

COMMONWEALTH OF VIRGINIA

STANDARD CONTRACT

Contract Number: VTS-2788-2025

This contract entered into this 8th day of May 2025 by PRM Consulting, Inc 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:

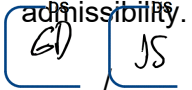
SCOPE OF CONTRACT: The Contractor shall provide Leadership Coaching to Virginia Tech as set forth in the Contract Documents.

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

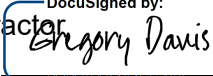
COMPENSATION AND METHOD OF PAYMENT: The Contractor shall be paid by Virginia Tech in accordance with the Contract Documents.

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 15, 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.


(Initials)

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

DocuSigned by:
Contractor
By: 

(Signature)
Gregory Davis Managing Principal

Name and Title

DocuSigned by:
Virginia Tech
By: 

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.scquest.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 SBSB 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:

<u>Criteria</u>	<u>Maximum Point Value</u>
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.scquest.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, including but not limited to claims under the Worker's Compensation Act. 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 an 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: Virginia 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.



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
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.



*PRM Consulting, Inc.
Technical Proposal Response
RFP Bid # 71412503
To Provide
Leadership Coaching for Virginia Tech (VT)
Due Date: December 16, 2024; 3:00 PM*

PREPARED FOR



SUBMITTED BY:
PRM Consulting, Inc.
1814 13th Street, NW
Washington, DC 20009
Telephone: 202-745-3700
www.prmconsulting.com



Table of Contents

COVER LETTER.....	1
SPECIFIC REQUIREMENTS	4
VI. Understanding the Statement of Needs	4
VII.A.1. Experience in Leadership Coaching in Higher Education	4
<i>VII.A.1 Experience With VT and the Higher Education Industry</i>	<i>5</i>
<i>VII.A.1 Coaching Methodologies and Approaches</i>	<i>5</i>
VII.A.1 Ability To Meet Deadlines	7
VII.A.1 Confidentiality	7
VII.A.2. Overview of the Coaches' Qualifications	8
<i>VII.A.2 Knowledge and Application of Coaching Competencies</i>	<i>8</i>
<i>VII.A.2 Ability To Provide Qualified Coaches</i>	<i>8</i>
<i>VII.A.2 Application of Coaching Competencies Towards VT's Hokie Dozen</i>	<i>11</i>
VII.A.3. Detailed Description of the Approach to be Taken	12
<i>VII.A.3 Proposed Approach</i>	<i>13</i>
<i>VII.A.3 Proposed Activities / Coaching Plan</i>	<i>14</i>
<i>VII.A.3 One-on-One leadership Coaching</i>	<i>14</i>
<i>VII.A.3 Group / Team Coaching</i>	<i>15</i>
<i>VII.A.3 Recommended Assessments and Inquiry Questionnaires</i>	<i>18</i>
<i>VII.A.3 Proposed Deliverables, Milestones and Frequencies</i>	<i>20</i>
VII.A.4. Detailed Breakdown of Pricing.....	23
VII.A.5. Three References	25
VII.A.6. Participation of SWOB and SWaM	28
VII.A.7. Submission Instruction page and addenda	29
Appendices	30
RESUMES	30
COACHING TOOL SAMPLE.....	1
EXECUTIVE COACHING INFORMATION SHEET	1
COACH SELECTION FORM.....	2
ADDENDUMS	1



COVER LETTER

RFP Title: Executive Coaching Services - Bid Number: 71412503

Thank you for the opportunity to present a proposal describing how PRM Consulting, Inc. can partner with Virginia Polytechnic Institute and State University (Virginia Tech) to provide Virginia Tech (VT) high quality leadership coaching services and leadership development initiatives.

PRM Consulting, Inc. is a full-service human resource consulting firm and has been in business for over twenty (20) years. For this engagement, we are partnering with Thomas Management Consulting ("PRM TEAM"), a SWaM certified (Certificate #: 712743), Woman Owned Small Business Enterprise that specializes in executive and leadership coaching, and that we have successfully worked with on similar engagements with highly rated client satisfaction for ten (10) years. Both members of the PRM Team are registered in the System for Award Management (SAM). We are confident this combination of a 100% minority owned business enterprise, and 100% woman owned small business represents a unique benefit to VT.

The PRM Team's approach to managing and delivering the technical aspects of this project is organized and presented to closely follow instructions and the guidelines provided in *Section VI Statement of Needs* and *Section VII Proposal Preparation and Submission* in your *Leadership Coaching Request for Proposal (RFP) and Addendums*. In our response, we describe our team's proposed structure and the critical capabilities that we bring to this effort. Furthermore, the PRM Team has included responses that highlight the prior experience that positions our team for success on this initiative. See Compliance Matrix below.

	VT Leadership Coaching Services Compliance Matrix	
RFP Reference	RFP Requirement	Proposal Location
VI.1 - 5	Understanding VT's Statement of Needs	VI Understanding Statement of Needs
VII.A.1	Provide a brief discussion of organization including experience in leadership coaching with other higher educational institutions.	VII.A.1. Experience In Leadership Coaching in Higher Education

VIRGINIA TECH (VT)

RFP Title: Leadership Coaching Services Bid Number: 71412503

Page | 1



VT Leadership Coaching Services Compliance Matrix		
RFP Reference	RFP Requirement	Proposal Location
VII.A.2	Provide overview of the coaches' qualifications, certificates and expertise in leadership coaching.	VII.A.2. Overview Of the Coaches' Qualifications
VII.A.3	Provide a detailed description of the approach to be taken for individual and group coaching.	VII.A.3. Detailed Description of The Approach to Be Taken
VII.A.4	Clearly break down pricing for individual coaching, group coaching, workshops, assessments and any other relevant services.	VII.A.4. Detailed Breakdown of Pricing
VII.A.5	Provide at least three references from previous clients who have engaged in similar leadership coaching services	VII.A.5. Three References
VII.A.6	Participation of Small, Women-owned and Minority-owned Business (SWaM) Business.	VII.A.6. Participation Of SWOB And SWaM
VII.A.7	Return the Submission Instruction page and addenda, if any, signed and filled out as required.	VII.A.7. Submission Instruction Page and Addenda. PRM acknowledges receipt of Addendum 1.pdf and Addendum 2.pdf.

PRM has included a signed and dated Submission Instruction Page and acknowledges receipt of Addendum 1.pdf and Addendum 2.pdf as directed in RFP Section VII Proposal Preparation and Submission.

In response to Addendum 1.pdf Question 54 regarding Cooperative Procurement Agreements within the state of Virginia, and the corresponding 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.", PRM is pleased to inform Virginia Tech that it has awards ([VCU BPA, RFP#: 175357155CK, MSA#: C0003898] and [UVA-AGR-SVC-00042]) that qualify as a VA Cooperative Procurement Agreement. PRM is positioned to provide services under those awards immediately.

PRM warrants and assures VT that it has adequate revenues, subject matter expertise and consultants with the prerequisite experience to support the engagement requirements. Additionally, PRM has more than adequate financial capabilities,

VIRGINIA TECH (VT)

RFP Title: Leadership Coaching Services Bid Number: 71412503

Page | 2



professional insurances, and expertise to perform the scope of work desired. If needed, financial statements, certificates of insurance, and profit and loss statements will be provided.

In conclusion, the team has the corporate capabilities, experience, and resources to successfully execute this Leadership Coaching Services requirement. Our response is valid for 120 days and please contact me on 202-745-3700 for any additional information.

A handwritten signature in black ink, appearing to read 'G. L. Davis', with a horizontal line extending from the end of the signature.

Gregory L. Davis, Principal



SPECIFIC REQUIREMENTS

VI. UNDERSTANDING THE STATEMENT OF NEEDS

The PRM Team understands that Virginia Tech is seeking proposals from leadership coaching vendors with proven experience working directly with higher education institutions, to provide 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. Services to be provided include:

- ✓ One-on-One Leadership Coaching and Assessments - Providing one-on-one coaching sessions to leaders on an as needed basis, developing personalized coaching plans that align with the individual's strengths, development areas and career objectives, as well as proving support in addressing specific leadership challenges and building competencies such as accountability and responsibility, strategic decision making, collaboration and team development, communications and developing self and others. This activity will include utilizing leadership assessments to evaluate current leadership strengths and areas for improvement, and providing feedback and recommendations based on assessment results feedback and recommendations based on assessment results.
- ✓ Group Coaching, Workshops and Development Programs - Provide group coaching sessions for leadership teams or groups of emerging leaders on an as-needed basis while emphasizing collaborative leadership, team dynamics, and organizational performance improvement. These group sessions can take the form of workshops and seminars where development programs may be created as part of a comprehensive coaching strategy in which topics can cover executive presence, conflict resolutions, and change management.
- ✓ Ongoing Support & Accountability - Offer continuous support to participants throughout the coaching engagement to ensure progress toward established goals and that development plans are actionable with measurable outcomes.

VII.A.1. EXPERIENCE IN LEADERSHIP COACHING IN HIGHER EDUCATION

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



Together PRM and Thomas Management Consulting have over 50 years of experience in providing executive and leadership coaching to Federal, state, higher education and non-profit entities.

In previous and ongoing engagements, PRM has provided Executive Coaching (“Coaching”) and 360-Degree Assessments with a goal of (1) implementing leadership development initiatives that: (a) Builds and develops leadership and management competencies for employees; (b) Develop leaders with the ability to manage the complex changes and strategic challenges; and 3. Provide tools and opportunities for leaders to continue to strengthen their skills and perform at a consistently high level.

