tailored approach to leadership training also supports the development of emotional intelligence and adaptive leadership skills. Supervisors often face complex and dynamic situations that require the ability to adapt, empathize, and make informed decisions. SCP's programs can include scenarios and case studies that reflect the specific challenges leaders may encounter in their roles, helping them hone their emotional intelligence and problem-solving skills in a context relevant to their daily responsibilities.
You will find that our customized training programs for supervisors or leaders contribute to the overall success and sustainability of an organization. By tailoring content to the specific needs of leadership roles, organizations invest in the development of a skilled, adaptable, and cohesive leadership team. This not only enhances the effectiveness of individual leaders but also strengthens the organization's capacity to navigate challenges, drive innovation, and foster a positive workplace culture.

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Non-Profits Training Program

Financial Management

Course Overview:

The three-session course on financial management for non-profits is designed to equip individuals with the essential skills and knowledge necessary to effectively navigate the unique financial landscape of non-profit organizations. Participants will gain a comprehensive understanding and will be able to apply skills of financial principles tailored to the specific needs and challenges faced by their non-profit. The curriculum emphasizes the importance of financial transparency, accountability, and compliance with regulatory frameworks, enabling participants to confidently manage financial resources, make informed decisions, and demonstrate fiscal responsibility within the context of their non-profit missions.

This course is designed so participants can engage in practical case studies, hands-on exercises, and discussions that bridge concepts with real-world applications.

Course Outcome:

By the end of the courses, participants will have acquired the skills necessary and receive a toolkit to navigate the financial complexities of non-profit organizations, ensuring the sustainability and success of their missions and long-term success.

Course Objectives:

At the conclusion of this course, participants will have the opportunity to:

- Develop proficiency in non-profit financial fundamentals
- Develop a mindset to develop a culture of financial transparency and accountability
- Align financial strategies with organizational goals
- Assess financial risks and make informed decisions

Topical Areas include:

- Cash management mechanism review/evaluation
- Financial statements (statement of functional expenses, balance sheets, income statements, generally accepted “healthy” ratios)
- Effective financial policies and procedures
- Setting books up for management and compliance
- Budgeting and the balance sheet’s role
- Risk management
- Finance monitoring and strategic decisions
- Structural changes (mergers, acquisitions, divestitures, strategic partnerships)

- Cost principles and administrative requirements applicable to federal financial assistance
- Financial assistance management
- Accountability
- Compliance
- Creative Thinking
- Financial Analysis
- Financial Assistance Management
- Organizational Awareness
- Planning and Evaluation
- Project and Program Management
- Relationship Management

Fundraising

Overview: The three-session course on fundraising for non-profits offers a comprehensive exploration of strategies and techniques to empower participants in effectively mobilizing financial resources to support their organizational missions. Covering a diverse range of fundraising methods, including grants, individual donations, corporate partnerships, and events, this course provides a holistic understanding of the fundraising landscape for non-profits. Participants will delve into the art of donor relations, cultivating long-term relationships, and leveraging technology and social media to amplify their fundraising efforts. Practical insights into crafting compelling fundraising campaigns, measuring impact, and adapting to evolving donor trends are integral components of the curriculum.

Outcome:

By the course's conclusion, participants will be equipped with the skills and knowledge necessary to develop robust and sustainable fundraising strategies, fostering the financial health and resilience of their non-profit organizations.

Objectives:

At the conclusion of this course, participants will have the opportunity to:

- Recall key terminology, ethical considerations, and legal regulations associated with fundraising
- Apply fundraising principles to create and execute comprehensive fundraising campaigns
- Critically evaluate the success and impact of fundraising initiatives, utilizing data analytics and performance
- Analyze and interpret the factors influencing donor behavior, the economic climate, and emerging trends in philanthropy.
- Assess fundraising models
- Define the board's role in successful fundraising

Topical Areas:

- Digital fundraising/hybrid or virtual event best practices
- Measures of fundraising effectiveness
- Fundraising campaigns and other common fundraising strategies
- The development plan
- Funding models
- The board's role in fundraising
- Legal and regulatory compliance

Board Development

Overview: The three-session course on Board Development for Non-Profits is designed to equip individuals with the knowledge and skills needed to cultivate effective and high-performing boards within the non-profit sector. Participants will explore fundamental principles of governance, ethical responsibilities, recruitment, onboarding, and the roles and responsibilities of board members. Emphasis will be placed on recruiting, retaining, and succession planning for diverse and skilled board members, fostering a culture of accountability, and navigating the unique challenges faced by non-profit boards. Through case studies, interactive discussions, and practical exercises, participants will learn strategies for effective board leadership, conflict resolution, and collaboration, ultimately enabling them to contribute to the strategic direction and long-term success of their non-profit organizations. The course aims to empower participants to build and sustain boards that are not only compliant with legal and regulatory requirements but also poised to actively support and advance the mission of the non-profit they serve.

Outcome:

The course will empower participants to build and sustain boards that are not only compliant with legal and regulatory requirements but also poised to actively support and advance the mission of the non-profit they serve.

Objectives:

At the conclusion of this course, participants will have the opportunity to:

- Explore Roles and Responsibilities of board and staff
- Implement board self-assessment to identify areas for improvement and set annual goals
- Examine the importance of board diversity, strategic planning, and fiduciary oversight
- Assess board committee structure for effective governance
- Create a board recruitment and development plan
- Review core components of effective bylaws and board structure
- Integrate understanding of board development by designing a comprehensive board development plan for a hypothetical or existing non-profit organization

Topical Areas:

- Nonprofit governance (officers, directors, committees)
- Roles of nonprofit staff vis-a-vis the board
- The board's recruitment, onboarding, self-evaluation, and engagement
- The board's role in fundraising
- Policies and procedures
- Succession planning for board members

Marketing/Communications

Overview: The three-session course on Marketing and Communications for Non-Profit Organizations is designed to equip participants with essential skills and strategies to effectively promote their missions and engage with diverse stakeholders – both internal and external. The initial module provides a solid understanding of how to craft a compelling and branded narrative that resonates with the organization's values and mission, forming the basis for effective communication and marketing strategies by understanding the audience.

The other sessions will focus on practical aspects of implementing marketing, communication, and crisis communication plans. Participants will explore various channels, including digital platforms and traditional media, and learn to tailor communication strategies to different audiences. Emphasis will be placed on utilizing storytelling, social media, and visual content to enhance engagement and build meaningful connections with donors, volunteers, and the community.

Outcome:
Participants will be equipped with the knowledge and tools to elevate the visibility and impact of their non-profit organizations through content creation, strategic marketing, and communications practices.

Objectives:

At the conclusion of this course, participants will have the opportunity to:

- Demonstrate an understanding of fundamental marketing and communication concepts for non-profit organization
- Create a communication plan by applying marketing and communication principles
- Understand the psychological and emotional aspects that underpin successful communication strategies
- Explore the significance of effective storytelling and visual communication in the non-profit sector, recognizing how these elements contribute to building a compelling narrative.

Topical Outline:

- Marketing plans/content calendars
- Internal and external communications strategies

- Communications audits
- Understanding audiences for your marketing
- Branding and communication
- Content creation
- Crisis communications

Grant Writing and Management

Overview: The three-session Grant Writing and Grant Management course for non-profit organizations is a comprehensive program designed to empower participants with the skills and knowledge needed to secure and effectively manage grants for their organizations. Participants will review the intricacies of grant writing, covering key components such as needs assessment, project design, budget development, KPI's and proposal submission. We will provide applicable exercises and case studies, where participants will gain hands-on experience in crafting compelling grant applications that align with their non-profit's mission, fostering the essential skills needed to successfully navigate the competitive grant landscape.

The course also reviews grant management, addressing critical aspects of post-award activities. Participants will explore strategies for establishing effective grant management systems, tracking program outcomes, and ensuring compliance with grant requirements. Emphasis will be placed on building strong relationships with funders, effectively communicating project impact, and addressing challenges that may arise during the grant implementation phase.

Outcome:

Participants will be well-equipped to not only secure grants for their non-profit but also to manage the entire grant lifecycle efficiently, maximizing the positive impact of the awarded funds, partnerships, and on their organization.

Objectives:

At the conclusion of this course, participants will have the opportunity to:

- Evaluate best practices and strategies for grant management, evaluating the various components of successful post-award activities
- Synthesize their knowledge of grant management by developing a comprehensive grant management plan for a specific project within their non-profit organization
- Craft a comprehensive grant proposal for a hypothetical non-profit project
- List key components such as needs assessment, project design, and budget development

Topical Outline:

- Federal grant standard forms, grants.gov, SAM.gov registration, UEI numbers, etc.
- The basics of federal grant management (Code of Federal Regulations Part 200) and compliance with federal regulations; how to prepare for audits generally

- Data gathering/community engagement methods/strategic direction for project development
- Partnership development for projects
- General project narrative writing
- Key performance indicators (KPIs) and project evaluation
- Project budgeting and tracking
- Internal grant management policies and procedures (e.g., procurement, personnel, financial/accounting systems, etc.)
- Forecasting and planning for sustainability
- Grant implementation documentation and record-keeping

***Note**: The purpose of this course is to teach skills applicable to a wide variety of funding opportunities, rather than highlighting individual grant programs and opportunities.

Human Capital (Human Resources)

Overview: The three-session course focusing on Human Resources and Human Resource Management for non-profits provides a comprehensive exploration of the unique challenges and opportunities in managing personnel within the context of mission-driven organizations. Participants will delve into the fundamental principles of human resource management, covering key topics such as recruitment, onboarding, employee relations, performance management, succession planning, and legal compliance specific to the non-profit sector.

Participants will focus on strategic human resource planning, emphasizing alignment with the organization's mission and goals. They will explore techniques for effective leadership development, team development, staff training, and conflict resolution, fostering an understanding of how human resource management can be a strategic asset in achieving the non-profit's objectives.

Outcome:
The course will equip participants with the skills needed to attract and retain top talent, foster a positive organizational culture, and navigate the complexities of HR functions within the constraints of non-profit budgets. Participants will gain a holistic understanding of human resource management principles tailored to non-profit organizations, positioning them to contribute to the development of a motivated and high-performing team within their respective non-profits.

Objectives:
At the conclusion of this course, participants will have the opportunity to:

- Recall key concepts such as legal compliance, recruitment strategies, and employee relations by applying it to a case study
- Explore the unique challenges and opportunities of human resource management in non-profits, understanding how the organizational mission and values influence HR strategies
- Utilize human resource management principles by developing a recruitment and onboarding plan

for a non-profit position
- Evaluate the impact of HR policies on organizational culture and performance within a non-profit setting
- Apply the understanding of strategic human resource management by developing a comprehensive HR strategy for a non-profit organization.

Topical Outline:

- Organizational structure (e.g., the organizational chart)
- Typical nonprofit structures
- Nonprofit employee recruitment, onboarding, and retainment
- Engaging teams remotely
- Personnel policies, including remote work policies
- Performance management processes/SMART goals

Program/Operations

Overview: The Program and Operations Management course for non-profits offers a strategic exploration of the essential skills and principles necessary to effectively plan, implement, and optimize programs within mission, vision, and value-driven organizations. Participants will delve into key aspects of the program design, monitoring, and evaluation, gaining insights into best practices for aligning programmatic activities with the overarching goals and mission of a non-profit. The course covers operations management, addressing logistical and administrative functions critical to sustaining non-profit operations, such as budgeting, resource allocation, and stakeholder engagement. It will also focus on strategic program development and scaling, emphasizing the integration of data-driven decision-making and the utilization of technology to enhance efficiency. Participants will explore techniques for assessing program impact, measuring outcomes, and adapting strategies based on evolving needs and community dynamics.

Outcomes:

Participants will be equipped with the tools and knowledge needed to manage the programs/operations aligned with the unique challenges and opportunities present in the non-profit sector, fostering organizational resilience and mission accomplishment.

Objectives:

- Recall key concepts such as budgeting, resource allocation, and stakeholder engagement.
- Explore and refine the mission, vision, and value statements
- Review how various operational functions, such as logistics and administration, contribute to the overall efficiency and effectiveness of an organization
- Apply operational management principles by creating a comprehensive budget and resource allocation plan for a non-profit organization
- Investigate the challenges and opportunities in non-profit operations

Topics Covered:

- Mission, vision, and value statements
- Theory of change
- Program evaluation and the cost-of-service delivery
- Planning (strategic, paradigm, scenario, business)
- Operating models
- Volunteer management
- Dashboards and other impact measurement systems

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Train the Trainer Program

Program Length: All programs are ½ day

SCP's Train the Trainer (TTT) series is designed to equip individuals with the skills and knowledge necessary to become effective trainers. The program includes an overview of adult learning principles and instructional design concepts. Participants learn how to create engaging and effective training materials, design curriculum, and develop learning objectives that align with their organizational goals. This includes instruction on selecting appropriate training methods, technology integration, and creating interactive and participatory learning experiences. The emphasis is on providing trainers with the tools to adapt to diverse learning styles and engage participants effectively. We incorporate the concepts of neurodiversity into the learning experience. Another aspect of the Train the Trainer series includes instructions on assessing training effectiveness, measuring learning outcomes, and continuously improving training programs. Participants learn how to gather feedback, evaluate participant performance, and make data-driven decisions to enhance the overall impact of their training initiatives.

Other aspects of a Train the Trainer series focus on delivery techniques and facilitation skills. Trainers learn how to manage group dynamics, handle questions, and foster an inclusive and supportive learning environment. Effective communication, presentation skills, and strategies for managing challenging situations are covered. Participants engage in practice sessions where they deliver portions of training modules, receiving constructive feedback from peers and our credentialed facilitators. This hands-on experience helps build confidence and ensures that trainers are well-prepared for their future training responsibilities.

The Train the Trainer courses empower individuals with the expertise and confidence needed to deliver impactful and successful training sessions within their organizations.

Training Needs Analysis

Overview: Today's work environment requires employees to be skilled in performing complex tasks in an efficient, cost-effective, and safe manner. Training (a performance improvement tool) is needed when employees are not performing up to a certain standard or at the expected level of performance. The difference between the actual level of job performance and the expected level of job performance indicates a need for training. The identification of training needs is the first step in a uniform method of instructional design. A successful training needs analysis will identify those who need training and what kind of training is needed. Training Needs Analysis helps to put the training resources to good use.

Topics Covered:

- Gap analysis
- Critical success factor analysis
- Work analysis
- Audience analysis
- Technical analysis

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Best Practices in Building a Train the Trainer Program

Overview: The purpose of the Train the Trainer model is to train upcoming instructors. During the Train the Trainer program, learn the best possible ways to deliver training materials to other employees. This program reviews considerations around a successful Train the Trainer program.

Topics covered:

- The foundational elements of training
- Design concepts in developing your program
- Methods to teach trainers foundational elements of training
- Observation and feedback

Adult Learning | Delivering Training in a Virtual Environment

Overview: This course provides an overview of the foundational knowledge of the theory underlying best practices for adult learning in the workplace. It also highlights effective strategies you can add to your learning and education toolbox. By employing collaborative learning activities, you will be able to make adjustments as needed in your training

Topics covered

- Adult learning principles
- Applying lessons to virtual training
- Designing training to meet needs

Success with SMEs Developing Curriculum

Overview: Subject Matter Experts (SMEs) provide the content that makes a course informative. Their technical expertise can be overwhelming, yet we must keep it at a level that focuses on the "need to know." So, where's the balance? This course provides helpful tips for getting the most from your SME without letting their expertise overwhelm the course focus. By employing collaborative inquiry in the instructional design process, we will discuss the process and important questions to ask SMEs in designing technical training.