VII.A.1 Experience with VT and the Higher Education Industry

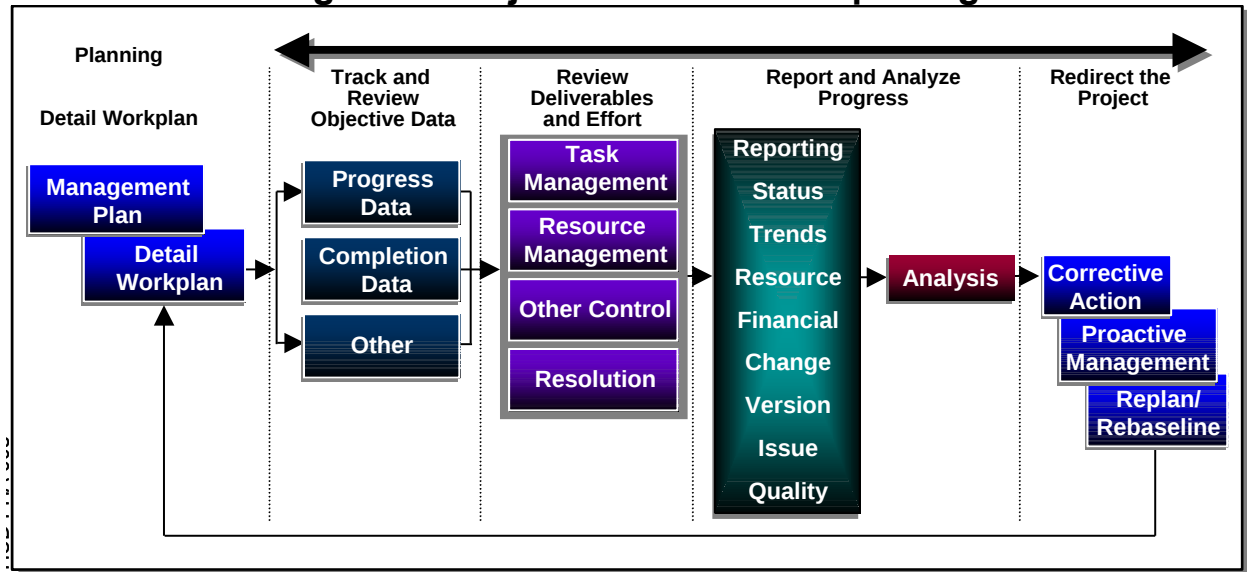
PRM Consulting, Inc. is a corporation established in 1999 to conduct human resource consulting services including executive coaching, assessments, employee engagement studies, professional development, classification, compensation, executive search, and retirement services. Headquartered in Washington, DC; PRM has significant experience and highly rated past performance working with universities and colleges that include:

- Virginia Polytechnic Institute and State University
- Virginia Commonwealth University
- The University of Virginia
- Virginia State University
- The University of North Carolina – Chapel Hill
- Georgetown University
- The University of Maryland – College Park
- The University System of Maryland
- The University of Texas – Austin
- Morehouse College
- Brown University
- Rensselaer Polytechnic Institute (RPI)

VII.A.1 Coaching Methodologies and Approaches

The PRM Consulting Team’s approach to a successful project begins with establishing an effective and continuous working partnership with our clients (see Figure 1).

Figure 1: Project Control and Reporting



From the start of the project, PRM implements a Quality Control Program that includes several components to ensure high quality services are provided that meet and exceed the client's needs and requirements. Some of the Quality Control mechanisms include:

- Engagement Quality Assurance Program (QAP)
- Project Management Tools and Resources

PRM Quality Assurance Plan is based upon our methodology which provides a single integrated approach to our consulting engagements without targeting a specific industry, technology, vendor, or governance standard. The PRM Quality Assurance Plan core methodology is designed to complement several industry-leading, adopted governance standards that includes:

- **Project Management Approach** - PRM's Quality Assurance Plan Methodology consists of life cycle work streams. The work stream provides a single, consistent approach for planning and managing your engagements. The life cycle work streams address specific competencies, while providing overall integration across the full engagement life cycle. The PRM methodology has the flexibility to be adapted to meet our client's specific requirements, while our practitioners follow our established practices.



- **Phased Schedule** – PRM’s Quality Assurance Plan includes detailed planning activities that are typically performed prior to major projects. For client engagements, we develop the Quality Assurance Plan using Microsoft Project and will include all activities, resources, timeframes and known dependencies required.

Communications Strategy – The Communications Strategy we execute articulates the overall project vision and project strategy throughout the organization. The objective of the Communications Strategy is to facilitate and ensure the right messages are delivered to the right audiences at the right time.

- **Constraints** – PRM takes organizational constraints into account. The three classical project constraints are funding, time, and resources. The project plan must balance these factors within the client environment.
- **Project Performance Metrics** - A set of performance metrics will be developed to measure cumulative project progress against planned progress for the project’s duration. Numeric and/or graphical representation makes it easier to spot trends. The project may mention earned value reports, and plots of Schedule and Cost variances.
- **Cost Estimate for Deliverables** - As mentioned above, the staffing portion of the Project Plan would be the foundation for the development of cost estimates.

VII.A.1 Ability to Meet Deadlines

PRM’s project management process (PMP) is used for all projects to ensure all deadlines are met. In addition to the software used, regular project meetings are held with team members to get project updates, determine status, resolve outstanding action items or issues, and to mitigate any risks. The project schedule used for delivery of the contract is produced in collaboration with the client project manager or his/her agent. Open communication allows for realistic schedules to be produced that both the business and the vendor can commit to. As a deliverable on contracts, PRM is accustomed to providing periodic reporting (weekly, monthly, and quarterly) as required by VT designated representatives. PRM anticipates that a report for this engagement might include such information as the number of sessions, dates and timings, venues, or even schedules.

VII.A.1 Confidentiality

PRM is a respected company in providing Executive Coaching to highly influential clients and each engagement begins with a declaration of the importance of confidential

VIRGINIA TECH (VT)

RFP Title: Leadership Coaching Services Bid Number: 71412503

Page | 7



performance, maintaining integrity and ethical behavior. Strict confidentiality is the cornerstone in establishing the trust needed to openly discuss issues that are at the source of client's concern. It is extremely important that this confidentiality is bi-lateral to allow the Executive Coach to be candid enough to make the session as valuable as it can be. All PRM resources selected to work on this project are International Coaching Federation (ICF) credentialed coaches and have a duty to uphold **confidentiality**: to not divulge any information received in the process of the coaching engagement without client permission.

In addition, once the project is awarded and before work has begun, all PRM members will participate in an initial project briefing which will reiterate the company and client's confidentiality requirements.

VII.A.2. OVERVIEW OF THE COACHES' QUALIFICATIONS

Provide an 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.

VII.A.2 Knowledge and Application of Coaching Competencies

All coaches offered as part of this contract are certified by the International Coaching Federation (ICF). We have found that holding a credential – especially an ICF Credential – is extremely important to today's coaching clients. The ICF Credential is a professional certification indicating that you have completed a rigorous credentialing process designed to develop and refine your coaching skills. Part of the credentialing process is the knowledge of the ICF Core Competencies which were developed to support greater understanding about the skills and approaches used within today's coaching profession. All coaches proposed for this contract are Certified Coaches with knowledge and application of the coaching competencies.

Coaching is most successful when both parties can build trusting relationships with the other. Style and approach are important elements to building trust quickly. Contracting is an important competency and key to establishing the coaching relationship at the beginning. The agreements are revisited throughout the engagement as an ongoing process of discovery and adjustment.

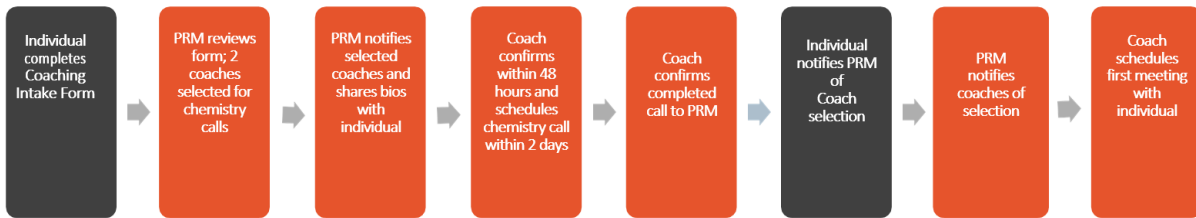
VII.A.2 Ability to Provide Qualified Coaches

The beginning of the coaching relationship is about establishing rapport and trust. Therefore, it is vital that clients are paired with the right coach. The resumes of our



coaches will include a description of his or her background, credentials, experience, and style/approach.

Coach Selection Process – Executive coaching is an extremely effective method to quickly up-level a leader's skills, boost team productivity, and increase overall organizational effectiveness. Coaching is an important relationship, so we ask all clients to look for a personal connection between them and the coach they choose. The goal is to complete the coach selection process in 1-2 weeks.



Coach Engagement Process – Individuals and Coaches participate in one-hour sessions built around the Coaching Agreement and creating and implementing the Coaching Development Plan focused on goals, strategies, success measures, and an implementation timeframe.



Below is the description of the proposed process for coach selection and engagement.