Topics Covered

- Working with SMEs
- Focusing the content
- Addressing objectives with the SME
- Review of materials by SME

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Curriculum Development | The Basics

Overview: The curriculum development process systematically organizes what will be taught, who will be taught, and how it will be taught. Each component described affects and interacts with other components. Your methodology is influenced by your learners, what they need to know, and the setting in which you will instruct. In considering the three components of your design method, we will review the essential elements in designing curriculum.

Topics covered:
- Introduction to curriculum development
- Needs assessment
- Curriculum models
- Curriculum planning
- Instructional design
- Assessment and evaluation

Learner Engagement

Overview: Learner engagement is a measure that reflects the quantity and quality of a learner's participation in their courses and every other aspect of their educational program. Also, it echoes a learner's interaction and cooperation with co-learners and instructors.

In other words, learner engagement is the measure of a potentially successful learning experience for everyone concerned.

Topics covered:
- Strategies for engaging the learner
- Difficult participants
- Tie into previous learning
- Developing activities

Microlearning

Overview: This course teaches the basics of developing microlearning. Microlearning refers to an educational approach that offers bite-sized, small learning units with just the necessary amount of information to help learners achieve a goal. The content areas will provide a comprehensive foundation for learners to understand, design, and implement microlearning principles effectively in various educational and organizational settings.

Topics covered:
- Introduction to microlearning
- Designing microlearning modules
- Technology and tools for microlearning
- Assessment and feedback in microlearning
- Implementation and integration

Facilitation Best Practices

Overview: Facilitation is the act of engaging participants in creating, discovering, and applying learning insights. In contrast to presentation – which is typically characterized by a "sage on the stage" delivering content to an audience – facilitation usually involves a "guide on the side" who asks questions, moderates discussions, introduces activities, and helps participants learn. This program involves developing the skills and knowledge necessary to guide groups through processes, discussions, and activities to achieve specific goals.

Topics covered:

- Facilitation fundamentals
- Communication and active listening
- Facilitation techniques and tools
- Problem-solving and decision-making
- Facilitating difficult situations

Sustaining Behavioral Change

Overview: Gone are the days when trainers focused solely on providing training and then testing the learners for their understanding of the content. Our role has grown. We see now that we are also responsible for influencing behavior and performance. Learner behavior indicates the way in which people respond and apply. We need our learners to apply lessons learned when faced with a particular situation.

Topics covered:

- Set clear expectations
- Reinforcement and recognition
- Coaching and mentoring
- Application in real-world scenarios
- Peer learning and support

Creating Job Aids

Overview: This comprehensive course on job aid development is designed to equip participants with the knowledge and skills necessary to create effective and user-friendly tools that support job performance. The course begins with an exploration of the principles and theories behind job aids, emphasizing their role in enhancing workplace productivity and learning. Participants will gain a solid understanding of the different types of job aids, such as checklists, flowcharts, and quick reference guides, and the situations in which each is most effective.

Topics covered:

- Understanding job aid types and applications
- Needs assessment and target audience analysis

- Design principles for effective job aids
- Technological integration and digital job aids
- Testing, evaluation, and iterative improvement

The Kirkpatrick Model

Overview: The Kirkpatrick Model is probably the best-known model for analyzing and evaluating the results of training and educational programs. It takes into account any style of training, both informal and formal, to determine aptitude based on four levels of criteria. The Kirkpatrick Evaluation Model was created by Donald Kirkpatrick, Ph.D., to define the four levels of training evaluation. The four levels of evaluation are: (1) the reaction of the participants and their thoughts about the training experience; (2) the participant's resulting learning and increase in knowledge from the training experience; (3) the participant's behavioral change and improvement after applying the skills or knowledge on the job; and (4) the results or effects that the participant's performance has on the organization.

Topics covered:

- Introduction to Kirkpatrick's four levels
- Level 1: reaction (affective domain)
- Level 2: learning (cognitive domain)
- Level 3: behavior (behavioral domain)
- Level 4: results (results domain)

ADDIE

Overview: The ADDIE model (Analysis, Design, Development, Implementation, and Evaluation) is an iterative process used by instructional designers and program designers to carefully consider all the elements of learning to the best result.

In ADDIE, we carefully consider each step before moving on to the next one. A well-designed program gets results; therefore, SCP embraces the ADDIE Model's concepts to design, develop, and review educational material.

Topics covered:

- Description of the model
- The importance of designing with Addie
- Overview of each element
- The basics of ADDIE

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Neurodiversity

Overview: Neurodiversity, also called neurodivergence, is the concept that not all people think, process information, or react to their environment in the same way, and that those differences are normal. There is no one "right" way of thinking and there's not a "right" way to learn either. All your learners are probably a little different from one another, and many of them may fall somewhere under the neurodiverse umbrella. It may seem daunting to accommodate all their needs, but by creating inclusive training you can make learning accessible for everyone, and that will help all your learners, your team, and your organization as a whole.

Topics covered:

- Defining neurodiversity
- List challenges of neurodiversity
- Describing the strengths/benefits of neurodiversity
- Understanding ourselves and our neurodiversity
- Apply strategies to implement in designing your training

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Inclusion, Diversity, Equity, Allyship (IDEA)

Addressing Micro-Triggers and Micro-Inequities in the Workplace

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: Have employees or leaders in your organization ever experienced a tense moment while at work? People sometimes speak without thinking. The words sometimes hurt feelings, cause frustration, and are offensive to others. Employees and leaders may hear or say something that is inappropriate, but they don't know how to react, what to say, or what to do. Participants will learn how to identify and address these micro-triggers and micro-inequities and how to respond when they become aware of their own missteps. Let these experiences become avenues for enhanced inclusion and understanding for all.

Topics Covered:

- Inappropriate or offensive comments and actions
- Emotion-based tensions
- Emotional intelligence strategies to deal with tense situations
- Strategies to help you stop and think

Allyship

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: Allyship is part of SCP's diversity training suite that helps employees learn about research-backed actions to enable them to show up as allies. We cover two important aspects of allyship: defining allyship and its importance in the organization and discussing and practicing skills of allyship in a safe setting to give employees the confidence to make a difference. We also stress employees' responsibility and power in creating the change they want to see in the organization.

Topics Covered:

- Definition of allyship
- The importance of allyship
- Allyship skills
- Applied practice

Celebrating Generations

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: For the first time in history, four distinct generations are employed side by side in the workplace. Not only are they side by side, Generations Y and X sometimes supervise Veterans and Baby Boomers. With differing values and seemingly incompatible views on leadership, when employees of these four generations are on the same team, there can be unprecedented conflict. Eliminating generational discord, understanding similarities and differences, and being flexible are essential in understanding what makes members of each generation tick.

Topics Covered:

- Overview of the four distinct generations in the workforce
- The differences between generations
- The socialization of each generation
- The motivators and expectations of each generation
- The process of resolving conflict across generations

Embracing Empowerment and Creating a Culture of Inclusion and Engagement

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: This course provides managers with ways to engage and empower employees and build an inclusive working environment. During this program, participants will discover tools to help foster inclusive behaviors. The program will target and deploy key leadership diversity, equity, and inclusion skills in coaching, delegating, providing feedback, and communicating with employees within their organization.

Topics Covered:

- Empowerment and its role in creating a culture of inclusion
- The leader's role in engagement and in creating an inclusive environment
- Plans to deploy leadership skills and competencies that develop an inclusive workplace

IDEA 101 for Leaders

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: A connection exists between leadership and diversity and inclusion. Leadership is about knowing people, building relationships and empowering people. Leaders need to bring out the best in people, which they do by making them feel included, accepted, respected, and connected to their team and to the organization. When people feel good about themselves and their team/organization, they perform better individually and as part of a team, resulting in an organization that performs better.

This session defines Diversity, Equity, Inclusion, and Allyship and introduces strategies that leaders can utilize to improve their IDEA effectiveness. Through group discussions (e.g., polls and group chats during virtual sessions), we explore ways to improve their personal DE&I journeys. We will also discuss the importance of enhancing awareness and challenge participants to expand personal boundaries to enable more effective interaction in the workplace.

Topics Covered:

- Definition of IDEA
- The leader's role
- Terms that impact understanding
- Bias (overview)
- Micro behaviors (Overview)

IDEA 101 (Workforce)

Course duration: Abbreviated half day or full day
Course format: Classroom ILT, Virtual ILT

Overview: In this interactive session, we define Inclusion, Diversity, Equity, and Accessibility/Allyship (IDEA) and introduce strategies that individuals can utilize to improve their IDEA effectiveness. We will have group discussions, polls, and group chats to explore ways to improve participants' personal IDEA journeys. We will also discuss the importance of enhancing awareness and challenge participants to expand personal boundaries to enable more effective interactions in the workplace.

Topics Covered:

- The basic concepts associated with diversity, equity, inclusion, and equal employment opportunity (EEO)
- The business case for IDEA
- How the various aspects of diversity are important to the diversity equation
- The impact of stereotypes and unconscious bias on individuals
- The Diversity, Equity and Inclusion (DEI) Growth Track
- Behaviors and issues related to improving IDEA effectiveness

Micro-Behaviors

Course duration: Abbreviated half day or full day
Course format: Classroom ILT, Virtual ILT

Overview: Micro-behaviors are the tiny, often unconscious things we say and do that make those around us feel included, valued and motivated – or excluded, unappreciated, and disrespected. Biases play out in the workplace through micro-messaging, micro-inequities, and micro-aggressions. This contributes to people feeling insignificant. This course identifies these micro-behaviors.

Topics Covered:

- Micro-inequities
- Micro-aggression
- Micro-messaging
- Micro-affirmations
- The connection between diversity, bias, stereotypes and behavior
- The impact of micro-behaviors on individuals
- The impact of micro-behaviors in the workplace
- Strategies to responding to micro-behaviors

Race and Ethnicity

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: Categorizing humans based on shared physical or social qualities into groups is generally viewed as distinct within a given society. Ethnicity is social categorization based on an individual's membership in or identification with a particular cultural or ethnic group. Training and education are essential tools in any workplace that is looking to build a culture of dignity, respect, and tolerance.

Topics Covered:

- Definitions of race and ethnicity
- The importance of understanding "differences"
- Respectful practices

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Race Relations and Cultural Competency: Standing Together in Today's Workplace

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: After hundreds of years of racial disparity, integration, and being the proverbial "mixing bowl," haven't we figured it out yet? Following a brief review of the path to equality, equity, and justice in America, this course will discuss our current standing and ways in which we can stand and work together to ensure that we reach the ultimate goal of achieving equity and full inclusion.

Topics Covered:

- Why and in what ways we are still struggling with "and justice for all"
- Cultural diversity and the unique aspects of different cultures in America
- Appropriate responses in the midst of racial tensions

Respect and Civility in the Workplace

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: Respect and civility are present in a work environment where employees are respectful and considerate in their interactions with one another. Respect and civility are based on showing esteem, care, and consideration for others, and acknowledging their dignity. This course is designed to help organizations build a respectful and civil environment that not only improves morale, productivity, teamwork, and performance, but also results in healthier employees and enriching workplaces.

Topics Covered:

- Respectful practices
- The importance of valuing others
- Differences as a strength
- Benefits of respect and civility

Gender Discrimination, Gender Bias, and LGBTQ Sensitivity

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: During the last few decades, gender roles and bias, discrimination, and LGBTQ issues have become even more sensitive as our laws and cultural norms are changing nationwide. Most importantly, employees need to be treated with respect, be included, and be allowed to be themselves in the workplace. But what does that mean? During this course, participants will learn how to be more culturally sensitive and socially correct when addressing individuals in the workplace and managing discrimination claims.

Topics Covered in SCP's "Gender Discrimination, Gender Bias, and LGBTQ Sensitivity" Course:

- Elements contained in Title VII of the Civil Rights Act and their applicability at the state and federal levels and across sectors
- Terminology, key issues, and key aspects of gender identity
- Strategies for handling situations, behaviors, and workplace environments where discrimination, harassment, and/or gender harassment issues may be encountered

Sexual Harassment Prevention

Course duration: Half day
Course format: Classroom ILT, Virtual ILT

Overview: During the last decade, sexual harassment has become a subject of increasing concern. Sexual harassment is a form of discrimination that is counterproductive to an effective work environment. This very sensitive area can be difficult to deal with, disruptive to the workplace, and disagreeable to all concerned. The stakes are high and getting higher. In an increasingly litigious society and in an era of ever-increasing employee rights and employer responsibility, addressing these issues is of utmost importance. This course reviews the laws regarding sexual harassment, gives specific examples of harassing behavior, and discusses strategies to prevent and address sexual harassment.

Topics Covered:

- Definitions of harassment
- Title VII characteristics
- What is and what is not harassment
- Best practices for addressing sexual harassment

Understanding Bias

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: We tend to believe that we are seeing everything in its complete form; however, it's not possible for us to see the world as it is. Instead, we see the world through the lens of our experiences, biases, and various identity factors. As a result, the assumptions we hold shape the decisions that we make, but these decisions may be creating unequal outcomes. A strong link exists between employee retention and valuing diversity and inclusion; the intent of this course is to increase awareness about bias and everyone's responsibility in creating an inclusive and respectful workplace.

Topics Covered:

- Bias (implicit/unconscious and explicit) and how it's formed
- The impact of bias on the individual and the workplace
- Respectful behaviors we expect in the workplace
- The importance of being an upstander (ally)
- Accountability plans: what to stop, start, and continue as an individual contributor

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SCP DEIA Certificate Program

Interactive | Customizable | Proven Results

Individuals can make a difference! By providing training in valuing and managing diversity, individuals and organizations can help remove barriers to inclusiveness. Organizations can tap into the power of diversity to strengthen teams regardless of individual differences. The net result will be that everyone–regardless of race, gender, ethnicity, physical ability, age, and other dimensions of diversity–can make a full contribution to the organization's success.

So, **valuing diversity is the smart thing to do** from a business perspective because it positions organizations competitively in a rapidly changing, diverse marketplace. It is also the right thing to do because it creates an environment where people are fully included and valued for who they are and what they offer. From both perspectives, a well-executed diversity program enables employees and employers to create an environment where differences are valued.

SCP's **unique approach** to creating and implementing DEIA programs is experiential and highly interactive. SCP trainers have all received years of preparation in how to create and maintain an open, non-threatening learning community where people feel safe and where participants are encouraged to use their own experiences and to experiment and take risks in order to maximize their joint learning. The SCP DEIA Training Certificate Program will enable participants to learn how to apply practical tools, so they achieve meaningful results.

Knowledge Building

Part 1 of the program focuses on developing a deeper understanding of diversity, equity, inclusion, and accessibility. After each session, participants will be given an assignment to complete that will help in the application of the concepts. Pre-course review of meaningful DEIA-related material will enhance participants' learning and application.

Foundations of Diversity, Equity, Inclusion, and Accessibility/Allyship

This session highlights the business case for diversity, equity, inclusion, and accessibility. Part 1 of this training series will focus on establishing a foundational understanding of diversity, equity, inclusion, and accessibility. Participants will acquire knowledge of the basic concepts and appropriate terminology related to diversity, equity, inclusion, bias, equality, stereotypes, "isms," and micro-behaviors. It will help build understanding of diversity individually, their relationship to one another, and, most importantly how to apply diversity to workplace environments. This session will allow participants to deepen their understanding of how our identities shape who we are and what is meaningful to us as individuals. We will review many elements of diversity that create cultural competence.

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Bias, Stereotypes, and Micro-Behaviors

Participants will explore the interpersonal impact of bias and stereotypes using relevant workplace scenarios that participants will analyze and identify barriers to inclusion and possible solutions. Building on the knowledge of the individual and interpersonal impact of discrimination, this workshop will broaden understanding – including how discrimination operates at an organizational level. We will also review the impact – both personally and organizationally – of bias, discrimination, and micro-behaviors.

Effectively Establishing An Inclusive Environment – Allyship

While knowledge and awareness are important, they do not always produce change. This program focuses on the tools and skills required to be active and effective allies, so that meaningful changes and inclusive environments can exist within organizations. It stresses the importance of creating an inclusive environment through examination of strategies and techniques.

When there is inclusion, different groups – or individuals with different backgrounds – are accepted, welcomed, respected, and treated equally. Inclusion is a sense of belonging. Inclusive cultures encourage involvement and make people feel valued for who they are as individuals. People feel a level of supportive energy and commitment from others so they can do their best work and achieve their full potential.Participants will explore what effective allyship skills people can use in being an ally and, most importantly, how to respond to disrespectful and non-inclusive behaviors. Effective allyship translates to inclusion.

DEIA Training Facilitation

Part 2 of the program focuses on proven facilitation and curriculum design techniques to prepare participants to deliver powerful and effective DEIA training. In a “Building Your Workshop” session, participants will learn the essentials of designing interactive and engaging DEIA training workshops, including setting goals and objectives, tying “interactivities” into the training, and learning active training techniques. In this session, participants will also learn how to create a safe environment for all employees.

Facilitating DEIA workshops involves managing uncomfortable (and often controversial) conversations tactfully and respectfully. The facilitator has the opportunity to design and create a safe and inclusive space for participants, so they feel comfortable engaging in necessary conversations. The success of this depends heavily on the facilitator’s ability to create a safe and inclusive learning space for all participants. We will also discuss building scenarios and applying content to employee or customer needs. An intersession assignment will be to design an outline and create content for a two-hour DEIA training program.

Presentation And Critique

Participants will present their designs and an abbreviated segment of the course they develop; role playing may include seeing how participants react to disruptive students in the class and seeing how participants respond to feedback about the segment of the course they developed. Participants will receive feedback from the instructors on course design and delivery. Participants will then create a development plan and receive two post-program coaching sessions.

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Technical Training

Accounting 101

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: Master the technical skills needed to analyze financial statements and disclosures for use in financial analysis and learn how accounting standards and managerial incentives affect the financial reporting process. By the end of this course, participants will be able to read the three most common financial statements: income statement, balance sheet, and statement of cash flows. Then participants can apply these skills to real-world business challenges.

Topics Covered:

- Intelligent interpretation and use of financial statements in managing and analyzing operations
- Basic accounting terminology and the process by which transactions are analyzed and transformed into financial statements
- The structure and content of the income statement
- The current asset side of the balance sheet

Budgeting

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: When individuals are responsible for budgeting, it means they're playing a vital role in their organization's future. Budgets enable individuals to pinpoint critical variables that impact profit, so their organization can successfully pursue business goals and create value. In this course, participants will learn how to work with, develop, and present budgets aligned with strategic goals. Working in groups, participants will gather the information they need to construct and analyze operating budgets. Participants will practice evaluating and revising their budget to increase the chances of acceptance. This is participants' opportunity to gain the tools and insights to craft the budget their organization needs to overcome obstacles and achieve success.

Topics Covered:

- Overview of the planning and budgeting process
- Definition, purpose, and components of a budget
- Operating budget vs. capital budget
- Relationships and metrics of line items on the income statement and the operating budget
- Specific steps to improve the metrics
- Issues and challenges faced when dealing with assumptions and targets
- Revision and finalization of the budget

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Financial Management

Course length: Two days
Course format: Classroom ILT, Virtual ILT

Overview: Financial management is the practice of handling an organization's finances in a way that allows it to succeed and comply with regulations. That takes both a high-level plan and boots-on-the-ground execution. At its core, financial management is the practice of making a business plan and then ensuring all departments stay on track. Solid financial management enables participants to provide data that supports creation of a long-range vision, informs decisions on where to invest, and yields insights on how to fund those investments – as well as on liquidity, profitability, cash runway, and other issues.

Topics Covered:

- Liquidity and cash flow
- Compliance
- Financial scenarios
- Relationship managements techniques
- Risk assessment and management
- Strategies and financial decision making

Financial Skills for Non-Financial Managers

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: Financial skills are fundamental to any managerial position. Learn how to "think finance" and expand career opportunities. From accruals and write-offs to receivables and payables, this workshop shows non-financial managers the concepts, tools, and techniques that can help make each decision pay off – on the job and on the bottom line. This program for non-financial managers ensures that the basics of finance are understandable. Participants will learn how to:

- Interpret and respond appropriately to financial information
- Communicate individual and team contribution to the bottom line
- Uncover drains on profitability
- Make smarter decisions that deliver higher profitability

Topics Covered:

- Basic accounting
- Accounting and financial statement fundamentals
- Annual report review and analysis
- Financial statement evaluations
- Improvements to profitability through cost analysis and profit planning
- Major financial decisions supported by capital expenditure analysis
- Effective budgeting practices

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Introduction to Data Analytics

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: Participants will see real-world examples that demonstrate how data analysis tools work. Additionally, they will have a chance to apply some of the concepts to their own work, explore best practices for sampling, and examine how different types of sampling are each suited to different situations. Finally, participants will see real-world examples that demonstrate how those tools work and practice sampling techniques in case-study scenarios.

Topics Covered:

- Big data as it relates to individuals and organizations and how it can transform business processes
- Best practices for sampling and how bias can affect sampling
- Advantages and disadvantages of measurement methods
- Types of decision making based on model data, insights, and outputs

Introduction to Project Management

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Learning to manage projects effectively not only benefits organizations, but it also benefits individual employees and teams and the leaders who manage them. Today's organizations rely on employees who can carry a project from inception to completion – on time and on budget – making more efficient use of resources and achieving quality outcomes. Thus, being able to manage projects successfully makes everyone more valuable to their organizations and improves employees' career prospects by learning this critical skill.

Topics Covered:

- The four stages of a project
- Factors that make a project succeed
- Initiation and definition of a project's objectives
- Steps to move a project forward
- Strategies to keep a project on track

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Real-World Project Leadership

Course duration: Three days
Course format: Classroom ILT, Virtual ILT

Overview: The purpose of this course is to present the techniques and the "art" of modern project management. The material is intended to benefit the novice project manager as well as to teach additional skills and offer new insights to more experienced participants.

Topics Covered:

- Determination of the project's time, cost, and performance parameters
- Details and sequence of execution
- Key milestones and deliverables to ensure adherence
- Implementation of the work according to plan:
  - Monitor key parameters and milestones to ensure plan adherence
  - Complete the project through the final deliverables
  - Evaluate the project's success

Strategic Portfolio Management

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: Strategic portfolio management is all about shifting strategy into action via development portfolios – making smart prioritization decisions, executing strategic initiatives successfully, and ensuring benefits are realized. Today, more and more development is happening via agile techniques; additionally, portfolio management may be happening in *hybrid* mode – combining projects and agile development. Portfolio management is difficult by nature and many organizations are struggling in this area, even though super-smart portfolio managers are working hard in this domain. Strategic portfolio management is a challenging area – let's start with WHY portfolio management is important!

Topics Covered:

- What is Strategic Portfolio Management?
- What different viewpoints may exist in large companies?
- Portfolio maturity assessment starts with easy-to-use assessment questions and "maturity grid"
- Practical tools and methods to improve strategic portfolio management (e.g., Objectives and Key Results, or OKRs)

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Technical Writing

Course duration: One day
Course format: Classroom ILT, Virtual ILT

Overview: Technical documents come in many shapes and sizes – including, for example, annual reports, analytical summaries, reports of market research findings, explanations of HR policies, and strategic plans. No matter what content is covered and who the audience is, writing that informs people about complex topics can be considered technical writing. There is a lot riding on employees' and managers' ability to write technical documents. If the writing that your organization produces and distributes is confusing and hard to follow, readers stop reading (no matter how much time or research went into it). But when writing is clear and concise, readers will absorb what's being presented.

Topics Covered:
- Why subject matter expertise is critically important
- Outlines that help organize thoughts
- First drafts to review and refine your writing
- Messages between coworkers or managers to gain feedback
- Identification of what's not working and strategies to fix it
- Documents that grab attention and keep readers interested

Using and Presenting Analytics

Course duration: Two days
Course format: Classroom ILT, Virtual ILT

Overview: Learn how to be practical with the use of data analysis, turning business intelligence into real-world outcomes. We'll explore how a combination of better understanding, filtering, and application of data can help participants solve problems faster – leading to smarter and more effective decision making. Participants will learn how to use Microsoft Excel, PowerPoint, and other common analytical and communication tools. They will also learn how to present and explain data to others in a way that will get them to engage with one another.

Topics Covered:
- Data outputs to target audiences (e.g., management team and leaders)
- Main points, facts, insights, and recommendations
- Prompts that will produce the necessary action from the audience:
  - Visual communication
  - Audience and context
  - Charts, graphs, and images
  - Focus on important points
  - Design principles
  - Storytelling
  - Persuasiveness
  - Dashboards

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Workforce Development

Computer Skills and Information Technology

Course Duration: Half day
Course Format: Classroom ILT, Virtual ILT

Overview: This course will provide an understanding of computer concepts and general knowledge of computer use, enabling participants to work independently on a computer. Participants will be able to demonstrate how to navigate a computer operating system; explore and practice using the keyboard and mouse; access and search internet browsers; create and edit documents using Microsoft Word; and perform email tasks (e.g., set up an email account, create and send email with an attachment, etc.).

Topics Covered:

- Computer basics
- The keyboard and its functions
- Browser fundamentals
- The basics of Word
- Document development and editing

Cover Letter Essentials

Course Duration: Half day
Course Format: Classroom ILT, Virtual ILT

Overview: This course is intended to illustrate the importance and use of cover letters. Participants will be able to name and identify the parts of a good cover letter, draft and create cover letters while highlighting their skills and experiences and provide measurable examples of work while developing a professional cover letter.

Topics Covered:

- Purpose of cover letters
- Examples of powerful cover letters
- The importance of highlighting skills
- The structure and development of cover letters

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Dress for Success

Course Duration: Half day
Course Format: Classroom ILT, Virtual ILT

Overview: During this program, participants will receive sound advice, guidance, suggestions, and simple steps on dressing for success for the job. Participants will be able to discover ways to look professional and appropriate on any budget, discuss the importance of grooming considerations in the workplace, and apply techniques to develop a *personal brand*.

Topics Covered

- Individuals *are* the message – what are they saying?
- Grooming essentials for everyone
- Wardrobe essentials and budgeting
- The importance of appropriate attire

Résumé Writing

Course Duration: Half day
Course Format: Classroom ILT, Virtual ILT

Overview: Participants will learn about best practices in creating a professional résumé and how to relate résumés back to the positions they are applying for. They will create a marketable résumé for their portfolio for future employers, highlighting position-relevant skills and strengths. Participants will also learn how to apply for jobs online. (Homework: Completion of a résumé.)

Topics Covered:

- Résumé writing guidelines and tips
- Résumé analysis – good versus bad
- Résumé styles and formats
- Examples of the DO's and DON'T's of writing a résumé
- Guidelines for writing a good résumé and the importance of relating résumés back to the positions they are applying for, as well as highlighting appropriate skills and strengths
- Best practices in preparing and updating a professional résumé

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Strategies for Effective Interviewing

Course Duration: One day
Course Format: Classroom ILT, Virtual ILT

Overview: Being fully prepared by having different strategies for succeeding during and after the interview is essential if candidates want to make a great impression. In this course, participants will learn how to apply practical techniques to prepare for an interview. Participants will be able to plan for the interview, learn what to do during the interview, identify ways to increase chances of landing the job post-interview, and practice a successful mock interview.

Topics Covered:

- Elements of a successful interview presentation and how to prepare for an interview
- Behavioral-based interview questions and how to put them into practice
- Behavioral-based interviews and the STAR method
- Application of the STAR method when responding to an interviewer and "practice interview" techniques
- The importance of mock Interviews

Strong Interest Inventory (SII Assessment)

Course Duration: Half day
Course Format: Classroom ILT, Virtual ILT

Overview: The *Strong Interest Inventory* assessment helps individuals identify their work personality by exploring their interests in six broad areas: realistic, artistic, investigative, social, enterprising, and conventional. It then breaks these areas into 30 specific areas of interest that can be directly related to fields of study, careers, and leisure activities. In addition, the assessment describes an individual's personal style preferences in five areas: work style, learning environment, team orientation, leadership style, and risk taking. The report then ranks the individual's top five or ten most compatible occupations from a list of 260 specific jobs.

Topics Covered:

- The six General Occupational Themes (theme definitions, career fields, personal descriptors, leisure activities, and career motivators)
- Areas of interest to career choices
- Typical work tasks associated with some of the most satisfying occupations as well as the knowledge, skills, and abilities required to succeed
- Specific suggestions on preferred work environments
- Assessment review
- Exploration of career options and interests
- Career planning activities

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Time Management and Organizational Skills

Course Duration: Half day
Course Format: Classroom ILT, Virtual ILT

Overview: This session will give participants the tools to begin changing their habits concerning time management and organizational skills. The first step is learning – learning to change the way they think and understanding how to organize their time. We all face daily dilemmas – too much to do and not enough time to do it. Time and organization, not activities themselves, are the limiting factors. Organizational skills and time management are *self-management*. Although time is not adaptable, people are. Managing our time means adapting ourselves to the requirements of the job as well as to the demands of our personal lives. To get ourselves back in control means learning and managing new habits. Developing good habits – which are *learned behaviors* – is the key to good time management.

Topics Covered:

- Definition of time management, and why it is important
- The elements and benefits of time management
- Ten common time management mistakes
- The relationship between values, goals, responsibilities, and time management
- Organizing techniques and tips that can be implemented in the future
- The "Eisenhower Matrix" and other tools for organizing

Workplace Expectations

Course Duration: Half day
Course Format: Classroom ILT, Virtual ILT

Overview: Participants will identify the requirements of the workplace, discuss workplace responsibilities and accountability, and review any potential challenges. Participants will be able to illustrate workplace expectations and acceptable behaviors, practice effective time management and organizational skills, apply professional communication in the workplace, and demonstrate professional workplace standards.

Topics Covered:

- Workplace expectations
- The essentials of being a professional in your work environment
- Respectful communication
- The importance of timeliness and accountability

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Assessments

Assessments are a valuable way to help individuals better understand themselves. They can be used to identify strengths, weaknesses, values, motivations, and interests.

Some of these assessments also provide insight into how others are perceived and can help increase emotional intelligence and better manage interpersonal relationships. Ultimately, they help individuals make decisions that are better for themselves and for their organizations. participants.