- Once a request for executive coaching services is received, the coachee is sent an Executive Coaching Information Sheet. The form will be used to identify potential executive coaches who can work with the coachee to reach their goals and objectives (see Appendix A)
- Once the Information Sheet is returned, a review is made of the coaching requirements against the qualifications/education, etc., of the coaches available.
- Two coach bios/resumes are selected and forwarded to the coachee for review the bios/resumes and then schedule a telephone interview with the coaches.
- Following selection, the coach shall meet with the participant to establish a coaching agreement that: clarifies roles, responsibilities, and boundaries; identifies goals and



expected outcomes tied to high priority organizational and development needs; and identifies how success will be measured.

Our proposed personnel include individuals with significant, relevant experience and certifications. Our PRM Consulting/Thomas Management Consulting Team also includes individuals with coaching, leadership development, and training experience to leverage best practices. With this project, we look forward to the opportunity to work closely with VT executives, subject matter experts, and managers.

The following matrix highlights each of our representative personnel's expertise relative to the various tasks related to the solicitation. PRM has an extensive list of coaching resources and does not have any limitations on the reasonable number of coaches that might be assigned. The asterisked names are key personnel for the overall planning and guidance for a successful project.

Team Member	Project	Certified Coaches	Leadership Development Training	Eq-I and EQ 360	Team & Group Coaching	Global Team Coaching Institute	Leadership Circle Profile	Hogan	True Colors	Strength Finders	Myers-Briggs Type Indicator	Quality Assurance
*D. Marlene Thomas, M.S., PCC	X	X	X	X	X	X			X	X	X	X
Malva Reid, Ph.D., PCC		X	X	X	X							
Todd Dallanegra, PCC		X	X	X	X		X					
Walt Hogan, PCC		X	X			X		X				
Jo Ann Lucero, PCC		X	X									
Jerusalem Howard, Ph.D., PCC		X	X				X	X		X		
Lorri Manasse, PCC		X	X	X	X						X	
Kenny Leahman, PCC		X	X	X	X						X	
Anna Alvarez Boyd, ACC		X	X	X	X						X	
Karen Benoy Preston, PCC		X	X		X	X						
Chelese Perry, PCC		X	X	X	X							
Barrhonda White, PhD, PCC		X	X	X	X		X	X				

VIRGINIA TECH (VT)

RFP Title: Leadership Coaching Services Bid Number: 71412503

Page | 10



	Project	Certified Coaches	Leadership Development Training	Eq-I and EQ 360	Team & Group Coaching	Global Team Coaching Institute	Leadership Circle Profile	Hogan	True Colors	Strength Finders	Myers-Briggs Type Indicator	Quality Assurance
Team Member												
*Gregory Davis, Quality Assurance												X

Resumes are included in the appendix section of this submission.

VII.A.2 Application of Coaching Competencies Towards VT's Hokie Dozen

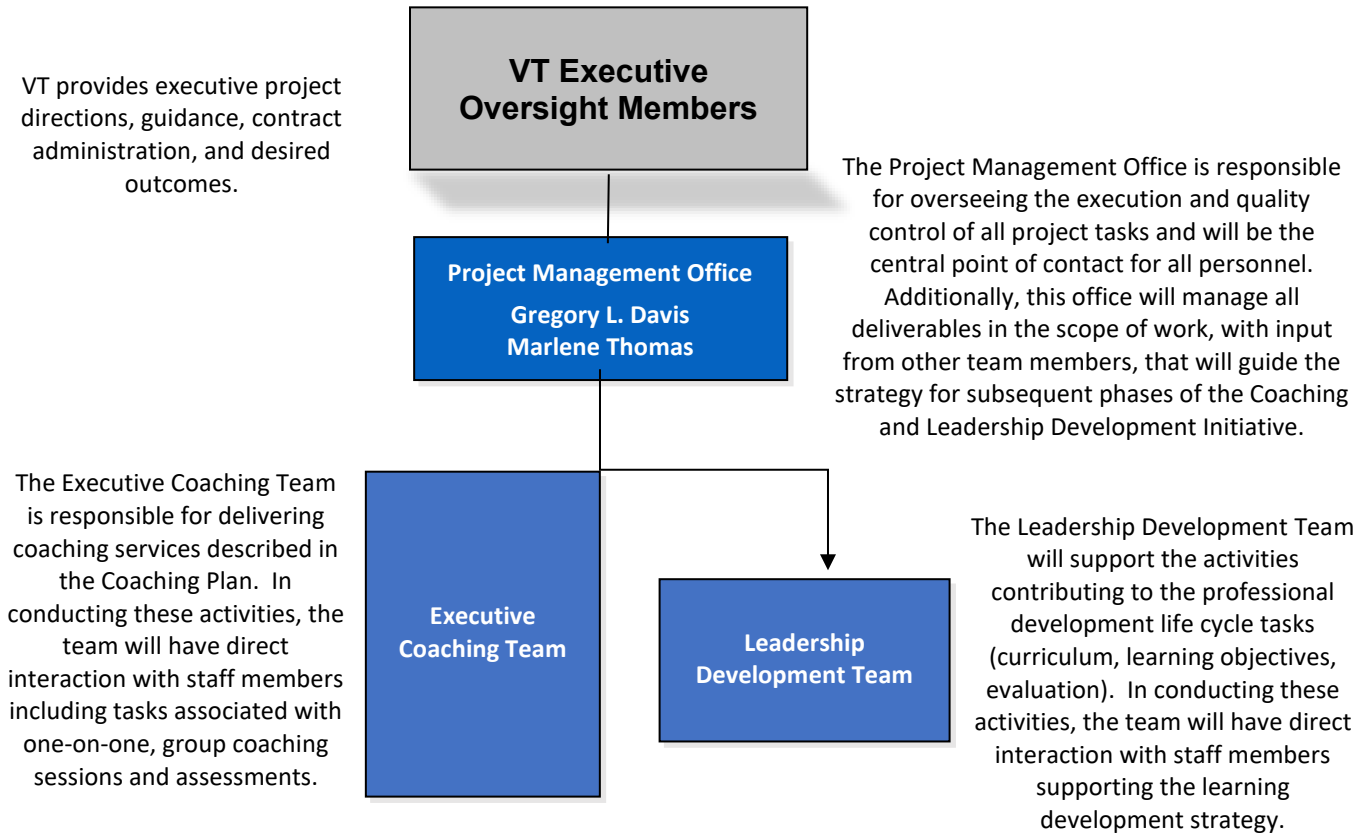
As part of the PRM coaches' orientation they will be informed of Virginia Tech's Leadership Excellence Program including the 13 Hokie Dozen Leadership Competencies, and five core modules of Leadership Essentials (Fast Track for New Supervisors) Program. This information will be shared and used to focus planning and content of coaching sessions towards accomplishing the stated goals of Virginia Tech and marry those with the personal goals of the participant ("coachee"). Similar approaches would be applied, if information is available, for other educational institutions that may take advantage of this Cooperative Procurement Agreement within the state of Virginia.



VII.A.3. DETAILED DESCRIPTION OF THE APPROACH TO BE TAKEN

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.

The PRM Consulting/Thomas Management Consulting Team proposed for this initiative have extensive experience in performing similar projects. Our team combines subject matter knowledge and applicable professional certifications in the four (4) key disciplines that are integral to the success of a Leadership and Executive Coaching Initiative: Project Management, Coaching Senior Staff, Leadership Development, and Quality Assurance. We have organized the team to help ensure the necessary quality control, management oversight, technical depth, and focus on specific tasks. Below is the team organization structure, including the roles and responsibilities of its members. Full resumes of key and representative personnel are included in the appendix section of this submission.





VII.A.3 Proposed Approach

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. The process of coaching often unlocks previously untapped sources of imagination, productivity and leadership.*” One-on-One coaching includes confidential sessions of an agreed-upon length, depending on the participant’s needs.

Executive coaching is a one-on-one process to benefit the leader and his/her organization. Working with goals defined by both the leader and the organization, a qualified and trusted coach uses various coaching methods and feedback data to develop the leader's capacity for current and future leadership roles and challenges.

Executive coaching can also be successful as a three-way partnership among coach, executive, and the executive's organization. Each partner has an obligation and responsibility to contribute to the success of the coaching process. Although the primary work is between executive and coach, coaching is always an organizational intervention and, as such, should be conducted within the context of the organization's goals and objectives. An engaged client's manager can help the coach understand what has prompted the organization to invest in coaching the client - helping coach and client shape the coaching engagement. It is therefore possible, when recommended by the coachee, that the manager participates in the first session or as an option.

The client's manager has a unique opportunity to help the coach understand and identify what success looks like for the client. By asking the client's manager what the client is strong at and what needs to do to improve, we can explore what the client needs to achieve and/or to be better perceived as successful. Together they collaborate and co-create to define goals and objectives.

Prep and post hours are normally included in the proposal for Individual Executive Coaching Sessions to allow the coach to provide support to clients before and in between coaching sessions. This is normally allocated at 50% of the total approved coaching hours for that individual. Similarly, prep and post hours are normally included in the proposal for Team / Group Coaching Sessions to allow the coach to provide superior preparation for the needs of the group before and after coaching sessions. VT did not include these specific requirements in its SOW, however the PRM Team feels that it is a significant component to providing superior responses that would be most beneficial to VT.



Therefore, the PRM Team has proposed that these hours be included as part of the response.