The assessments SCP offers can be utilized to support a variety of purposes:
- Communication
- Conflict resolution
- Employee engagement
- Teambuilding
- Emotional Intelligence growth
- Leader development
- Team alignment
- Employee self-development

SCP offers debriefing sessions for individual development by certified professional coaches.

Clifton Strengths (Previously Called StrengthsFinders)

Course duration: Varies
Course format: Classroom ILT, Virtual ILT

Clifton Strengths™ (previously called StrengthsFinders) is a Gallup-sponsored assessment utilized by teams across all sectors to promote individual and team bonding and learning. The inventor, Don Clifton, had a strong desire to change the world through empowering human development. He created an assessment that was based upon helping people to discover their talents and learn what they truly do best. The growth and popularity of Clifton Strengths continues to expand; more than 90% of Fortune 500 companies have used Clifton Strengths to create a strengths-based workplace culture that encourages positive development and employee engagement.

Topics Covered:
- Individual profiles, participant handouts, take-away cards and activities
- The 34 strengths
- Tips to discovering your strengths
- How to recognize the strengths of others
- Approaches to maximizing the strengths of others
- Team profiles
- Online resources

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Core Strengths SDI 2.0 (Strength Deployment Inventory 2.0)

Course duration: One day; can be conducted virtually in three or four sessions of two-hours each
Course format: Classroom ILT, Virtual ILT

Overview: Strength Deployment Inventory is a practical and useful self-awareness inventory that increases relationship effectiveness. It is a "life inventory" based on relationship awareness® theory, a validated self-assessment tool that delivers proven business and personal outcomes by decreasing the underlying conflicts that diminish relationships.

The power of SDI is in how quickly and easily it inspires and motivates people to connect and really talk to each other. SDI facilitates strong relationships through:

- The insights people gain
- The acceptance it encourages
- The conversations it informs
- The trust it increases
- The conflict it decreases

DiSC

Course duration: Varies, depending on purpose and audience
Course format: Classroom ILT, Virtual ILT

Overview: Everything DiSC® is a personal development learning experience that measures an individual's preferences and tendencies based on the DiSC® model. But what is the DiSC model? The DiSC Model is a simple yet powerful model that describes four basic behavioral styles – D, I, S, and C – and serves as the foundation for each distinct Everything DiSC application.

- D: Dominance
- i: Influence
- S: Steadiness
- C: Conscientiousness

Individual assessments are a first step; they identify DiSC *styles*. The DiSC *system* is intended to be much more; it is designed to give people on a team a common language for understanding and discussing each other's tendencies and preferences. DiSC training is a way to introduce that system and its language. SCP offers a variety of programs using the DiSC theory and platform.

Sample of Training Offerings:

- Overview of DiSC Workplace
- DiSC Management
- DiSC and Communication

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EQ-I 2.0® and EQ 360®

Course duration: Varies
Course format: Classroom ILT, Virtual ILT

Overview: The Emotional Quotient Inventory (EQ-i 2.0) is the world's leading measure of emotional intelligence, applying decades of research to support effective human performance and development. The EQ-i 2.0 is an online self-rating assessment tool. Our engagement course provides participants with an in-depth examination of the competencies identified in the assessment. We also have interactive exercises to guide participants' thinking about results and to practice skills. Participants will learn how these fifteen competencies are critical for their personal development and success.

Like the EQi-2.0, the EQ 360 measures the same fifteen EQ competencies. It's a self-reporting assessment combined with the perceptions of people around participants. This will give participants valuable insight into their developmental areas as well as areas in which they excel.

Five Behaviors

Course duration: Varies
Course format: Classroom ILT, Virtual ILT

Overview: Based on Patrick Lencioni's international best-seller *The Five Dysfunctions of a Team*, The Five Behaviors® Powered by Everything DiSC® helps teams apply The Five Behaviors® model of Trust, Conflict, Commitment, Accountability, and Results to drive team effectiveness and productivity. The program uses Everything DiSC, a tool that helps build effective team communication and relationships, to help participants understand their individual DiSC® style and discover how each style brings value to the team.

Topics Covered:

- Individual Profiles
- Participant handouts
- Take-away cards
- Activities
- Online resources
- Research report

MBTI (Myers Briggs Type Inventory)

Course duration: Varies depending on purpose and audience
Course format: Classroom ILT, Virtual ILT

Overview: The MBTI can be a great tool to get to know your employees a bit better. The personality assessment was created by Katharine Cook Briggs and her daughter Isabel Briggs Myers. Their assessment is based on Dr. Carl Jung's Theory of Psychological Types. While several great personality tests exist, the MBTI (which is how we refer to it during this course), is one of the most well-respected and most widely used.

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Organizational Health and Wellness Program

Strategic Consulting Partners is committed to creating healthy workplaces in all forms because we are committed to people. We understand that investing in people and their mental and physical well-being both in and out of the workplace through comprehensive health and wellness programs has notable benefits in moving forward the mission of an organization.

Employee health and wellness programs can take many forms including programs for mindfulness, sound baths, meditation, movement practices, breathwork, community connection exercises, and emotional regulation practices. Sound frequency-oriented practices can be especially profound for over-stressed and over-stimulated employees. For example, recent studies suggest that certain sound frequencies can have positive effects on mental health by influencing electromagnetic activity within the brain. Studies show that auditory beat stimulation can help reduce anxiety by switching the brain into the Theta frequency range which can release endorphins that decrease blood pressure and heart rate and promote focus and creativity. Movement and emotional regulation practices that connect the mind and body through mindfulness (such as dance or other somatic-emotional practices) have been shown to decrease cortisol in the body, promote self-regulation from difficult emotions, and reduce chronic pain. Mindful breathing exercises can improve oxygen flow to the brain, aiding in mental clarity and cognitive function, and can help in managing anxiety symptoms, promoting a calmer and more focused mind.

These are just a few examples of the potential workplace benefits of investing in employee health and wellness programs:

Improved Employee Well-Being

Stress Reduction: Mindfulness and wellness practices are proven to reduce stress levels, which can lead to lower absenteeism and reduced healthcare costs.

Enhanced Mental Health: Regular mindfulness and wellness practice can alleviate symptoms of anxiety and depression, contributing to a healthier, more resilient workforce.

Improved Sleep: Meditation, movement, and other stress-reducing wellness practices can improve sleep quality which can lead to increased alertness and productivity during work hours.

Enhanced Emotional Resilience: Regular mindfulness practice can help employees build resilience, making it easier to handle workplace challenges and changes.

Increased Productivity

Focus and Concentration: Meditation and mindfulness practices enhance cognitive functions, leading to better focus and higher productivity.

Creativity and Problem-Solving: Mindfulness practices provide mental space for new ideas and perspectives and can stimulate creativity and enhance problem-solving skills, driving innovation.

Reduced Healthcare Costs

Preventative Health: By reducing stress and improving overall health, mindfulness practices can decrease the frequency of illness and the associated medical costs.

Chronic Condition Management: Employees with chronic conditions may experience fewer symptoms and need less medical intervention.

Enhanced Employee Engagement and Retention

Better Work-Life Balance: Encouraging mindful practices at work can help employees integrate these habits into their personal lives, promoting overall well-being and reducing burnout.

Job Satisfaction: Employees who feel supported in their well-being both in and out of work are more satisfied with their jobs, which in turn reduces turnover rates.

Organizational Health and Wellness Program offerings provided by SCP's qualified practitioners include but are not limited to:

Meditation & Mindfulness Practices:

Mindfulness 101

Course duration: 15 mins (conferences only), 30 mins, 1hr, or offered as an introduction session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT (virtual sessions limited to 1hr)

Overview: Our days are filled with the hustle and bustle of travel, back-to-back meetings, and overpacked schedules both at work and home, which can lead to employee disengagement and eventually burnout. This workshop will provide participants with an understanding of what mindfulness means and its beneficial effects on our central nervous system. Attendees will learn how to incorporate a manageable practice into one's everyday life. Through an interactive session designed to engage attendees at any level, we will explore the history, health benefits, and application of mindfulness with a micro assortment of mindfulness practices designed to inspire and equip attendees as they begin or reengage in their mindfulness journey.

Key Takeaways:

- Basic mindfulness practices
- Stress management
- Increased focus and concentration

- Creativity and problem-solving
- Increased mental agility

Sonic Serenity Sessions: Sound Bath

Course duration: 15 mins (conferences only), 30 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT (virtual sessions limited to 1hr)

Overview: Participants will be immersed in a restorative sound-frequency experience coupled with a guided meditation practice utilizing 432-hertz sound frequencies, which studies have shown can release endorphins and decrease blood pressure and heart rate which can result in more focused, calm, and engaged employees. Participants are invited to drop into their inner world and destress from the hectic workday by participating in basic mindfulness techniques to help build emotional resilience and significantly enhance focus, concentration, creativity, and problem-solving.

In-person sessions may include pillows, blankets, yoga mats, and blindfolds.

Accommodations and customization for all abilities and needs can be made to ensure each participant can engage comfortably and safely. Trauma-informed facilitators will be on-site for additional support.

Key Takeaways:

- Basic mindfulness practices
- Stress management
- Increased focus and concentration
- Creativity and problem-solving
- Take-home exercises

Journey to Inner Peace: Guided Meditation

Course duration: 15 mins (conferences only), 30 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT (virtual sessions limited to 1hr)

Overview: Studies have shown that regular meditation practice can alleviate symptoms of anxiety and depression, contributing to a healthier, more resilient workforce. Improved mental clarity and focus can lead to higher productivity and better performance. This guided meditation session includes a practice designed to help participants cultivate a sense of tranquility and balance within themselves and teaches basic meditation and mindfulness skills you can use in everyday life. Participants are invited to be in a comfortable seated position, either on a cushion or a chair, and provided with an optional blindfold, blanket, and aromatherapy (if desired) to help create a calm, safe environment on the journey inward. The session guides participants through breathwork, body scans, visualization, and relaxation, and culminates with a guided reentry to the day that can leave participants feeling more present, calm, focused, and engaged.

Key Takeaways:

- Basic mindfulness practices
- Stress management
- Increased focus and concentration
- Fostering creativity and problem-solving
- Increased mental agility
- Take-home exercises

Sowing Seeds of Mindfulness (or Mindful Creation)

Course duration: 90 Minutes, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT

Overview: Fostering creativity in the workplace is essential for innovation, problem-solving, and maintaining a competitive edge. By implementing employee creativity projects, companies can unlock the full potential of their workforce leading to increased engagement, higher productivity, and significant business growth. For kinesthetic learners, working on a project can be a path to engaging in mindfulness practice. In this workshop, we will explore the basics of mindfulness through short exercises and put them into practice through a creative avenue by mindfully creating an arts and crafts project or planting a seed of mindful intention with pots, soil, and a piece of paper where participants will be encouraged to reflect on what they want to grow more in their lives. This activity will give participants an ongoing opportunity to bring mindfulness and focus, concentration, and creativity to everyday life tasks.

Key Takeaways:

- Basic mindfulness practices
- Increased focus and concentration
- Fostering creativity
- Take-home exercises

Mindful Movement Practices:

Harmony in Motion: Mindful Dance & Movement

Course duration: 15mins (conferences only), 30 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT (virtual sessions limited to 1hr)

Overview: Incorporating mindful movement exercises like dance into a workplace wellness program can significantly enhance employee well-being, productivity, and engagement. Movement helps increase blood flow, which can be particularly beneficial for those with sedentary jobs. Mindful movement exercises such as dance or mindful stretching are effective in reducing stress levels which help enhance mental clarity and concentration, leading to better productivity and job performance. In this mindful dance or movement practice for all ability levels (standing or sitting), we invite you to explore the connection between body, mind, and spirit through movement. In this practice, we cultivate presence, awareness, and self-expression as we move in harmony with the music and with each other with gentle connection exercises. We start with setting an intention for our movement practice, becoming aware of the sensations in our body through mindfulness practices, and then expressing and moving emotions through our movement utilizing props such as shakers, scarves, or hand instruments, etc. We also incorporate and engage in group embodiment and connection exercises, and then close the practice with reflection and tips for how to bring this practice to your everyday life.

Accommodations and customization for all abilities and needs can be made to ensure each participant can engage comfortably and safely. Trauma-informed facilitators will be on-site for additional support.

Key Takeaways:

- Stress management
- Emotional regulation techniques
- Increased focus and awareness
- Fostering creativity
- Increased mental clarity and productivity
- Enhanced team morale
- Take-home exercises

Qigong Harmony: Gentle Stretching & Movement

Course duration: 15mins (conferences only), 30 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT (virtual sessions limited to 1hr)

Overview: Regular mindful movement can help alleviate tension in muscles, which is often caused by prolonged sitting or repetitive tasks. Gentle mindful movements like Qigong can help combat fatigue and boost energy, making it easier to stay productive throughout the day. A 5,000-year-old mind-body practice from China, Qigong has been used by world champion athletes as a warm-up because it gives a dynamic stretch that utilizes joint and tissue flossing, lubes up the joints, gives you a full range of motion, and also concentrates the mind for razor-sharp focus. It exercises breath control which can reduce anxiety, hence, why the practice is frequently used before athletic competitions. This Qigong course starts with intention setting, slow, gentle movements (sitting or standing) synchronized with deep breathing and a meditative focus, and then channels that focus into mindful movement. This practice can help cultivate focused awareness, increase range of motion, and reduce restlessness and anxiety throughout the workday.

Accommodations and customization for all abilities and needs can be made to ensure each participant can engage comfortably and safely. Trauma-informed facilitators will be on-site for additional support.

Key Takeaways:

- Increased productivity
- Increased focus and awareness

- Fostering creativity and mental agility
- Stress management
- Emotional regulation techniques
- Take-home exercises

Soulful Stroll: Mindful Nature Walk

Course duration: 30 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT only *

Overview: Mindful movement practices such as mindful walking can enhance creativity by providing mental space for new ideas and perspectives. Group sessions of mindful movement can also build a sense of community and improve overall team morale. On this group-guided mindful nature walking meditation, we invite you to immerse yourself fully in the beauty and serenity of the natural world. In this practice, we will engage all our senses to deepen our connection with nature, quiet the mind, and nurture our sense of presence and gratitude. The course starts with intention-setting and breathing exercises as we immerse ourselves in mindful movement while strolling through nature and closes with gratitude and reflection practices.

** If necessary, participants will be taken to a secondary location away from the work site. Permit costs may be added if the practice is intended as one offering during a half-day or full-day retreat outdoors.*

Key Takeaways:

- Enhanced team morale
- Stress management
- Increased productivity
- Increased focus and awareness
- Fostering creativity and mental agility
- Take-home exercises

Gentle Mindful Movement Practice: Basics of Yoga or Chair Yoga

Course duration: 1hr, 90 minutes, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT

Overview: Yoga, an ancient practice originating thousands of years ago in India, is designed to combine mental, emotional, and spiritual practices to enhance overall wellbeing. Yoga helps improve flexibility, strength, and posture, reducing the risk of injuries and chronic pain, particularly back and neck pain, which are common in office settings. Regular yoga practice reduces stress, anxiety, and depression. It promotes mental clarity and relaxation, contributing to overall emotional well-being. In this Yoga practice guided by a highly qualified Yoga Alliance Trauma-Informed Yoga Instructor, we will combine gentle movement, meditation, and breathing exercises to calm the nervous system, boost energy levels, reduce fatigue, and increase flexibility and strength. These offerings are provided both in-person and virtually to support employees who work remotely or in hybrid models, ensuring access to wellness activities regardless of their location.

Key Takeaways:

- Basic mindfulness practices
- Stress management
- Emotional regulation techniques
- Increased focus and concentration
- Increased flexibility and strength
- Take-home exercises

Emotional Regulation Practices:

Release & Renew: Emotional Freedom Technique (EFT) Tapping

Course duration: 15mins (conferences only), 30 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT

Overview: Emotional Freedom Technique (EFT), also known as "tapping," combines gentle tapping on specific meridian points with focused attention on emotional experiences to create profound shifts in our energy system. EFT is a powerful method for releasing emotional blockages, reducing stress, and promoting a sense of inner peace and well-being. In this session, we will guide you through a series of body-tapping sequences to help you release negative emotions, restore balance, and learn emotional regulation techniques for activating times in life. This practice begins with setting an intention, centering the body through breath and gentle movement, and tapping points throughout the body while thinking of emotions or experiences you wish to release. In this mind-body-emotional connection exercise, participants can learn how to attune to their emotions and emotionally regulate with more ease. The session closes with an integration practice along with tips to bring this practice into your everyday life.

Accommodations and customization for all abilities and needs can be made to ensure each participant can engage comfortably and safely. Trauma-informed facilitators will be on-site for additional support.

Key Takeaways:

- Stress management
- Emotional regulation and resilience
- Increased mental agility
- Increased focus and concentration
- Take-home exercises

STRATEGIC CONSULTING PARTNERS

Breath of Life: Mindful Breathing Exercises

Course duration: 15mins (conferences only), 30 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT

Overview: Our breath is one of the most accessible beneficial tools available to us to aid our body's natural healing abilities. The good news is that you don't need any special tools or background to access the healing benefits—you take your breath everywhere you go! Breathing exercises have numerous benefits, studies have shown mindful breathing exercises can lower cortisol levels, reduce stress, and stimulate the release of endorphins, improving overall mood and reducing feelings of depression. Mindful breathing exercises can also improve oxygen flow to the brain, aiding in mental clarity and cognitive function. In this session, we will explore various breathing techniques to help you harness the transformative power of your breath, including deep belly breathing, box breathing, alternate nostril breathing, and 4-7-8 breathing to release tension and cultivate a sense of inner peace and mindful awareness. We start by getting in a comfortable position, either seated or lying down. Pillows, blankets, and blindfolds will be provided to settle into a cozy space to connect with our minds and bodies. We close the practice with reflection and resources for bringing these practices to your everyday life.

Accommodations and customizations for all abilities and needs can be made to ensure each participant can engage comfortably and safely. Trauma-informed facilitators will be on-site for offerings for additional support.

Key Takeaways:

- Basic mindfulness practices
- Stress management
- Emotional regulation techniques
- Increased focus and concentration
- Increased mental agility and creativity
- Take-home exercises

Connection Practices:

Heart-to-Heart: Authentic Relating

Course duration: 45 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT

Overview: Being able to connect with others and yourself through a lens of compassion and authenticity is a valuable skill and practice that many are missing in today's fast-paced and technology-driven world. This course focuses on enhancing emotional intelligence through the practice of Authentic Relating to shift our mindset from transactional communication to authenticity. Authentic relating is about showing up as ourselves, listening deeply, and honoring the unique experiences and perspectives of each individual. Participants will delve into the core aspects of empathy, including understanding and connecting with others on a deeper level, as well as cultivating self-empathy. By developing these skills, attendees will improve their ability to communicate effectively and build stronger, more authentic relationships. In this session, we will create a safe space that allows participants to explore various exercises and practices to cultivate authenticity, vulnerability, and empathy in their interactions.

Exercises may include:

Relational Games*:* A set of activities or games designed to create an experience to dive deeper into a topic or concept to explore our perceptions and opinions and reflect and listen to others.

Sharing Circles*:* In smaller groups, we'll take turns sharing our thoughts, feelings, and experiences on a given topic while the rest of the group listens and uses active listening techniques to share the impact of what was heard.

Empathy Circles*:* Participants will share personal stories or experiences, and others will reflect back what they heard, validating and affirming the speaker's feelings and experiences.

Accommodations and customization for all abilities and needs can be made to ensure each participant can engage comfortably and safely. Trauma-informed facilitators will be on-site for offerings for additional support.

Key Takeaways:

- Enhanced team morale
- Team building
- Increased empathy and compassion
- Communication skills
- Fostering creativity
- Emotional wellness

Advanced Authentic Relating Courses (Heart to Heart: Authentic Relating Course Prerequisite)

**** Or Add-On to the Heart to Heart: Authentic Relating Course for a bundled rate ****

Feedback Capacity Building with Authentic Relating: Giving and Receiving

Course duration: 45 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT

Overview: This course is designed to improve your ability to give and receive feedback through the lens of Authentic Relating. Participants will learn how to deliver feedback in a way that fosters growth and understanding while also becoming adept at receiving feedback with openness and grace. The course emphasizes creating a safe and constructive environment for feedback and enhancing personal and professional relationships.

STRATEGIC CONSULTING PARTNERS

Creating Lasting Tools and Practices in Your Teams

Course duration: 45 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT

Overview: This course aims to equip teams with sustainable tools and practices derived from Authentic Relating principles to improve intra and interpersonal skills. Participants will learn techniques to enhance communication skills to foster a more compassionate, cohesive, and innovative team environment. The course covers practical methods such as regular check-ins and emotional hygiene practices to ensure that every team member feels heard, seen, and valued, leading to improved team dynamics and productivity.

Key Takeaways:

- Enhanced team morale
- Communication skills
- Emotional resilience
- Take-home exercises

Compassionate Connection: Non-Violent Communication

Course duration: 45 mins, 1hr, or offered as a session at a half-day or full-day retreat
Course format: Classroom ILT, Virtual ILT (virtual sessions limited to 1hr)

Overview: Today, many are stressed, anxious or pulled in too many directions which can lead to eruptions of emotion, unintended tone of voice, and inability to see value in others. Non-Violent Communication, developed by Marshall Rosenberg, is a powerful approach to communication and conflict resolution that emphasizes empathy, understanding, and connection. In this session, we will explore the principles and techniques of NVC to cultivate compassionate communication in our interactions with ourselves and others.

Exercises may include:

Reflective Listening: Partners will take turns sharing their observations, feelings, needs, and requests while the other person listens attentively without interruption or judgment. Afterward, the listener will reflect back what they heard, focusing on understanding and empathy.

Role-Playing: Participants will have the opportunity to practice applying NVC principles in simulated scenarios, experimenting with different ways of expressing themselves and responding to others' needs and feelings.

Empathy Circles: Participants will share personal stories or experiences while others offer empathic listening and reflection, validating and affirming the speaker's feelings and needs.

Accommodations and customization for all abilities and needs can be made to ensure each participant can engage comfortably and safely. Trauma-informed facilitators will be on-site for offerings for additional support.

Key Takeaways:

- Communication skills
- Emotional intelligence
- Enhanced team morale
- Emotional regulation and resilience
- Take-home exercises

Serenity Sanctuary Spaces

Enter the Serenity Sanctuary, a wellness advisor-curated low-stimulation space to escape into serenity throughout the workday (or for work conferences) with calming lights, peaceful music, soothing scents (if desired), elements of nature, and more. Wellness offerings may be provided in the space on a daily, weekly, or monthly basis or in rotating mini sessions (15 or 30-minutes) at a conference.

Trauma-informed facilitators will be on site for support during all organizational wellness offerings and serenity sanctuary spaces. Accommodations can be made to the exercises offered to ensure participants feel safe and free to participate comfortably at all ability levels. Accommodations could include sitting, standing, journaling, drawing, visualization, and storytelling to allow for freedom of expression and various learning and engagement styles. Journals, pillows, blankets, blindfolds, yoga mats, and other materials will be provided for an additional fee.

Session customization is available to meet your specific needs and audience. All sessions can be offered a la carte or in a series. Sessions can increase in complexity as participants engage and build skill levels through ongoing practice.

These sessions may be offered together or separately in the following formats, in-person and virtually:

- Micro-sessions: 45mins – 1 hour
  - Multiple micro sessions may happen concurrently with the use of wireless headphones.
  - Mini offerings (15-30 mins) are available for attendees to get a sampling of the practices and offerings within half or full-day retreat or conferences through a Serenity Sanctuary Space hosted by Strategic Consulting Partners Mindfulness & Wellness.
- 90 mins – 2 hours
- Half-Day Retreats
- Full-Day Retreats

Course customization is available based on the client's unique needs.

Package #1 - Mindfulness Meditation (6 months)
Mindfulness 101 + Journey to Inner Peace Meditation + Walking Meditation + Sowing Seeds of Mindfulness + Breath of Life

Package #2 - Mindfully Healthy (6 months)
Mindfulness 101 + Walking Meditation + Healthy Habits + EFT Tapping + Mindful Movement + Breath of Life

Package #3 - Mindful Movement (6 months)
Mindfulness 101 + Walking Meditation + Mindful Movement + Yoga/Chair Yoga + EFT Tapping + Qigong

Package #4 - Healing with Sound (3 months)
Mindfulness 101 + Sound Bath + Journey to Inner Peace Meditation

OR

3 months of Mindfulness
Includes Mindfulness 101 + 2 additional workshops + weekly virtual meditation/movement class

6 months of Mindfulness
Includes Mindfulness 101 + 5 additional workshops + weekly virtual meditation/movement class

12 months of Mindfulness
Includes Mindfulness 101 + 10 additional workshops + weekly virtual meditation/movement class + celebratory picnic/mindful movement dance party

Contact our Wellness Advisor, Ariel, for more information about creating a wellness program for your organization! ariel@yourstrategicconsultant.com

Sources:

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- https://www.proquest.com/openview/6906881cc51cd21c9a1d8c2ed7bd03a9/1?pq-origsite=gscholar&cbl=2035815
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STRATEGIC CONSULTING PARTNERS
JAMA ENTERPRISES INC

Request for Proposal 71412503
Leadership Coaching

Vendor Screening/Negotiation Questions and Case Study

Virginia Tech

Submitted By:

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CAGE Code: [redacted]
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Leadership Coaching Vendor Screening / Negotiation Questions AND Case Study

Company Background & Experience

1. **What industries do you specialize in?**

For 30 years, SCP has served clients across all business sectors, including federal, state, and local government agencies, nonprofit organizations, corporations, and commercial enterprises. Our bench of coaches has broad experience in various industries and agencies. In the last year, SCP has had interviews and has on-file agreements with dozens of coaches. We are confident we can find an effective coach for every engagement.

2. **Can you provide case studies or testimonials from past clients?**

Yes. SCP has completed several major organizational development contracts with coaching components.

U.S. Nuclear Regulatory Commission (NRC)

SCP successfully fulfilled a sole-source, single-award IDIQ contract for the U.S. Nuclear Regulatory Commission that included Organizational Development, including executive coaching services. Most of SCP's coaching engagements are 9 to 12 months in duration. This contract concluded in 2024 after all options years.

SCP garnered feedback from NRC clients through two surveys, a 2021 and 2024 release. The first survey requested feedback from the nearly 70 leaders coached by SCP during the contract. SCP received feedback from 52% of the leaders; 97.3% of those who responded found value in the coaching services, with 92% sharing that the coaching was extremely or very valuable. Only one leader did not find the engagement valuable. For this one instance, the feedback was provided by a leader who received a 360-debrief coaching session. Further comments from this leader indicated that the engagement was not long enough to give the value they would seek from coaching. The following were key findings from the survey.

- All respondents found the tools and/or training the SCP coaches provided helpful. 76% found the tools extremely helpful, while 24% found some value in the tools.
- All respondents shared that the consultants supporting them were helpful. 95% rated the consultants as extremely helpful or very helpful.

All comments were positive when asked to provide feedback on the engagement and SCP's consultant. The following comments are worth noting from this survey period:

- Todd Dallanegra is a phenomenal coach! When beginning my work with him, he had me fill out a number of tools to shape how our coaching sessions would go. He was masterful in shaping our sessions to allow me to use the time as I best saw fit, but he was always ready to inject new tools and techniques to ensure we made the most of our time together. Early in our work, he asked if I was open to introducing a spiritual component to our discussions, which I enthusiastically accepted, and our discussions have helped me become a better leader and person! I was transitioning to a new job when my sessions were scheduled to end, so I secured additional sessions. Todd masterfully helped me through this transition by working with me to identify specific challenges and providing additional tools to address those challenges. I offer the highest recommendation for Todd to anybody seeking coaching!

- Tony is an outstanding coach. He supported me through very challenging leadership situations. I would love to retain Tony as my coach if possible. His understanding of the agency and federal leadership challenges has been invaluable.
- I found my coaching sessions with Megan extremely helpful and insightful for working through the challenges of being a team lead and interfacing with executive leadership. Megan's coaching helped me work through issues I was facing, consider my future career goals, and develop my leadership abilities.
- Annette has provided incredible support to our region for several years. Her engagement with our team in delivering the unconscious bias program was exceptional. She is one of the best facilitators NRC has engaged.
- The 360 debrief was awesome! Thank you for helping me understand the results and what to do with them!
- Rick was very supportive during a challenging time in my leadership career. I appreciated using him as a sounding board.
- Thank you, Tony, for providing a safe place for me to work through the challenges I am experiencing in leading my team. Your sage wisdom has given me a new lease on leadership.
- Olga is an excellent coach. She helped me unlock my potential by challenging me to address my fears.
- This was a great experience for me overall, and I really benefited from my sessions with Gary.
- Tim was so easy to talk to. He always provided solid feedback and sent resources for future reference after each session. His help truly shaped my management style for the better.
- Faith was a fantastic listener, very supportive, and provided meaningful feedback.
- Todd was great--he helped me work through some challenges and develop strategies to succeed in a new position.
- I have enjoyed working with Lisa over the past few months. I wish our engagement could continue.

A Contractor Performance Assessment Report (CPAR) is available for this work and includes the following observations from the Assessing Official:

- QUALITY: Credible senior consultants who bring a breadth of expertise in change management, organizational development, executive coaching, performance management, emotional intelligence, conflict resolution, etc. Many of our senior leaders have expressed satisfaction with their assigned coaches, and some have requested that their executive coaching be extended.

- SCHEDULE: All task orders have been completed on schedule. Strategic Consulting Partners (SCP) Senior Organizational Development consultants adjusted their presentation in real time to provide on-scheduled delivery of OD services.
- COST CONTROL: Costs are within negotiated rates, and hours expended are reasonable.
- MANAGEMENT: Program Sponsor/Manager has been responsive in coordinating necessary services over multiple task orders with prime and subcontractor suppliers. Specific interventions this year required SCP to go above and beyond to support unusually difficult situations. With patience, skill, and tact, SCP analyzed the OD needs of our clients and provided valuable and practical tools that enhanced the engagement activity and moved situations forward in a most helpful manner. In each case, all task orders have been fulfilled. Customer survey data and verbal feedback have been collected, analyzed, and incorporated to continuously improve service delivery and customize solutions specific to the needs of this organization.
- RECOMMENDATION: Given what I know today about the contractor's ability to perform following this contract or order's most significant requirements, I would recommend them for similar requirements in the future.