The PRM Team offers coaches who are steeped in the ICF methodology. Three of the coaches who will be assigned to this contract are the past and current Presidents of the ICF Metropolitan DC Chapter (the largest city chapter in the world).

VII.A.3 Proposed Activities / Coaching Plan

The PRM Team is proposing a comprehensive approach to the Executive Coaching services required in this solicitation. We feel that VT could utilize our comprehensive offering to provide its Executives, Leaders, and Managers with the best opportunity to achieve its objectives.

PRM employs a bench of executive coaches who possess a rare blend of expertise and not only excel in guiding individuals towards their professional best through coaching, but also shine as exceptional trainers in essential areas of modern leadership. Our versatile coaches have honed their skills to navigate the dynamic landscape of remote team management, imparting insights that bridge the geographical gap and foster cohesive collaboration.

With a keen understanding of interpersonal dynamics, PRM coaches adeptly navigate the intricacies of communication in virtual settings, ensuring that leaders communicate with clarity and empathy across digital channels. PRM's coaching methodology of mastering emotional intelligence empowers executives to connect authentically, fostering stronger relationships and a more inclusive work culture. Additionally, the coaches champion the development of a comprehensive suite of executive traits, from strategic thinking to adaptability, equipping leaders with the tools needed to thrive in today's complex business environment. Through PRM's guidance, your executives will not only unlock their full potential, but also cultivate a new era of leadership that is agile, empathetic, and poised for lasting success.

VII.A.3 One-on-One leadership Coaching

The PRM Team will offer the following solutions: 1) matching clients and coaches, 2) deliver coaching services as approved by VT on the respective intake form, and 3) provide supplemental client support materials within the approved respective level of effort. PRM will ensure that a contract is in place at the start of each engagement and ensure strict compliance with ICF coaching standards.



The goals of a particular coaching engagement may include, but shall not be limited to:

- Increase the participant's awareness of his/her leadership behavior, style, and impact
- Preparation for an increase in leadership responsibilities or challenges
- Adjust the participant's leadership approach in a new or dynamic situation
- Improve the participant's executive presence and relationship management skills with senior leaders
- Provide authentic 360° feedback from fact-finding sessions with other parties to obtain information on a participant's leadership style and behaviors from all levels (direct reports, peers, etc.)
- Increase the participant's awareness of their personality preferences and how it translates for him/her in leadership roles

Executive coaching for an individual shall include but is not limited to:

- One-on-One sessions. These sessions will be one (1) hour in length, occurring twice monthly and lasting for twelve (12) months, or as defined in the agreement. Individual sessions with participants must be kept confidential.
- These sessions will use the applicable methods and materials for areas to include:
 - Leading Remote Teams
 - Employee Engagement
 - Interpersonal Communication
 - Emotional Intelligence
 - Organizational Success
 - Leading Change and People
 - Political Savvy

VII.A.3 Group / Team Coaching

The PRM Team sees significant opportunities for VT to leverage the benefits of Group / Team executive coaching in the investment it is making in its leadership team. Group / Team executive coaching is extremely effective in driving transformational change across functional teams and it provides critical support to both the individual executive and top management.



Group coaching as defined by ICF is smaller, more intimate coaching of potentially unconnected individuals who are looking to learn in a group environment. The focus typically, though not exclusively, is on personal development and growth.

Team coaching is partnering with an intact team in an on-going relationship to raise awareness to build better connections in the team's internal and external systems. Team coaching enhances the team's ability to cope with current and future challenges.

PRM proposes that VT requests 2-hour sessions for both Group Coaching and Team Coaching sessions. These sessions will use the applicable methods and materials for areas to Include:

- Leading Remote Teams
- Employee Engagement
- Interpersonal Communication
- Emotional Intelligence
- Organizational Success
- Leading Change and People

To accomplish the improvements through group / team coaching, PRM will perform the following tasks:

1. **Contracting:** It is important that the work starts with initial exploratory discussions, often with VT's team gatekeeper, team leader and possibly the team sponsors. The contract will ensure there are clear expectations throughout the engagement, including but not limited to, two-way expectations and how success will be evaluated. Other important topics to be discussed are the length and frequency of the engagement; activities involved - interviews, workshops, attending meetings, individual sessions and with whom; working protocols on such issues as confidentiality; and initial exploratory discussions.
2. **Inquiry or Co-Inquiry** - The inquiry phase can take many forms but is essentially about collecting relevant data and impressions about the team, their performance, functioning and dynamics; the team members and their relationships; and the relationship between the collective team and their commissioners and stakeholders. It is suggested that VT would decide what is more appropriate for the organization. Analyzing the data from these inquiries, assessments or interviews at the team, group, department, or organizational level will help VT target specific improvement actions that can dramatically change the results. The work can be accomplished by one or



more of the following:

- Have individual semi-structured meetings with each member of the team.
- Send out a questionnaire that asks each person for his or her perceptions of the team and what is needed.

3. **Discovery, diagnosis, and design** - The data from all three sources (performance data, questionnaires and interviews) needs to be sorted and analyzed. This is not to arrive at definitive conclusions about the team, but to develop emerging hypotheses, including the possible focus for team coaching. To carry out this analysis for teams that are on the journey from being a reasonably effective team to being high performing, we use a prescribed process for mapping where the team is functioning well and where it is currently challenged. This can also help in deciding the team coaching journey.

Once the initial contracting and inquiry are complete, the PRM Team will meet with VT. Both parties will discuss: 1) contract the objectives, 2) process and chart a course for the group coaching journey, 3) define the beginning and destination in which the team needs to arrive at the conclusion of the coaching process, and 4) decide what needs to be addressed and focused on in the coaching work. Unlike a one-on-one coaching conversation where it is common to have the individual client set the agenda, it can be useful to have an anchoring theme for each session which group members use to ground their thinking or focus. For example, one week of a group/team coaching program, participants may focus on political savvy or self-awareness.

The PRM Team will co-design with the team an effective journey and deliver a group coaching program that will help team members develop authentic relationships that promote transparency, idea exchange, creativity, trust, and mutual problem solving. VT team members will increase their comfort in working across myriad boundaries of diversity and learn to leverage diversity as an asset that leads to higher quality interactions and solutions. The participants will demonstrate proficiency by holding themselves and colleagues accountable for performance and behaviors that impact team performance and atmosphere. The PRM Team will rely on well-established and proven coaching theories to facilitate team member dialogue that penetrates to the core values and beliefs that affect their relationships.

High levels of mutual trust and collective self-belief are hallmarks of a high-performing team. Neither happens overnight. Group coaching will help the VT team members



articulate and align their personal values with the team values. They will also develop more effective habits of collegial supportiveness.

Part of PRM's role is to ensure that the coaching and development process continues between the formal coaching sessions and after our relationship with the team ends. Therefore, it is critically important that the group coaching process includes helping the VT team leader understand the systemic nature of the issues they bring to coaching. Group coaching does not end, rather it transitions from being done by an external coach to the VT team itself. This transition should be a process not an event, and PRM's ultimate goal is to help the VT employees develop their ability to continue the coaching experience themselves.

VII.A.3 Recommended Assessments and Inquiry Questionnaires

In our experience, assessments help the coach have a better understanding of their clients and provide greater self-insight and self-awareness to “coachees.” Assessments can also help clients create actionable goals with a more complete understanding of themselves. Such information helps the client and coach explore progress on stated goals and set new or refined goals that address the organization's expectations – giving the coach a broader perspective on what success means in the organization. The list below includes several assessments which are available to help the client.

- ***Eq-I and EQ 360***
 - o 360 Assessment - is a non-judgmental survey that helps a person understand their behavioral preferences and personality style. Furthermore, it is designed for a person not only to understand themselves, but also their peers. Organizations and teams use this tool to build trust and deepen interpersonal relationships. These assessments provide a framework in which communication and interpersonal relationships can be personalized so that each person hears the message based on their priorities and clearly understand how their strengths enable the accomplishment of the vision. Better employee communication means efficiency on both the individual and the organizational level.
- ***Team Coaching International:***
 - Team Diagnostic Assessment - With the Team Diagnostic™ team assessment the team's needs are explored independent of the needs of any single member. This shifts the attention and the work of the team to the team itself.
- ***Global Team Coaching Institute Assessments:***



- o The Trust Questionnaire - Every model of team performance places trust amongst its fundamental characteristics. The Trust Questionnaire is a useful tool for exploring the level of trust amongst team members.
- o How Much of a Team Player are You - This simple questionnaire gives individuals on a team useful insight into themselves as team players. It can be used as a self-diagnostic, or for feedback from team colleagues, or both.
- **Leadership Circle Profile**
Leadership Circle assessments are best-in-class tools that empower leaders with clear cut insights into their leadership strengths and development opportunities. Driven by an exhaustive database of over 4 million assessments, the Leadership Circle Profile™ 360° assessment is a data-driven model for leadership development, trusted by the most influential companies in the world.
- **Hogan**
Hogan is a leadership assessment that provides companies with the tools to identify and develop talented leaders, boost employee engagement, and drive business results.
- **True Colors**
True Colors® is a personality inventory system that uses colors as metaphors for understanding human characteristics. By using colors to identify personality types, you will have at your disposal a quick and fun way to better understand coworkers and colleagues. This is a great tool with which to support professional relationships through better communication and respect for people's uniqueness.
- **Strengths Finder**
The Clifton StrengthsFinder is a strengths-based measure of individual emotional, cognitive, and social skills and talents.
- **Myers–Briggs Type Indicator**
In personality typology, the Myers–Briggs Type Indicator (MBTI) is an introspective self-report questionnaire indicating differing psychological preferences in how people perceive the world and make decisions. It enjoys popularity despite being widely regarded as pseudoscience by the scientific community.



VII.A.3 Proposed Deliverables, Milestones and Frequencies

The PRM Team acknowledges the required deliverables of this solicitation in the table below.

Deliverable	Proposed Due Date / Frequency
VI.1.a. Individual Leadership Coaching Provide one-on-one coaching sessions to leaders within the organization on an as needed basis	Proposed: Two (2), one (1)-hour Coaching Sessions per Client per month. Proposed: Pre/Post hours at one-half of the approved Coaching hours. As required and agreed upon in the Terms of the Purchase Order
VI.1.b. Individual Leadership Coaching Develop personalized coaching plans that align with the individual's strengths, development areas and career objectives.	Proposed: Due two (2) weeks after feedback on Individual's assessment.
VI.1.c. Individual Leadership Coaching Support in addressing specific leadership challenges and building competencies such as emotional intelligence, strategic thinking, team management, communications and decision making.	Ongoing as identified by Individual's assessment or Executive Leadership and proposed in the Individual's Personalized Coaching Plan.
VI.2.a Group Coaching Provide group coaching sessions for leadership teams or groups of emerging leaders on an as-needed basis.	Proposed: One (1), 2-hour Group Coaching session per month. Proposed: Allocation for one (1) hour per session for facilitator Prep/Post time. As required and agreed upon from Purchase Order
VI.2.b Group Coaching Emphasize collaborative leadership, team dynamics, and organizational performance improvement as needed.	Proposed: Use feedback and direction provided by Executive Leadership to ensure consistency with expectations.
VI.3.a Workshops & Development Programs Offer workshops, seminars or leadership development programs as part of a comprehensive coaching strategy.	Proposed: Use direction provided by Executive Leadership to plan and schedule delivery to ensure consistency with expectations.
VI.3.b Workshops & Development Programs Topics may include, but are not limited to: executive presence, conflict resolutions, change management.	Proposed: Use feedback and direction provided by Executive Leadership to ensure consistency with expectations.



VI.4.a Assessments Utilize leadership assessments to evaluate current leadership strengths and areas for improvement.	Proposed: Several assessment options from which Client can select their preference for their Group/Team.
VI.4.b Assessments Provide feedback and recommendations based on assessment results.	Proposed: Included as an Activity/Task in the assessment process to provide Participant with feedback.
VI.5.a Ongoing Support & Accountability Offer continuous support to participants throughout the coaching engagement to ensure progress toward established goals.	Proposed: Ongoing as identified and agreed upon in the Terms of the Purchase Order.
VI.5.b Ongoing Support & Accountability Create actionable development plans and track measurable outcomes.	Proposed: Ongoing as identified by Individual's assessment or Executive Leadership and proposed in the Individual's Personalized Coaching Plan.
Monthly Progress Reports	Monthly

Sample Fixed-Duration Virtual One-on-One Coaching Programs		
Items Common to All Programs		
➤ Mapping/Chemistry Session ➤ Goal setting discussion ➤ One Assessment - EQ-i2.0 ➤ 2 x 60-minute sessions (twice a month as scheduled) ➤ Texting/WhatsApp support in between sessions ➤ Books, journal articles, podcasts ➤ Emergency Zoom/Teams calls as needed		
• Mapping/chemistry call – The first call is an onboarding call with a new client. Client and coach get to know each other and share information. Client asks as many questions as possible to understand where they are and where they want to go. • Goal setting – While each coaching conversation is different, many clients desire to set goals for their time spent with their coach. This conversation is a discussion of what they believe their goals are for this engagement as it appears now. • Create a collaborative and safe environment – As an ICF coach, ensures client thoroughly understands the importance of confidentiality and the responsibility of the coach towards ethical practice and performance of the coaching engagements.		
3-Month Program	6-Month Program	12-Month Program
➤ Email support for 3 months	➤ Email support for 6 months	➤ Email support for 12 months



PRM coaches are located in the Washington, DC Metropolitan area and as an option, could provide In-person services at the Washington, DC satellite location. In-person coaching at other locations would incur travel cost reimbursement at the GSA rate and an increase in the coaching rate.



VII.A.4. DETAILED BREAKDOWN OF PRICING

A clear breakdown pricing for individual coaching, group coaching, workshops, assessments and any other relevant services.

Virginia Tech Leadership Coaching Services Cost Proposal					
Individual Leadership Coaching, Group Coaching, Workshops & Development, Assessments, Ongoing Support					
Item #	Deliverable	Unit Measure	Virtual	In Person	Payment Invoiced
VI.1	Individual Leadership Coaching				
	MCC Credentialed Coach	Hour	\$550	\$660	Monthly
	PCC Credentialed Coach	Hour	\$375	\$450	Monthly
	ACC Credentialed Coach	Hour	\$325	\$390	Monthly
	Recommendation is for two (2), one (1)-hour Coaching Sessions per Client per month. Allocation for Prep/Post hours is one-half the number of the approved Coaching hours. <i>Prep/Post hours are billable at the same rate.</i>				
VI.1 Options	Individual Leadership Coaching (Virtual Only) Fixed-Duration Options (See Section: VII.A.3 Proposed Deliverables)				
	Three (3) Months (Proposal is for two (2), one (1)-hour Coaching Sessions per Client per month.)	Fixed Per Participant	\$3,000	N/A	Proportion Monthly
	Six (6) Months (Proposal is for two (2), one (1)-hour Coaching Sessions per Client per month.)	Fixed Per Participant	\$6,000	N/A	Proportion Monthly
	Twelve (12) Months (Proposal is for two (2), one (1)-hour Coaching Sessions per Client per month.)	Fixed Per Participant	\$12,000	N/A	Proportion Monthly
VI.2	Group/Team Discovery, Diagnosis & Design (Virtual or DC Satellite)	Session	\$4,000	\$4,800	Month After Acceptance
	Conduct Initial Exploratory Discussions (Virtual)				
	Ensure Clear Expectations for the Engagement				
	Program Design and Development; Delivery/Presentation				
VI.3	Group/Team Coaching Workshops (Virtual or DC Satellite) (See Assessment Options Table Below)	Session	\$5,000	\$6,000	Month After Acceptance
	Virtual Working Session with the team				
	Review of survey results and team assessment debrief				
VI.5	Ongoing Support & Accountability				
	MCC Credentialed Coach	Hour	\$550	\$660	Monthly
	PCC Credentialed Coach	Hour	\$375	\$450	Monthly
	ACC Credentialed Coach	Hour	\$325	\$390	Monthly
Virginia Tech Leadership Coaching Services Cost Proposal					
Program / Project Management					
Item #	Deliverable	Unit Measure	Unit Price		Payment Invoiced
VI.5.Pgrm	Program / Project Management				
	Program Management	Hour	\$400		Monthly
	Project / Resource Management	Hour	\$300		Monthly



Virginia Tech Leadership Coaching Services Cost Proposal				
Assessment Options				
Item #	Deliverable	Unit Measure	Unit Price	Payment Invoiced
VI.4	Assessment Options			
	Eq-i and EQ 360 Assessment	Assessment	\$350	Month After Completion
	Team and Group Coaching International	Assessment	\$350	Month After Completion
	Global Team Team Coaching Institute	Assessment	\$350	Month After Completion
	Leadership Circle Profile	Assessment	\$575	Month After Completion
	Hogan	Assessment	\$350	Month After Completion
	True Colors	Assessment	\$300	Month After Completion
	Strength Finders	Assessment	\$300	Month After Completion
	Meyers-Briggs Type Indicator	Assessment	\$300	Month After Completion



VII.A.5. THREE REFERENCES

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

When dealing with executive coaching and leadership development projects, past performance is often the best predictor of future success. The PRM Team's experience, spanning both Government and commercial enterprises, offers the VT a high degree of relevant experience and best practices. We have an excellent reputation for serving as business partners and advisors alongside our clients. We are confident that our references below will provide the VT with positive insights related to the PRM/Thomas Management Consulting Team's performance and satisfaction.

Professional Reference No. 1	
Agency/Company Name	Virginia Commonwealth University
Contact Name, Title, Telephone Number, Email	
Timeframe/Service Dates	Our team provided leadership training and coaching services to multiple staff members since 2019 through the present.
Brief Description of Coaching Services	VCU's Executive Coaching Program was designed to develop the leadership competencies and culture needed to meet specific challenges and business realities. Executive coaching provided included assistance to officers, managers, and supervisors in mastering new attitudes and behaviors. Designed as a one-on-one developmental experience for the mid- to senior-level executive, our coaches focused on skills necessary for manager/supervisor and leaders to make a leap forward in leadership capability.