The full CPAR is included in the appendix.

Virginia Housing

SCP has supported organizational development for Virginia Housing for over five years and recently renewed our Masters Service Agreement (MSA) for another year. Michelle Prosser, Director of Talent Development and Learning at Virginia Housing, had this to say regarding our service:

“SCP is Virginia Housing’s trusted learning, OD, and coaching partner. We are extremely pleased with SCP's high-quality work and sensitivity and turn to them for work that requires skill and knowledge. After a very well-received training program delivered in 2018 by Monica Gould, Virginia Housing decided to engage with SCP in a 5-year master service agreement. SCP now provides our team members with training, team building, and executive coaching. The SCP team of facilitators and coaches has all been exceptional. We look forward to working with SCP for years to come. We recommend them very highly.”

U.S. Department of Agriculture AMS Dairy Program

Work has been expanding since 2019 when SCP was engaged to assist with an assessment of their slowly declining Federal Employment Viewpoint Survey (FEVS) score's root causes. SCP has conducted training for leaders and emerging leaders. We provided DiSC analysis and training for all staff. FEVS scores have been rising since our engagement, and in 2023, there was a 20% increase in one year due to our ongoing work. The USDA Dairy Program's leadership team has requested additional training and coaching services in 2024. SCP delivered one cohort of a pilot leadership development program for emerging leaders in early 2024. Additionally, Individual orders have contracted DiSC training and coaching services in 2024 under separate vehicles. In late 2024, SCP won competitive bids to deliver Emerging Leader and Supervisory Leader Programs with coaching sessions for the Dairy Program, which was launched in 2025. Those programs also included coaching services.

Coaching Approach & Methodology

3. **How do you ensure your coaches stay up to date with the latest leadership trends and best practices?**

All SCP coaches have obtained a minimum of ICF ACC certification. Most have master's degrees and various certifications to administer multiple assessments.

As a part of ICF accreditation, coaches must commit to continuous learning. Coaches must log hours for coaching, submit a video to the ICF board, and sit for an exam. ACC accreditation is rigorous and requires a significant time investment. Each subsequent level, including PCC and MCC, requires similar requirements for continuous learning to achieve and maintain the certification. ICF accreditation information is available at https://coachingfederation.org/professional-coaches/eligibility-requirements.

4. **What coaching methodologies do you use?**

SCP follows the ICF's philosophy of Professional Coaching, which is defined as Partnering with Clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential. As our firm's name suggests, *Strategic Consulting Partners* is exactly how our team views coaching; SCP will provide expert Professional Coaches who will serve as mentors and advisors to the Federal Leaders who participate in the coaching program.

The SCP team values and abides by the principles, processes, and competencies of professional coaching as determined by the International Coaching Federation (ICF). The ICF defines coaching as partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential, which is particularly important in today's uncertain and increasingly complex environment. Coaches honor clients as the experts of their lives and work, believing every client is creative, resourceful, and *whole*. Standing on this foundation, the coach's responsibility is to:

- Discover, clarify, and align with what the client wants to achieve
- Encourage client self-discovery
- Elicit client-generated solutions and strategies

- Hold the client responsible and accountable

This process helps clients dramatically improve their outlook on work and life while improving their leadership skills and unlocking their potential. The SCP coaching process aligns with and is based on utilizing the eleven core competencies developed by the ICF, which identifies the skills and approaches used in professional coaching. These competencies are grouped into the following four categories, which the SCP team consistently employs: 1) Setting the Foundation, 2) Co-creating the Relationship, 3) Communicating Effectively, and 4) Facilitating Learning and Results.

5. Do you offer a structured coaching framework, or is it customized for each client?

We tailor our approach to each client organization. Depending on the parent organization's agreed-upon structure, individual coaches have some leeway to incorporate their coaching methods, philosophies, and assessments.

For each engagement, our client project team supports the specific engagement in several ways:

1. Identify the coaches that will fulfill the roster based on the client's criteria (i.e., ICF-certified coaches).
2. Develop a matching process that aligns with the client's needs.
3. Communicate with coaches once they have been selected.
4. Conduct a formal introduction to the coach and coachee.
5. Monthly track of the sessions completed by the coachee.
6. Provide monthly reporting to clients on coaching completions to accompany invoices.
7. Provide ongoing communication and support throughout the contract with the client and the SCP coaching community.

For the coaching interaction, SCP encourages our coaches to meet the client where they are and structure the coaching engagement according to the client's needs. The coachee and coach will complete a coaching engagement agreement for every engagement. This agreement aligns with the ICF framework and clarifies the coaching relationship.

6. How do you tailor your coaching to align with an organization's goals and culture?

Communication is critical in any successful project. It begins with the kickoff and includes monthly check-ins to ensure alignment.

Depending on the requirements, SCP can design a custom coaching or training package with the desired number of sessions, preferred assessments, or curriculum. If SCP is the sole requested bidder on the task order, we will schedule an intake meeting to understand the requirements better and respond to the task order. If the task order is competitive, SCP asks insightful questions to ensure our solution best matches the needs and any known budget.

SCP assigns a project manager to ensure logistics are handled, whether it is coach matching or scheduling training courses. Each project begins with a kickoff meeting. SCP will work directly with each client for the task order to ensure we create a process and timeline that will work for the organization and its participants.

From the kickoff meeting or start of the engagement, we will co-define communication, the structure of the program, and the matching process to ensure we align with Virginia Tech's objectives associated with executive coaching. During the kickoff meeting, the SCP team will ask for information about your current culture, strategic plan, and future direction. We will use this information to finalize our selection of coaches and our project plan for the engagement.

SCP recommends monthly meetings with Virginia Tech to ensure we are in lockstep with your organization's goals, challenges, and needs.

7. How do you measure the success of your coaching programs?

We evaluate each engagement in multiple ways:

- Monthly meeting for communication between SCP and Virginia Tech program management to ensure participants are scheduling and attending sessions, coaches are providing the expected services, and other potential issues.
- Coach and coachee check-ins midway through the engagement. Some prefer that we check in through the project manager, while others prefer to check in with the coachees.
- Survey at the end of the engagement to gauge client satisfaction and understand the engagement's success.

8. Do you provide one-on-one coaching, group coaching, or both?

SCP offers individual and group coaching opportunities.

<u>Individual coaching approach</u>

SCP understands that leaders in higher education need a broad range of leadership competencies. These competencies include the ability to think strategically, develop positive relationships, navigate change and conflict, and effectively communicate with and influence a variety of stakeholders, including but not limited to elected or government officials and governing boards; faculty, staff, and administration; and members of the local communities, alums, and industry partners. These competencies can be attained through coaching and training.

Virginia Tech needs coaches who will help participants in the targeted leadership competency areas of the Hokie Dozen and Leadership Excellence program. Through individual assessments, goal-setting, coaching sessions, feedback, and reflection. SCP's coaches will facilitate the creation of action planning and goal tracking and be available for ad hoc support and guidance based on the agreed scope of work for each engagement.

<u>Group coaching approach</u>

In addition to coaching, SCP offers more than 200 off-the-shelf or customizable courses that can be delivered virtually or onsite in a group setting. Our chief learning officer and instructional design team can tailor these courses to the university's needs. Our 2024-2025 course catalog is available on our website, www.yourstrategicconsultant.com.

Moreover, SCP's team members also include organizational resilience advisors who work to equip leaders with coping mechanisms in challenging times and prepare them for handling crises, which could consist of scenarios such as prolonged demonstrations, acts of violence, public relations issues, natural or other disasters, cyber threats, and more.

Our team also includes expertise in facilitating change management, guiding succession planning and leadership transitions, designing and orchestrating mentoring programs, and conducting organizational health and cultural studies.

9. What assessments or tools do you use in your coaching process (e.g., 360-degree feedback, personality assessments, etc.)?

Coaches in our network hold a broad range of certifications to support the breadth of assessments that the various colleges may require. Our coaches collectively support numerous individual and team assessment types including but not limited to the following: MBTI, CliftonStrengths, DISC, FIRO-B, TKI, EQI/EQI360, SDI, Hay Group EISC, CCL Benchmarks 360, OPM 360, TESI, 5 Behaviors of a Cohesive Team, Leadership Circle Profile, Leadership Circle Profile, Leadership Practices Inventory, Hogan, Pearman, Change Style Indicator (CSI), Decision Style Profile, Leadership Versatility Index (LVI), Leadership Circle Culture Survey (Team); Harrison, MBTI for Teams, Team Management Profile (TMP), Strong Interest Inventory, SkillScan, and Polarities.

Coach bios indicate each coach's certifications and Logistics & Pricing question 21 shows a pricing list for many common assessments.

Customization & Flexibility

10. How do you tailor coaching programs to meet the specific needs of individuals and organizations?

SCP can design a custom coaching or training package with the desired number of sessions, preferred assessments, or curriculum. If SCP is the sole requested bidder on the task order, we will schedule an intake meeting to understand the requirements better and respond to the task order. If the task order is competitive, SCP asks insightful questions to ensure our solution best matches the needs and any known budget.

11. How do you handle different leadership levels (executive, mid-level, emerging leaders)?

Leadership coaching applies to leaders at all levels, from new and emerging managers to experienced leaders. All coaching sessions will focus on strategic decision-making, building emotional intelligence, and achieving measurable results with achievable goals and progress tracking.

Executive Leaders:

High-ranking officials and administrators often have fewer peers to consult and more pressure. Senior leaders usually need the most experienced coaches, longer-term engagements, and a personalized approach focusing on critical thinking, developing long-term strategies, and making informed decisions aligning with the organization's goals. Developing a strong leadership presence is vital. This includes improving communication skills, building confidence, and enhancing the executive's ability to inspire and motivate others.

Mid-Level Leaders:

Coaching for mid-level leaders focuses on developing individual skills and team management capabilities. This includes enhancing communication, collaboration, and conflict resolution skills, improving operational efficiency and driving performance within their teams, navigating change, and implementing effective management practices.

Emerging Leaders

Emerging leaders require foundational leadership skills, including self-awareness, inclusivity, and social leadership. They also benefit from guidance and support as they transition into leadership roles, developing a clear understanding of their leadership style and potential and learning how to set clear and achievable goals and track progress toward them.

Emerging and mid-level managers often benefit from an overall leadership development program that incorporates individual coaching, classroom training, or assessment debriefs for teams such as DiSC, which provide insights into their communications and conflict styles and those of their team members. SCP can design a program to meet the specific needs of a cohort.

12. Are there any additional resources or support provided between coaching sessions?

Coaches use assessments, selected readings, reflective prompts, and tools in between sessions as assignments. They are also available to answer some questions via email.

Coach Selection & Matching Process

13. How do you match coaches with clients?

SCP carefully selects coaches to join our network based on certification, experience, and ongoing coaching success and satisfaction. SCP continually recruits and refreshes its list of coaches to ensure we offer a diverse slate of high-performing coaches.

We can match in several ways, depending on the organization and expectations. Some organizations prefer to enable a more self-directed approach to coach selection. In contrast, others prefer SCP to take a more hands-on approach to identifying a best-fit coach or a hybrid of the two methods.

Before coach matching begins, SCP collates a coaching roster, including bios with pictures, assessments, and other qualifications. This roster is presented to Virginia Tech to confirm the pool of coaches.

SCP has used all of the following options for coach matching:

Option 1 – Coach selection by participant with assignment by SCP

In this method, SCP provides a roster or list of coach bios and pictures from which coaches can select their top two to three preferred coaches. SCP attempts to assign the participants to their preferred coaches based on availability.

SCP may provide the roster as a PDF document or via an online system called Optify, which can also be used to manage the coaching sessions, assignments, and communications between the coach and coachee. This method works well for organizations that want more autonomy for the participants being coached or for a leadership cohort that selects coaches. If using Optify, the coach and coachee will engage through that platform; otherwise, SCP will introduce the coach and coachee via email. USDA Dairy used this method.

Option 2 – Coach matching by client program manager

SCP provides the roster to a client program manager who selects a coach for the participant. Alternatively, the client program manager shares some information with SCP regarding the coachee's needs and challenges, and SCP provides a limited list of coaches based on qualifications and criteria set by the prospective coachee. The program manager will confirm the assignment and send an email to introduce the coach and the leader and confirm logistics. This method works well for an organization where the client has a program manager familiar with the participants and their needs.

Option 3 – Coach matching by SCP

Participants may be asked to answer a brief survey or interview to help the SCP project manager recommend a best-fit coach. This method works well for organizations where participants being coached have little time to review and engage with the roster to make selections. The client program manager is not as familiar with the specific needs and challenges of the individuals to be coached. SCP sends the initial email to introduce the participants. This is NRC's preferred method.

In every case, once they have been matched, they both sign an agreement with the specific terms for their interactions. A sample coaching agreement has been provided in Appendix A.

14. Can clients choose or switch coaches if needed?

Yes. We encourage individuals being coached to meet at least three times. In our experience, the coach-coachee relationship requires minimal time to develop. If, after three sessions, the coachee wants to request a new coach, we will assign a new assignment.

15. What is the average experience level of your coaches?

All of our coaches have at least 10 years of industry experience with at least the minimum coaching hours required to achieve their level of ICF certification.

ACC - 100 hours of client coaching experience

PCC - 500 hours of client coaching experience

MCC - 2,500 hours of client coaching experience

16. Do your coaches have experience coaching leaders in higher education?

While SCP has never held a coaching contract in higher education, many of its coaches have earned advanced degrees, and some even work in higher education as adjunct professors, providing them with some insight into academia. SCP is finalizing a contract with the Virginia Community Colleges for similar coaching support, expanding our focus on identifying and cultivating coaches to serve our clients in higher education.

17. How do you handle situations where the coaching relationship isn't working?

As indicated in question 14, we encourage coachees to participate in three sessions before requesting a new coach. If a new coach is required, depending on the matching process, SCP will recommend a new coach, or the roster will be provided for selection by the project manager or client.

Logistics & Pricing

18. What is the typical duration of a coaching engagement?

6-12 sessions completed within a year.

19. How frequently do coaching sessions take place?

Either bi-monthly or monthly, depending on the client's request. Some of our clients prefer to offer a time duration of 6 months with up to 12 sessions, while others allow 9 or 12 months for the 12 sessions.

20. What are your pricing models (e.g., per session, retainer, project-based)?

We prefer to package at least six sessions with two agreed-upon assessments, with the ability to add additional sessions. Packages for six and nine sessions with two popular assessments are shown below.

SCP provides a variety of coaching packages that can be custom-designed for the client. Examples include:	
▪ **Six Month Coaching Program** – includes six coaching sessions and DiSC Assessment and project management	$3,090
▪ **Nine Month Coaching Program** – includes nine coaching sessions, DiSC and 360 assessment and project management	$4,815
▪ SCP's coaches use a variety of **assessments** to support coaching. Each assessment has its own utility.	See a complete list of assessment and their respective prices in the additional table provided under question 21.

Add-on rates for coaching sessions (including prep and follow-up time are included below.