Professional Reference No. 2	
Agency/Company Name	University of North Carolina at Chapel Hill (UNC)
Contact Name, Title, Telephone Number, Email	
Timeframe/Service Dates	2014-2017
Brief Description of Coaching Services	UNC Leadership Team hired PRM from a competitive request for proposal process to procure Executive Coaching ("Coaching") and 360-Degree Assessments with a goal of (1) implementing leadership

VIRGINIA TECH (VT)

RFP Title: Leadership Coaching Services Bid Number: 71412503

Page | 25



	development initiatives that: (a) Builds and develops leadership and management competencies at the Board for employees; (b) Develop leaders with the ability to manage the complex changes and strategic challenges the Board will face going forward; and 3. Provide tools and opportunities for leaders to continue to strengthen their skills and perform at a consistently high level. In addition to the executive coaching program, PRM conducted an independent employee survey to assess the climate and culture of the Housekeeping Department (“the Department”) and prepare a report identifying the findings, recommendations, and suggested action plan to address and eradicate any existing impediments to success.
--	---

Professional Reference No. 3	
Agency/Company Name	University of the District of Columbia
Contact Name, Title, Telephone Number, Email	
Timeframe/Service Dates	2021 – present.
Brief Description of Coaching Services	Our team provided coaching services to search committee members during multiple hiring requests. In addition, our team provided advisory in how to lead project management teams within in the University’s Office of the President.

Professional Reference No. 4	
Agency/Company Name	Smithsonian Institution - NMAAHC
Contact Name, Title, Telephone Number, Email	
Timeframe/Service Dates	2022 – present.
Brief Description of Coaching Services	Provides one-on-one coaching services for the Smithsonian Institution (SI) National Museum of African American History and Culture (NMAAHC). Clients included multiple executives within various offices of the broad organization, most of whom were authorized for a minimum of twelve (12) coaching hours over the term of the engagement. Current purchase order includes group/team coaching to contract the objectives, process and chart a course for the group coaching journey, define the beginning and destination in which the team needs to arrive at the conclusion of the coaching



	process, and decide what needs to be addressed and focused on in the coaching work.
--	---



VII.A.6. PARTICIPATION OF SWOB AND SWAM

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

For this engagement, we are partnering with Thomas Management Consulting (“PRM TEAM”), a SWaM certified (Certificate #: [REDACTED]), Woman Owned Small Business Enterprise that specializes in executive and leadership coaching, and that we have successfully worked with on similar engagements with highly rated client satisfaction for ten (10) years. See certificate information below for Thomas Management Consulting (TMC), LLC.

COMMONWEALTH of VIRGINIA
Department of Small Business and Supplier Diversity

Company Name: Thomas Management Consulting (TMC), LLC

Certification Number: [REDACTED]

Small Certification Start Date: Jun 20, 2023

Women Owned Certification Start Date: Jun 20, 2023

Minority Owned Certification Start Date: Jun 20, 2023

WOSB Certification Start Date: Jun 20, 2023

SWaM Certification Expiration Date: Jun 20, 2028



VII.A.7. SUBMISSION INSTRUCTION PAGE AND ADDENDA

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.scquest.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]

2



APPENDICES

RESUMES

D. Marlene Thomas

D. Marlene Thomas is President & CEO of Thomas Management Consulting (TMC) LLC, a Woman Owned Small Business (WOSB) that provides strategic consulting and executive coaching services to Federal, State and private sector businesses. She has over 25 years of experience in leadership and executive coaching, organizational development and project management.

Her coaching and consulting practice is dedicated to supporting individual employers and leaders as they build productive partnerships, teams and workplaces. TMC has provided leadership development training, teambuilding, and project management support in her work with a variety of public and private sector clients and partners. Clients include but are not limited to, University of North Carolina at Chapel Hill, Virginia Commonwealth University (VCU), St. Luke's Institute, Interdynamics, Inc., the Department of Commerce (NOAA), Federal Aviation Administration (FAA) and District of Columbia government. She has worked with numerous non-profits including the United Negro College Fund and So Other's May Eat.

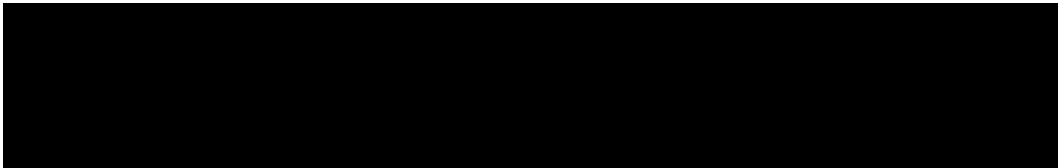
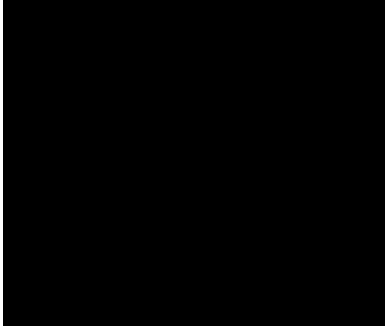
Marlene is a former member of the Senior Executive Service (SES) with over 25 years of demonstrated management of complex systems in Federal, State and local organizations. She has worked with individuals and teams in for-profit and non-profit settings including government, technology, education and health care associations. She has a strong capacity to create organizational cultures that enable individual contributors to develop their full potential while giving their best to exceed normal expectations. She is a proven leader with a multidisciplinary repertoire of skills and competencies in executing strategies and leading change in a fast-paced and fluid environment. Her technical and administrative background includes developing and implementing transportation regulations and policies, human capital initiatives, migrating IT architecture to implement a paperless environment, and overseeing legislative, regulatory, policy and legal mandates while ensuring program viability and customer service. She was Chief Financial Officer responsible for budget, finance and auditing for several organizations.

As a Professional Certified Coach (PCC), she believes that coaches are facilitators of positive change, and the role of the coach and client is a collaboration where the client is willing to do some homework to achieve his or her specific objectives. Marlene believes three words best describe her coaching style – authentic, engaging, curious. Her areas of coaching include leadership and executive development, career transition, personal and team effectiveness and coach mentoring. She provides pro bono coaching and mentoring services to several organizations including returning military service members and their families/caregivers during their transition to civilian life. Ms. Thomas has facilitated various focus groups including the assessment of Public Safety Practices, Management and Operations (departments of Corrections, Fire, Homeland Security, Police and Sheriff).

Marlene is the Immediate Past President, and former Membership Director of the Metro DC Chapter of the International Coaching Federation (ICF), the largest city chapter in the world with over 1700 members. She is an active member and volunteer for the Association for Talent Development (ATD), and the Society for Human Resource Management (SHRM).



- Areas of Expertise
- Leadership & Executive Coaching
- Team and Group Coaching
- Leadership Development Training
- Human Resource Management
- Industry & Sector Experience
- US Federal and State Government
- Non-Profit Organizations
- Private Industry
- Certifications
- International Coach Federation - PCC Coach
- CTI - Professional Coach(CPCC)
- DISC Certified Trainer & Partner
- EQ-I and EQ-360 Certified
- True Colors Facilitator
- GTCI Certified Team Coach
- NLP Brain-Based Coach Certification
- Education



Malva Daniel Reid

Malva Daniel Reid, ICF Associate Certified Coach (ACC), is a PhD trained psychologist with over 20 years of comprehensive and transferrable skills. These skills allow her to seamlessly navigate between corporate, government, nonprofit, and academic environments, where she has built sustainable operational infrastructure and growth while utilizing her strengths of coaching, leadership, program and personnel management, strategic planning and partnership development.

She coaches individuals and teams of executives and employees to achieve professional and personal goals utilizing a 360 evaluation process, and career assessment tools. She works with teams and leaders organizations to develop and implement strategic plans and administrative policies and procedures that assist executives and managers to achieve their mission, vision and goals. Facilitate meetings, retreats, and workshops for government, nonprofit, private, and community organizations that improve operational efficiency through alignment of strategic goals and objectives.

As the Associate Dean for Graduate Programs, Assessment and Operations for the University of the District of Columbia (UDC), School of Business and Public Administration, she oversees the revision and implementation of the SBPA strategic plan in alignment with the University's strategic initiatives. She communicate with stakeholders such as, University officials, faculty members, students, industry and government leaders, and community members to obtain support for programs and curriculum development. Oversee the day-to-day operation of the SBPA which includes the development of policy handbooks, implementation of communication strategies with stakeholders, and compliance with District, University and SBPA policies and procedures. Provide managerial oversight for short-term and long-term growth of undergraduate and graduate programs by keeping abreast of industry trends, employment statistics, and occupational demands.

She is a sought-after workshop presenter and facilitator who recently presented ACBSP Mid-year Forum, "The Challenges and Silver Linings on the Impact COVID-19 on Campuses", February 2021.

Malva is an active member of the Membership Committee of the ICF Metro DC Chapter. She recently served on the Program Committee for selection of the annual conference workshop presenters, and supports other chapter initiatives.

She is a past volunteer with the Maret School Board of Directors serving as a member of the finance committee and served on the accreditation committee for the 5-year review by the National Association of Independent Schools (NAIS) and conducted interviews with faculty, students, parents, and community leaders.



Areas of Expertise
Leadership & Executive Coaching
Leadership Development
Personal and Career Transitions

Industry & Sector Experience
US Federal and State Government
For Profit and Non-Profit Organizations

Certifications
International Coach Federation - ACC Coach
Co-Active Training Institute (CTI), CPCC
360 Assessments

Education

Todd Dallanegra

Todd Dallanegra, PCC, MAICS, has leveraged his unique combination of private/public sector and non-profit /social sector work within a global context to empower leaders to embrace change, move forward and authentically live out their calling for more than 20 years. He uses his strong cross-cultural and interpersonal skills that he honed while working with leaders for 13 years in Europe. He offers his clients insights and perspectives drawn from his work as a coach, trainer and facilitator around the world. Because he has native-like proficiency in French, he has worked with leaders from many countries to propel them forward to reach their goals. Whether coaching or training individuals, groups or teams, he serves as a catalyst for professional success and personal improvement.

Todd has coached and trained clients in French and English across Europe, Africa and the U.S. on issues including presence, resiliency, adaptability during change, employee engagement, well- being, strategy, inner critic/self-sabotaging attitudes, work-life harmony, designing interactive trainings/meetings and managing effectively by utilizing key skills: stimulating curiosity, developing active listening and reflective inquiry to successfully navigate organizational change and increase capacity to move people and mission forward.

Todd understands the challenges of professional and personal transitions as he integrated himself and his family into a foreign culture and launched professional initiatives in French, so he grasps the tensions of cross-cultural work-life balance and successfully navigating turbulent times. Because he has traveled to 40 countries, he easily relates to people from diverse backgrounds.

He delivered executive coaching at the National Science Foundation and was chosen from that cadre of coaches to develop and facilitate an Executive Forum. He delivers executive coaching at NASA Goddard Space Flight Center and Wallops Island Flight Facility, where he has coached various levels, including GS-15 and SES senior executives in science, communication, engineering, HR, IT and finance. He coached in the Executive Coaching Program of the award- winning CBP Leadership Institute and at Patient-Centered Outcomes Research Institute. He stood up and manages an Executive Coaching Program at the Office of the Chief Financial Officer in the D.C. government with 25 executives responsible for 1700 employees.

Todd has been coaching GS-15s in the Executive Coaching Program of the award-winning Custom and Border Protection (CBP) Leadership Institute since 2017. He has coached a broad range of CBP clients with diverse background in law enforcement who lead in the various offices/missions of CBP, many of whom have worked their way up the ranks.

He is Past President of ICF Metro DC Charter Chapter, ICF's largest city chapter in the world with 1500 members. He was awarded the Certificate of Achievement for Exemplary Coaching Service by NASA, where he has been coaching for six years.



Areas of Expertise

Leadership & Executive Coaching
Leadership Development
Personal and Professional Transitions

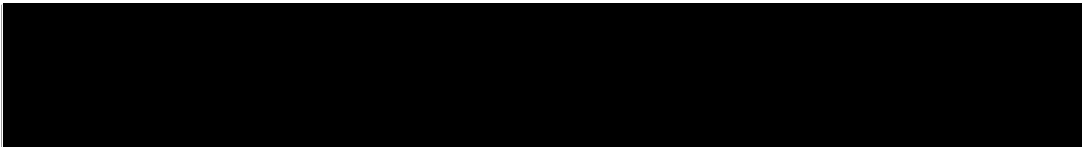
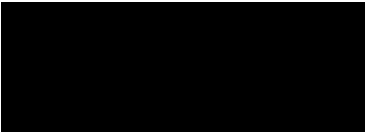
Industry & Sector Experience

US Federal and State Government
Non-Profit Organizations
Private Industry

Certifications

International Coach Federation - PCC Coach
Leadership Circle Profile & Manager Edition
Leadership Circle Culture Survey (Team)
DiSC Profile
Five Behaviors of Cohesive Teams

Education



Walt Hogan

WALT HOGAN is a certified ICF Professional Certified Coach (PCC), facilitator, and organization development (OD) consultant with over 25 years of experience. Walt has additional expertise in the areas of leadership, management and human resource development (HRD), and team and staff development. Walt's other interests and professional expertise are in the areas of team and group facilitation, performance management, conflict management, inclusion management and strategic customer satisfaction development. For over 25 years Walt has provided OD/HRD interventions and executive leadership coaching for Federal private and non-profit organizations.

Walt has held several managerial positions in both government (local and state) and private industry. . In addition, he has held several senior management positions within Cable and Wireless, (C&W), a multinational telecommunication company based in the United Kingdom. At (C&W) he led many organizational development, executive, leadership, and human resource development initiatives while managing a six-member training and development function; that supported over 5,000 employees. He coached over 50 global executives in leadership development.

Walt is a certified coach/trainer/facilitator/advocate in OD through National Training Labs (NTL). Certifications obtained: Brain Based Coaching, NeuroLeadership Institute, Hogan Assessment, DRiV, Workplace Mediation, (MBTI), Personal Profile System (DISC), and Performance Technology. 360° feedback certifications: Benchmark, The Leadership Circle 360 and Culture Survey, The CCL 360, BarOn Emotional Intelligence 360, Conflict Dynamics Profile 360, Personnel Decision International 360 (PDI). He has extensive experience using the following 360s, Birkman 360, The Leadership Practice Inventory (LPI), Russell Consulting, Development Dimension International (DDI), Lominger International Voices, OPM executive 360 and the Hogan assessment. Walt is also certified in customer satisfaction training and competency modeling. He is an active advocate and user of the HRDQ interpersonal assessments.



Areas of Expertise

Leadership & Executive Coaching
Team and Group Coaching
Leadership and Organizational Development
Executive & Leadership Training
Human Resource Management

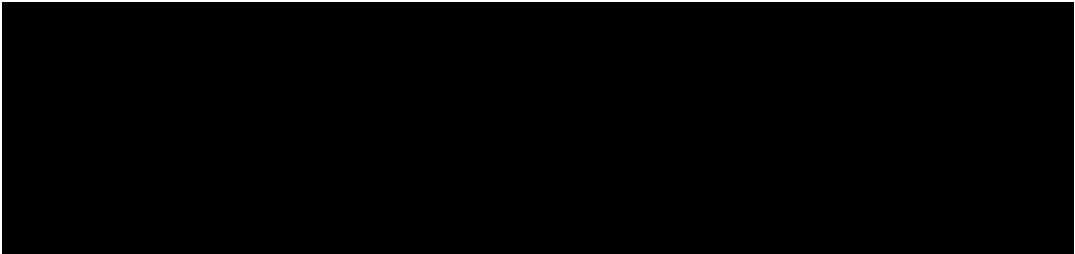
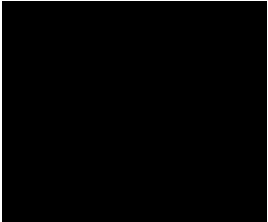
Industry & Sector Experience

US Federal and State Government
Non-Profit Organizations
Private Industry

Certifications

International Coach Federation - PCC Coach
Hogan Assessment
DISC Certified Trainer
Facilitator
GTCI Certified Team Coach
Brain-Based Coach Certification

Education



Jo Ann Lucero



Jo Ann Lucero, ICF Professional Certified Coach (PCC), brings 35 years of experience in human resources, employee relations, and conflict management to her role as Executive Coach. During her many years as a manager, certified mediator, and advisor to senior executives and military officers in the volatile areas of employee and labor relations, she gained a deep appreciation for the skills and abilities needed to influence the behavior of others in order to affect strategic change. Having served as an advisor to individuals at all levels of management from first line supervisors to senior executives, she understands the day-to-day responsibilities leaders have for putting into place short- and long-range strategic plans while balancing the vicissitudes of the workplace. As importantly, she understands the numerous challenges senior leaders and managers face as they attempt to manage and integrate operational resources to accomplish organizational goals in challenging multicultural and multigenerational work environments.

Having been a trusted advisor to many senior leaders during her career, Jo Ann has successfully transitioned this skill to her coaching clients. She coaches individuals in the Senior Executive Service within the Federal Government including the Department of Defense; senior leaders at the Office of the Comptroller of the Currency; and executives in private, for-profit and non-profit organizations. More recently serving as a leadership and executive coach to individuals in the financial advisory industry, she has gained an appreciation for the dramatic changes required of leaders as new business practices and requirements emerge.

She brings to her coaching an appreciation for the many distinctions between leading and managing. Jo Ann believes that leadership is a skill that is available to all individuals who have a desire and a willingness to build on their innate talents. She is adept at translating theory into practical application for her coaching clients and works with them to integrate emerging leadership practices and strategies efficiently and effectively. She also works with her clients to develop practices that can be integrated into a busy schedule that will enhance productivity in the workplace as well as contribute to their personal satisfaction. She serves her clients by helping them reach their stated goals in such a way that they become self-educating, self-generating, and self-restoring after the coaching relationship comes to a close.

Ms. Lucero worked with senior executives/leaders in Government that included Military Officers and private industry to build their capacity for self-awareness in order to change habits or develop habits to navigate the rapidly changing workplace. This work developed practices and exercises to integrate into their busy schedule that support work-life balance and business results. In addition to her previous career as a trusted advisor to senior Army Officers (LTC/COL), she has been engaged in leadership coaching with Army officers from Army Captain, promotable to Major to Colonel. The focus was building capacity around emotional intelligence and leveraging their curriculum as they prepared to serve as Brigade Commanders.