Coaching Session (per session)	$325-$450/hour session; Higher rate includes 15 minutes prep time.			
		ICF ACC	**ICF PCC**	**ICF MCC**
	In Session Coach Time	$ 325.00	$ 350.00	$ 360.00
	Coach Prep Time	$ 81.25	$ 87.50	$ 90.00
	Fully Loaded Rate/Hour	$ 406.25	$ 437.50	$ 450.00
Debriefs and/or exit summaries	$325-$450/hour (as agreed based on requirements)			

21. Are there any additional costs, such as assessment fees or materials?

If not negotiated as part of a package rate, assessments are priced separately using the following menu of assessments:

- SCP will use current market rates for assessments and pass through the costs. Costs are representative as of 4/9/2024 but are subject to change.
- If we have a certified coach, but the coach needs to provide the current pricing, it is TBD.

Assessment	Cost
MBTI	
MBTI® Complete (Form M/Step I™) 161001	$59.95
MBTI® Profile (Form Q/Step II™) 267147	$45.95
MBTI® Interpretive Report (Form Q/Step II™) 26714	$65.95
Strong Interest Inventory® Interpretive Report 284104	$18.95
FIRO-B	$49.95
EQi 2.0:	
Workplace	$76.00
Leadership	$114.00
Group Report	$282.00
EQi 360:	
Workplace	$278.00
Leadership	$358.00
Benchmarks 360 (CCL)	
Execs	$425
Managers	$385
Learning Agility	$125
TESI (Team Emotional & Social Intelligence)	$800*
Leadership Practices Inventory	$300

The Leadership Circle 360	$500
360 Grow Leaders	$375
DISC:	
Workplace Productive Conflict	$120.00
Agile EQ	$150.00
Management	$150.00
Sales Profile	$150.00
Work of Leaders	$150.00
Facilitator Report	$150.00
Group Culture Report	$150.00
5 Behaviors: Personal Dev.	$150.00
5 Behaviors: Team Dev.	$150.00
TKI (Note: This cost is based on TKI Profile and Interpretive Report--248248)	$26.95
Hogan Assessments (for the leadership suite)	$425.00
SDI:	
Assessment	$140.00
Training	$140.00
StrengthsFinder:	
Clifton Strengths 5	$24.99
Clifton Strengths 34	$59.99
For Managers	$49.99
Leadership Circle Profile	$300
Clark-Wilson	TBD
The Workplace Big 5	$29

Results & ROI Measurement

22. How do you track and report progress for individuals and organizations?

SCP tailors individual coaching or cohort programs depending on the engagement goals. SCP has focused coaching on individual growth and developing actionable steps toward organizational goals. Generally, this progress is between the coach and the individual being coached unless the coaching goals stipulate otherwise in the task order and coaching agreement.

SCP tracks and reports monthly on progress (i.e., coaching sessions completed, assessments taken) and burndown on allotted hours. For longer engagements, SCP will hold check-in meetings and ensure risks are addressed, such as the inability to schedule, requests to switch coaches, etc.

23. Can you share examples of measurable improvements achieved by your clients?

When our federal clients have worked with us on multiple organizational development programs, including coaching, the organizations have seen improvements to their Federal Employee Viewpoint Survey (FEVS) results, a key indicator of organizational health. USDA Dairy Program has seen at least a 20% increase in FEVS scores.

24. What role does feedback play in your coaching process?

Feedback plays a crucial role in the coaching process. Optimally, feedback should be objective, honest, timely, and thoughtful, considering how people receive criticism and praise. Honest and fair feedback should help clients improve by focusing on specific behaviors and outcomes rather than personal characteristics. This approach ensures that feedback is constructive and actionable. Techniques like the "sandwich" method (positive feedback, corrective feedback, positive feedback) can effectively encourage learning and improvement. Regular feedback helps maintain momentum in the coaching relationship. Feedback should also be timely and thoughtful, addressing specific situations and behaviors to help clients understand the impact of their actions and make necessary adjustments. Feedback is not just about pointing out shortcomings but also about recognizing what clients do well. This balanced approach helps clients feel valued and motivated to improve. Effective feedback empowers clients, encourages self-discovery and self-directed action, and fosters an environment that allows clients to feel safe and supported as they work towards their goals. Coaches may use tools such as 360 reviews to provide objective feedback.

25. Do you provide post-coaching follow-ups or ongoing development support?

Coaches may recommend selected readings, exercises, reflective prompts, or other assignments between sessions. They are also available to answer some questions via email.

Case Study: Leadership Development for Academic Department Chairs

Client: Mid-Sized University – Department of Sociology

Background: Dr. Alex Carter, an experienced faculty member, was recently appointed Chair of the Department of Sociology. Despite their academic expertise, they had no prior formal leadership experience. Faced with the challenges of managing faculty, overseeing budgets, resolving conflicts, and representing the department in university-wide initiatives, Dr. Carter sought leadership coaching to develop essential skills and confidence in their new role.

Challenges Identified:

- *Lack of prior leadership experience leading to uncertainty in decision-making.*
- *Difficulty in faculty engagement and team building.*
- *Inefficiencies in time management and delegation.*
- *Limited experience in strategic planning and conflict resolution.*
- *Need to foster a cohesive and positive departmental culture.*

Please provide a plan for resolving the challenges identified above along with lump sum pricing for this endeavor.

Overall Approach. The approach will rely heavily on the Socratic coaching method, asking questions, supporting the client in uncovering possibilities and potential action steps, and facilitating client decision-making. Supplement this approach with data and potential resources, which can help identify specific issues for resolution and tools that may be useful in addressing identified gaps.

Dr. Alex Carter's case is an excellent opportunity for leadership coaching with a tailored approach that builds confidence, develops skills, and fosters growth. Working collaboratively with Dr. Carter, SCP suggests that we structure the coaching in Phases to support the growth and development of needed skills.

Phase 1: Establishing Foundation

Initial Exploration (3 sessions).

- Work with the client to identify what success looks like for him in this new role. Encourage the client to be specific in identifying outcomes, behaviors, feelings, and perceptions of success. Ask the client to take the perspective of the following stakeholders to identify what their success looks like to each of these stakeholders:
    - University leadership
    - Colleagues in other departments
    - Faculty in the Department of Sociology
    - Support staff in the department
    - Students taking courses in the department
- Ask the client to identify what behaviors, attitudes, skills, and approaches are required to achieve this success. Invite the client to take a personal inventory and identify those attitudes, behaviors, skills, and approaches missing from their "repertoire." How do they feel about the situation, and what about them needs to change?
- One session could be devoted to the feedback on the 360 assessment (see below). Comparing client insights with interview feedback will be helpful in identifying potential opportunities for positive change.
- This exploration could result in a list of issues to be worked on throughout the remainder of the coaching engagement and identifying external resources/skill development (e.g., budget training).

Outcome of Phase 1:

1. **Clarify Leadership Values and Vision**: Assist Dr. Carter in defining their core values and vision for the department, forming the backbone of their leadership style.
2. **Self-Assessment with Tools**: Utilize the **DiSC personality assessment** to understand Dr. Carter's communication preferences and behavioral tendencies. Pair this with a **360-degree evaluation** to collect feedback from colleagues, faculty, and staff for a comprehensive understanding of strengths and areas for improvement.

Recommended Resource (30 minutes per interview x 12 interviews + 3 hours of prep/analysis). Although not required, clients often benefit from the data contained in a 360 assessment. In this case, an interview-type 360 is recommended with select members of the same stakeholder groups identified above. The questions in the assessment would mirror the client's questions, emphasizing the client's behaviors and their impact on the relationship with the stakeholder and the organization's success.

3. **Goal Setting**: Develop SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound) to provide clear objectives for their leadership growth.

Phases 2-4: Coaching Sessions (6-9 sessions). All coaching sessions will be client-driven. The client determines the agenda for each session and the desired outcome. The agenda could be driven by the specific issues identified through the exploration phase or could be an unrelated topic. Often, clients choose to examine a situation in which they were involved, intending to identify lessons, debate alternate approaches, etc. Clients may also consider using coaching sessions as opportunities to rehearse key engagements. Regardless of the agenda item, coaching sessions will focus on the identification of an issue, intended outcome, exploration of the issue, in particular the client's feelings/assessment of his/herself regarding the issue, brainstorming options to make positive change, and the invitation to the client to "experiment" with a potential change of attitude/behavior. The invitation will include suggestions for assessing the success of the "experiment" while considering the intended outcome. This "formulaic" approach will be modified based on the needs/desires of the client.

Phase 2: Building Core Skills (2-3 sessions)

1. **Decision-Making Frameworks**: To tackle uncertainty in decision-making, equip Dr. Carter with practical tools like pros-and-cons analysis and priority matrices.
2. **Faculty Engagement**: Foster trust and collaboration by establishing open communication channels, recognizing faculty achievements, and organizing team-building initiatives.
3. **Time Management and Delegation**: Teach strategies such as Eisenhower's Matrix for task prioritization and effective delegation techniques that empower faculty members.

Phase 3: Strategic Planning and Problem Solving

1. **Budget and Strategic Planning Skills**: Identify tools to support budget management fundamentals and introduce strategic planning methods like PESTLE analysis for a broader understanding of departmental initiatives.
2. **Conflict Resolution**: Offer guidance on conflict resolution strategies, including active listening, empathy, and finding "win-win" solutions to address faculty disagreements effectively.
3. **Leadership Development Plan**: Create a roadmap for continuous growth through leadership workshops, mentorship opportunities, and networking.

Phase 4: Fostering Positive Departmental Culture (2-3 sessions)

1. **Building Cohesion**: Develop shared values and foster inclusivity via department-wide initiatives such as town halls and feedback sessions.
2. **Modeling Growth Mindset**: Encourage a learning-focused culture by demonstrating resilience, accountability, and optimism.
3. **Celebrate Successes**: Establish regular opportunities to recognize and celebrate departmental achievements and milestones, promoting positivity and pride.

Continuous Reflection and Feedback

Schedule regular evaluations of Dr. Carter's progress, adapt coaching methods as needed, and provide constructive feedback to reinforce growth. Encourage ongoing self-reflection to deepen resilience and understanding.

This comprehensive plan empowers Dr. Carter to overcome challenges, build confidence, and effectively lead the Department of Sociology.

Pricing

For this engagement, SCP will assume the assignment of a PCC ICF coach with a rate of $437.50 for a fully loaded hourly rate. Interviews with stakeholders is a recommended but optional step in this proposed solution.

Item	Quantity	Cost
Phase 1: Exploration		
Coaching Sessions	3	$ 1,312.50
Interviews with stakeholders & analysis (Optional)	7	$ 3,062.50
360 Assessment	375	$ 375.00
DiSC Assessment	150	$ 150.00
Phase 2-4: Coaching for Outcomes		
Coaching Sessions	9	$ 3,937.50
Total with 360 stakeholder interviews		$ 8,837.50
Total without 360 stakeholder interviews		$ 5,775.00

Procurement Standard Negotiation Questions

1. **Virginia Tech Question: As part of Virginia Tech standard procedures, all awarded contracts will be publicly posted on an online contracts portal. Is there any information included that would be used to identify or harm a person's identity, finances, or personal information? If so, please provide a redacted copy of your proposal.**

   JAMA Enterprises, Inc Response: No

2. **Virginia Tech Question: End of Contract Service Transition Expectations: If or when a transition of service to another provider is required (end of contract life or otherwise), the university would require the incumbent firm to cooperate fully in a successful transition of services. Explain any requirements your firm might have in preparing for such a transition of services. Additionally, please indicate your willingness to establish a transition plan alongside the new provider of service, which may include but not be limited to sharing important data and/or existing service information via a cooperative knowledge transfer process.**

   JAMA Enterprises, Inc Response:

Each coaching engagement is confidential. If applicable, notes and assessment results will be released to an individual being coached to share with the new coach.

Any expectations for sharing coaching information with the employer or manager should be outlined in the task order and disclosed to the individual being coached as part of a coaching agreement.

An appendix includes a sample coaching agreement. This can be modified to meet the specific needs of each coaching engagement.

SCP will cooperate with any new service provider to transfer data as long as it does not violate any agreements for the expected privacy of confidential or personal data.

3. **Virginia Tech Question: Cost to the University is a major component of this solicitation and one of the 5 factors considered during the award process. With this in mind, please submit your best and final pricing for consideration.**

Please see the table in questions 20 and 21 for our costs.

4. **Virginia Tech Question: Does your company agree to provide monthly invoices with payment due thirty (30) days after receipt of invoice or goods/services, whichever is later?**

Yes

5. **Virginia Tech Question: If awarded a contract, do you agree to limit price increases to no more than the increase in the Consumer Price Index, CPI-W, for the latest twelve (12) months for which statistics are available at the time of renewal or 3 percent, whichever is less?**

Yes

6. **Virginia Tech Question: If awarded a contract, are you willing to hold prices firm for the initial contract period?**

Yes, assuming the initial contract period is one year.

7. **Virginia Tech Question: Are you registered with and willing to participate in the eVA internet procurement solution described in the terms and conditions of the RFP?**

Yes. SCP is registered in eVA and will participate in the required procurement solution.

8. **Virginia Tech Question: Are the prices for all goods/services listed in your proposal inclusive of all applicable eVA system transaction fees?**

Yes

9. **Virginia Tech Question: Will your company agree to participate in the Wells One AP Control Payment System?**

Yes

10. **Virginia Tech Question: Do you agree that the initial contract period shall be 1 year?**

Yes

11. **Virginia Tech Question: Upon completion of the initial contract period, does your company agree that the contract may be renewed by Virginia Tech upon written agreement of both parties for (4) four one-year periods, under the terms of the current contract?**

Yes

12. **Virginia Tech Question: Prior to renewal does your company agree to revaluated pricing to be sure Virginia Tech is receiving the best possible discount or rate structure your company can provide?**

Yes

13. Virginia Tech Question: How soon after contract award can you begin providing services?

Within 2 business days

14. Virginia Tech Question: Do you acknowledge, agree and understand that your contract is not exclusive, and that Virginia Tech cannot guarantee a minimum amount of business if a contract is awarded to your company?

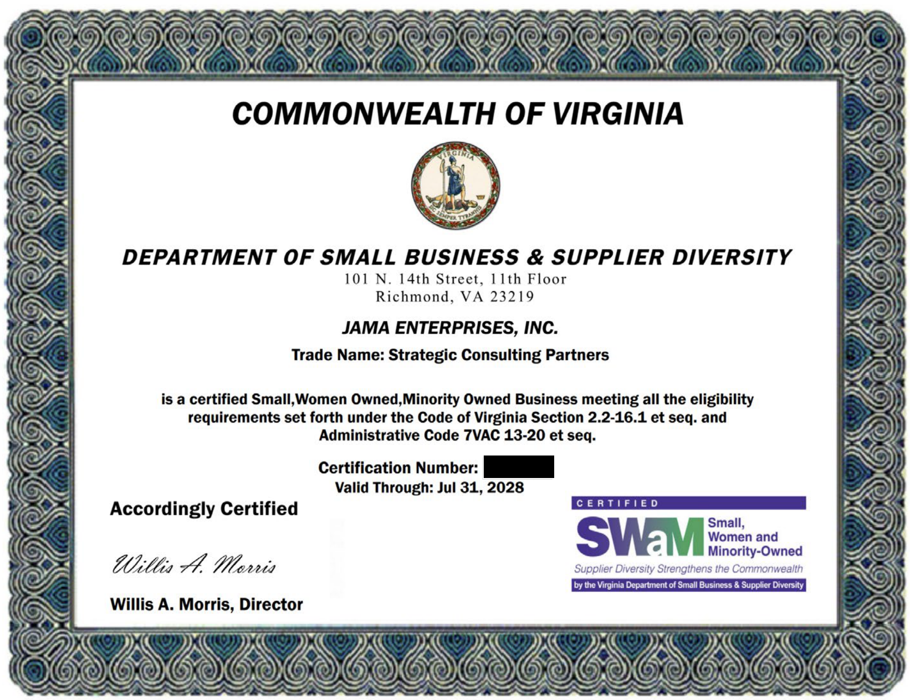
Yes

15. Virginia Tech Question: Does the vendor acknowledge, agree, and understand that the terms and conditions of the RFP # 71412503 shall govern the contract if a contract is awarded to your company?

Yes

16. Virginia Tech Question: Do you agree to become a certified SWaM vendor with the Virginia Department of Small Business and Supplier Diversity and maintain that certification throughout the term of this contract?

Yes



COMMONWEALTH OF VIRGINIA

DEPARTMENT OF SMALL BUSINESS & SUPPLIER DIVERSITY

101 N. 14th Street, 11th Floor
Richmond, VA 23219

JAMA ENTERPRISES, INC.

Trade Name: Strategic Consulting Partners

is a certified Small,Women Owned,Minority Owned Business meeting all the eligibility requirements set forth under the Code of Virginia Section 2.2-16.1 et seq. and Administrative Code 7VAC 13-20 et seq.

Certification Number: [redacted]
Valid Through: Jul 31, 2028

Accordingly Certified

Willis A. Morris

Willis A. Morris, Director

CERTIFIED
SWaM Small, Women and Minority-Owned
Supplier Diversity Strengthens the Commonwealth
by the Virginia Department of Small Business & Supplier Diversity

17. Virginia Tech Question: Please submit a W-9 on the current IRS Form Revision, and a copy of your Certificate of Insurance that meets the requirements of the solicitation.

SCP is presenting certificates of insurance that meet or exceed the requested standards, aside from the Builder's Risk, which we ask to be waived. Please see the attachments for the W-9 and Certificate of Insurance in the appendix.

Virginia Tech Response: The Builder's Risk is not applicable to these services. This is boilerplate language that is included in our terms.

Appendix A – Coaching Agreement

STRATEGIC CONSULTING PARTNERS
JAMA ENTERPRISES INC

EXECUTIVE COACHING AGREEMENT

Coach Information	Logistics	Client Information
Name: ___________________	Number of Sessions: 6	Name:
Email: ___________________	Term: 6-9 months	Email:
Phone: ____________(work)	Session Day: _________________	Phone: ______________ (work)
___________________ (cell)	Session Time: ________________	_______________ (cell)

Description of Coaching Services

Coaching is an ongoing, confidential, one-on-one partnership between a client and a coach to identify, prioritize, and achieve the client's desired goals. Coaching is not advising, counseling, consultation, or mentoring. Rather, coaching may address specific business, organizational, or career issues, personal projects, or general conditions in the client's life or profession. The coaching engagement aims to help maximize the client's potential and enhance his/her personal and professional effectiveness.

The scope of services will be decided jointly by the client and coach. It may include assessments, dialoguing, brainstorming, clarifying values and goals, identifying courses of action, examining assumptions and habits, asking clarifying questions, making empowerment requests, and creating accountability for the client's goals and objectives. The client is responsible for deciding how to handle situations discussed during coaching and implementing choices and options derived from the coaching engagement.

Coaching Relationship

The coaching relationship will be based on mutual trust and respect. The coach is committed to working with the client to produce the desired outcomes that work best for the client. The coach will engage in direct and professional conversations throughout the coaching relationship. The client can expect the coach to be honest and straightforward in asking questions, making requests, and providing feedback. The client understands that the power of the coaching relationship is granted by the client and agrees to have an effective coaching relationship. If the client wants to redefine this agreement at any time, he/she should inform the coach and share the desired modifications.

Confidentiality

The coach will abide by the International Coach Federation (ICF) Standards of Ethical Conduct. The coach promises that all information discussed during coaching sessions or as part of the coaching relationship is and will remain strictly confidential. To maintain the coach's credentials, the client agrees that the coach may provide his or her name, email/telephone number, and dates of the coaching engagement to the ICF for validation. No information other than the above information will be reported, revealed, or requested. The client is free to share whatever he/she chooses from these engagements with anyone. Additional information about ICF confidentiality is available at *coachfederation.org/ethics*.

Coaching Sessions

This coaching program is short-term and goal-oriented. Regular interaction between the client and the coach is required to sustain the momentum effectively.

All coaching sessions will be conducted by telephone or Zoom (or via another video conferencing platform) and begin and end on time. The coach and client agree to notify one another by e-mail or telephone at least 24 hours in advance if they need to reschedule the session.

At the end of each coaching session, the coach and client will confirm the date and time of the next coaching session. Time permitting, the coach will be available for impromptu coaching between sessions should the need arise for the client.

Coaching can continue after the contracted period based on mutual agreement between the coach and client, with specific terms (frequency, method, means, and duration) to be agreed upon at that time.

The signatures below indicate our full understanding of and agreement with the information above.

Signatures:

I have read and agree to the above.

____ ______________

Client's Signature Date

____ ______________

Coach's Signature Date

Coaching Commitments and Responsibilities
These policies and procedures establish the standards and boundaries of our relationship. They define your responsibilities and my commitments to you as your coach. Please take the time to review them.

Client Responsibilities:

- **Provide 24-hour advance notice to reschedule an appointment**. I understand things that come up infrequently that may require your attention, and I'm flexible in scheduling to accommodate your needs. At least 24 hours of advance notice for rescheduling allows me to make time available to others and to ensure that we have time to commit to each session.
- **Choose a quiet, private place for our appointments** where you can concentrate on yourself, free of distractions or interruptions.
- **Come to our appointment prepared**, clear about what you want to get from the session, and ready to give your best. Identify your primary focus area(s), and commit to learn more about and to take action in these area(s). Be candid and courageous with yourself and me, stretching and challenging yourself, while enjoying the process.

As Your Coach:

- **I will be present and available** for you when you call at your scheduled time. I will listen to you deeply and share with you my observations and insights. Most importantly, I will draw out your best thinking and the solutions that live within you.
- **I will be unconditionally constructive and supportive.** My only agenda is your success and well-being.
- **I will speak the truth as I see it to you.** You may not always agree with me, and I can count on you to tell me when those times happen.
- **I will provide the materials, resources, and tools** needed for our coaching relationship. I will send you the materials you need or tell you where you can find them, and I will be clear about when I am consulting versus coaching.
- **I am available to you between scheduled sessions.** I encourage you to call or e-mail when you have a challenge you would like to work through or when you want to share a success.
- **I will keep our sessions confidential** and not share anything we discuss without your permission.
- **I will bring a spirit of curiosity to our coaching sessions.** I will be inquisitive and curious about you and what you share with me. As your coach, I will not judge you but instead foster a safe environment where you can be yourself. I will share my intuition and reflect on your spoken and unspoken messages.
- **My goal is to forward the action and build momentum** by ensuring you leave each coaching session with much greater clarity, power, and readiness to act.

Appendix B – CPAR for NRC

The performance report for SCP’s work with the NRC has been included on the following pages.

Print Close

FOR OFFICIAL USE ONLY / SOURCE SELECTION INFORMATION - SEE FAR 2.101, 3.104, AND 42.1503

CONTRACTOR PERFORMANCE ASSESSMENT REPORT (CPAR)

Nonsystems

Name/Address of Contractor:

Vendor Name: JAMA ENTERPRISES, INC.

Division Name:

Street: 836 TAMANINI WAY

City: MECHANICSBURG

State: PA Zip: 170557801

Country: USA

CAGE Code: 4ASK8

Unique Entity ID (SAM): YHS6U4FL1WL5

Product/Service Code: R431 Principal NAICS Code: 541612

Evaluation Type: Interim

Contract Percent Complete:

Period of Performance Being Assessed: 07/01/2021 - 06/30/2022

Contract Number: 31310019D0003 31310019F0074 **Business Sector & Sub-Sector:** Nonsystems - Prof/Tech/Mng Support

Contracting Office: NUCLEAR REGULATORY COMMISSION **Contracting Officer:** JENNIFER DUDEK **Phone Number:** 301-415-2257

Location of Work:

Date Signed: 06/28/2019 **Period of Performance Start Date:** 06/28/2019

Est. Ultimate Completion Date/Last Date to Order: 06/30/2024 **Estimated/Actual Completion Date:**

Funding Office ID: 313100

Base and All Options Value : $2,289,287 **Action Obligation:** $855,120

Complexity: Medium **Termination Type:** None

Extent Competed: Not Available for Competition **Type of Contract:** Time and Materials

Key Subcontractors and Effort Performed:

Unique Entity ID (SAM):

Effort:

Unique Entity ID (SAM):

Effort:

Unique Entity ID (SAM):

Effort:

Project Number:

Project Title:

Organizational Development (OD) Services for the U. S. Nuclear Regulatory Commission (NRC)

Contract Effort Description:

The specific objective of this task order is to provide OD services that supplement NRC's Office of the Chief Human Capital Officer's resources, through executive coaching and OD interventions.

FOR OFFICIAL USE ONLY

Small Business Subcontracting:

Does this contract include a subcontracting plan? No

Date of last Individual Subcontracting Report (ISR) / Summary Subcontracting Report (SSR): N/A

Evaluation Areas	Past Rating	Rating
Quality:	Very Good	Very Good
Schedule:	Very Good	Very Good
Cost Control:	Very Good	Very Good
Management:	Very Good	Exceptional
Small Business Subcontracting:	N/A	N/A
Regulatory Compliance:	Very Good	Exceptional
Other Areas:		
(1) N/A:		N/A
(2) N/A:		N/A
(3) N/A:		N/A

Variance (Contract to Date):

Current Cost Variance (%): Variance at Completion (%):

Current Schedule Variance (%):

Assessing Official Comments:

QUALITY: Credible senior consultants that bring a diversity of expertise in change management, organizational development, executive coaching, performance management, emotional intelligence, conflict resolution, etc. Many of our senior leaders have expressed satisfaction with the coaches they have been assigned and some have requested to have their executive coaching extended.

SCHEDULE: Task orders have all been completed on schedule. Strategic Consulting Partners (SCP) Senior Organizational Development consultants adjusted their presentation in real time to provide on-scheduled delivery of OD services.

COST CONTROL: Cost are within negotiated rates and hours expended are reasonable.

MANAGEMENT: Program Sponsor/Manager has been responsive in coordinating necessary services over multiple task orders with prime and subcontractor suppliers. Specific interventions this year required SCP to go above and beyond to support unusually difficult situations. With patience, skill, and tact, SCP analyzed the OD needs of our clients and provided useful and practical tools that enhanced the engagement activity and moved situations forward in a most helpful manner. In each case, all task orders have been fulfilled. Customer survey data and verbal feedback has been collected, analyzed and incorporated to continuously improve service delivery and customize solutions specific to the needs of this organization.

REGULATORY COMPLIANCE: All regulatory requirements have been met. The executive orders mandating vaccination of federal employees and those business whom the government contracts with has put additional burden on conducting all acquisitions, but SCP readily came into compliance and efficiently satisfied reporting vaccination status.
Invoices are kept exceptionally well and provide detailed, accurate accounting. We

appreciate all the consideration that SCP applies to ensure proper compliance with acquisition regulations.

RECOMMENDATION:

Given what I know today about the contractor's ability to perform in accordance with this contract or order's most significant requirements, I would recommend them for similar requirements in the future.

Name and Title of Assessing Official:

Name: Allan Jason Lising

Title: Contracting Officer Representative

Organization: U.S. Nuclear Regulatory Commission

Phone Number: 301-287-056 Email Address: jason.lising@nrc.gov

Date: 10/06/2022

Contractor Comments:

ADDITIONAL/OTHER: The evaluation was delivered/received by the contractor on 10/06/2022. The contractor neither signed nor offered comment in response to this evaluation.

Name and Title of Contractor Representative:

Name:

Title:

Phone Number: Email Address:

Date: 12/06/2022

Review by Reviewing Official:

Review by Reviewing Official not required.

Name and Title of Reviewing Official:

Name:

Title:

Organization:

Phone Number: Email Address:

Date:

Appendix C – W-9

SCP's W-9 has been included on the following page.

Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give form to the requester. Do not send to the IRS.

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See *Specific Instructions* on page 3.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

JAMA Enterprises, Inc.

2 Business name/disregarded entity name, if different from above.

dba Strategic Consulting Partners

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☑ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . ______

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ______

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . ☐

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) ______

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) ______

(Applies to accounts maintained outside the United States.)

5 Address (number, street, and apt. or suite no.). See instructions.

836 Tamanini Way

6 City, state, and ZIP code

Mechanicsburg, PA 17055

Requester's name and address (optional)

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

☐☐☐ - ☐☐ - ☐☐☐☐

or

[redacted]

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here **Signature of U.S. person** Monica A. Gould **Date** 7/1/2024

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don’t return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);

2. Certify that you are not subject to backup withholding; or

3. Claim exemption from backup withholding if you are a U.S. exempt payee; and

4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and

5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester’s form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.

2. The treaty article addressing the income.

3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.

4. The type and amount of income that qualifies for the exemption from tax.

5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called “backup withholding.” Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;

2. You do not certify your TIN when required (see the instructions for Part II for details);

3. The IRS tells the requester that you furnished an incorrect TIN;

4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or

5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under “*By signing the filled-out form*” above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of $50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a $500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

• **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

• **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or "doing business as" (DBA) name on line 2.

• **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

• **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

• **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner's name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or • Sole proprietorship	Individual/sole proprietor.
• LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

• Generally, individuals (including sole proprietors) are not exempt from backup withholding.

• Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.

• Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.

• Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

2—The United States or any of its agencies or instrumentalities.

3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.

5—A corporation.

6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.

7—A futures commission merchant registered with the Commodity Futures Trading Commission.

8—A real estate investment trust.

9—An entity registered at all times during the tax year under the Investment Company Act of 1940.

10—A common trust fund operated by a bank under section 584(a).

11—A financial institution as defined under section 581.

12—A middleman known in the investment community as a nominee or custodian.

13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over $600 required to be reported and direct sales over $5,000[1]	Generally, exempt payees 1 through 5.[2]
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

[1] See Form 1099-MISC, Miscellaneous Information, and its instructions.

[2] However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at *www.SSA.gov*. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at *www.irs.gov/EIN*. Go to *www.irs.gov/Forms* to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to *www.irs.gov/OrderForms* to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account[1]
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor[2]
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee[1]
b. So-called trust account that is not a legal or valid trust under state law	The actual owner[1]
6. Sole proprietorship or disregarded entity owned by an individual	The owner[3]
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity[4]
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

[1] List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

[2] Circle the minor's name and furnish the minor's SSN.

[3] You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

[4] List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes. Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to *phishing@irs.gov*. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at *spam@uce.gov* or report them at *www.ftc.gov/complaint*. You can contact the FTC at *www.ftc.gov/idtheft* or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see *www.IdentityTheft.gov* and Pub. 5027.

Go to *www.irs.gov/IdentityTheft* to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.

Appendix D – Certificates of Insurance

Certificates of Insurance have been included on the following pages.

ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

[redacted]

Docusign Envelope ID: 5A325E92-AA6F-4E25-A6D5-DF2F3E9550C4

ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

[redacted]