Areas of Expertise

Leadership & Executive Coaching
Leadership Development
Personal and Professional Transitions

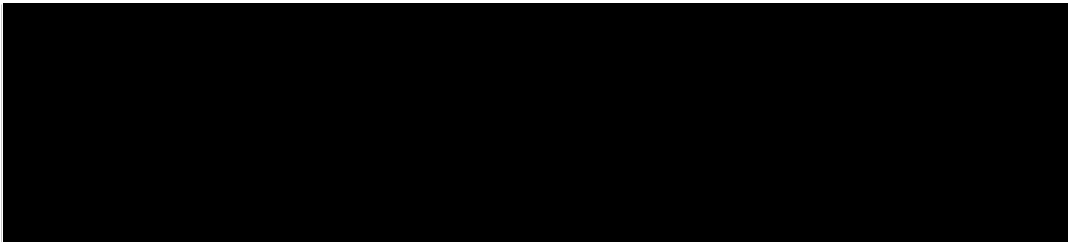
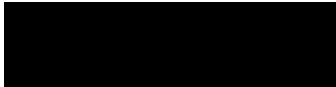
Industry & Sector Experience

US Federal and State Government
For Profit and Non-Profit Organizations

Certifications

International Coach Federation - PCC Coach
Hay Group ESCI Manager Edition
DiSC Profile
MBTI

Education



JERUSALEM T. HOWARD, Ph.D

Jerusalem partners with clients to create successful outcomes based on their established agenda. He has successfully coached clients to develop effective career transition strategies. He also coaches executives and professionals as they develop action plans to improve their effectiveness and performance. He specializes in supporting military to civilian clients with skills assessments and career planning.

As a Coaching Program Manager for several organizations, Jerusalem has worked with US Treasury Executive Institute, managing 200 coaches in the delivery of services to 40 federal departments. He also worked at the Department of Homeland Security where he:

- Designed, developed, and implemented an agency wide coaching program for 20,000 employees.
- Provided career coaching services for employees focusing on individual development plans, resume review, interview preparation and assessments.
- Conducted coaching feedback sessions for managers and executives using the Kouzes and Posner's Leadership Practices Inventory (LPI).
- Worked with executives to draft and review their Executive Development Plan.

Jerusalem has worked with public and private sector clients and partners. His recent coaching clients include Teach for America, Executive Development Program; American University, Key Executive Leadership Programs; Treasury Executive Institute, Office of Personnel Management, Presidential Management Fellows Program.

During his career, Dr. Howard has worked not only in the military, but also with law enforcement officers and agents. After graduating from the US Military Academy at West Point, Dr. Howard served honorably for 20 years. He retired at the rank of Major. He served in company, battalion staff level and other positions. He served as the Immigration and Customs Enforcement (ICE) Mentoring and Coaching Program Manager for 10 years. In this role Dr. Howard worked extensively with officers and agents to develop their leadership skills. He coached ICE personnel at all levels from GS 13 to Senior Executive Service (SES).

He is an active member of the Metro DC Chapter of the ICF and is the Membership Director. He is an Executive Coach for American University where he provides executive coaching services to Federal employees enrolled in leadership development programs.



Areas of Expertise

Leadership & Executive Coaching
Leadership Development Training

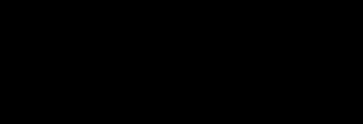
Industry & Sector Experience

US Federal and State Government
Non-Profit Organizations
Private Industry

Certifications

International Coach Federation - PCC Coach
University of Texas at Dallas, Graduate Certificate in Executive and Professional Coaching
Emotional and Social Competency Inventory (ESCI) Certification
Hogan Assessments
Leadership Circle Profile Certification
Leadership Practice Inventory (LPI) Coach Training
Gallup's Successful Strengths Coaching Program

Education



Lorri Manasse, Ph.D., PCC

Lorri Manasse has more than 25 years of experience in leadership development, executive coaching, organizational development, and change management. She helps organizations and their people adjust to rapidly changing and increasingly competitive environments, changing demographics, globalization, escalating customer expectations and emerging technology. Lorri helps executives and organizations integrate human aspects of leadership with strategic objectives and organizational performance.

In addition to her own coaching and consulting practice, since 2004 Lorri has been adjunct faculty at the Federal Executive Institute (FEI), the US government's premier leadership development training facility. There she facilitates small teams of FEI executives in an intensive, 4-week residential executive development program, coaching them both individually and in groups, facilitating experiential activities and simulations, and teaching coaching skills, leadership theory and concepts, and leadership in a constitutional environment.

Leadership and change have been recurring themes in Lorri's career. For example, over a 6 year period she designed and delivered leadership development at various levels in Dahlgren Division of NAVSEA. She assisted a top 3 bank in the design and deployment of a comprehensive leadership development architecture for more than 14,000 leaders world-wide. Lorri designed and coordinated a front-line leadership program for a county government; helped an international package goods corporation create a competency-based leadership development process; designed a change leadership program for administrators of all 5 campuses of a state-wide university system as they prepared to integrate their technology platforms. Earlier in her career Lorri managed a national research program on effective leadership at the National Institute of Education.

Lorri has coached more than 250 leaders across a wide range of commercial organizations, government agencies and non-profit organizations, including numerous senior executives, world wide, for the Agency for International Development. She has also worked on site with USAID missions in Africa, the middle east, and Latin America.

Prior to coming to Washington as a Senior Policy Fellow of the Institute for Educational Leadership, Lorri designed and directed an education/rehabilitation program for juvenile felons



Areas of Expertise
Leadership & Executive Coaching
Leadership Development Training
Team Coaching & Facilitating

Industry & Sector Experience
US Federal and State Government
Non-Profit Organizations
Private Industry

Certifications
PCC - ICF
CPCC (Certified Professional Coactive Coach)
Myers Briggs Type Indicator Interpersonal Leadership Styles (ILS)
Leadership Effectiveness Analysis (LEA)

Education

Kenneth Leahman

Kenneth Leahman is a Leadership, Team Alignment and Strategy Specialist who guides and motivates Leaders and Teams to achieve a “Mindset Reset” to adopt meaningful change through tangible tactics, techniques and procedures (TTPs).

Mr. Leahman is a bold personality with pin-point focus and tenacity with a compassion and sensitivity that results in tremendous self-discovery, significant "a-ha" moments, and expanded productivity for individual, team, business, and executive clients. He has an acute awareness of clients’ needs by having re-invented himself every 2-3 years to adapt to a new global location, work environment, team and leadership paradigm.

He is a unique combination of career experience, talent, dynamism, EQ, and intellect who is an empathetic, intuitive listener with a gift for getting to the issues that are holding clients and their team back. Leveraging this skill, he has demonstrated the ability to identify and eliminate pervasive and potentially derailing behaviors, and to motivate individuals, leaders and teams to reach their maximum potential. He has a passion for and competency in facilitation, mediation and conflict resolution and refuses to let clients stay in boxes that confine their purpose and destiny.

His influential leadership has been displayed as he has been a Coach for Leaders and Teams throughout multiple Federal Government Agencies. He has coached Senior Federal Government Leaders, Corporate Executive & Small Business Owners. His coaching practice has and continues to consist of members of the military leadership programs (BCAPs, ALCAPs), as well as homeland security, national forestry service (fire). He has taught, coached and mentored FBI and police in various departments across the country.

He served in Senior CIA leadership positions in Afghanistan, Europe, Middle East, South Asia and Domestic US; directed US National Security efforts with US and Foreign Militaries, Law Enforcement Agency Personnel, and 30+ Foreign Intelligence and Security Services.

He is an active member of the International Coach Federation (ICF), is the Director for Pro-Bono activities, and Co-Chair, of the Strategic Alliances Committee. He received his coaching certification from Co-Active Training Institute (CTI) and is a Professional Certified Coach (PCC). He is also a Certified Assessor with Wiley Catalyst DiSC® Suite, DiSC® 363, Five Behaviors of Cohesive Teams™, EQ 2.0, multiple US Government OPM 360 tools, and the Global Mindset Inventory (GMI).



Areas of Expertise

- Coach, Facilitator and Educator in 15+ federal agencies, corporations and 24+ countries
- Team Alignment, Strategy and Conflict Resolution Specialist
- Member, International Coach Federation (ICF)
- Assessment Tools: Catalyst DiSC® Suite; EQ 2.0; OPM 360s; GMI & GMI 360
- Integrity, Ethics and Values-Based Performance Expert
- 36 years National Security, Intelligence, Foreign Affairs and Strategic Operations in Middle East, South Asia, Europe & domestic US
- 18 Years Overseas; 75+ Countries; 50 US States
- US Marine Corps War College Graduate
- Skilled Virtual Instructor, e.g., Zoom
- Multi-lingual

Anna Alvarez Boyd

Anna Alvarez Boyd is an International Coach Federation (ICF), Associate Certified Coach (ACC), and the founder of Executive Horizons LLC. Anna has a passion for developing the next generation of leaders, and her coaching starts with the belief that every person has an innate wisdom that can be accessed through reflection and transformational leadership development. She supports her clients with a deeper self-discovery and a tailored approach that takes people on a journey to reintroduce themselves to their own power.

Anna was named a Top Coach in Orlando by Influence Digest because of her strong commitment to diversity, equity, and inclusion and her extensive experience as a senior leader during times of crisis, including 9/11, the Great Recession, and the COVID-19 pandemic. With over 25 years of executive leadership experience, Anna has led national policy initiatives, leadership development programs, and strategic planning efforts on a national level. Throughout her career, Anna has acted as an advisor for leadership development and DEI programs across government, corporate, and non-profit sectors, where she led housing, mortgage finance, and community development policy.

Anna most recently held the position of Senior Associate Director at the Federal Reserve Board, where she was responsible for directing consumer and community development research, policy, and programs in support of Federal Reserve policymakers. Anna's clients include Darden University Foundation, Ford School - University of Michigan, Raza Development Fund, Hogar Hispano LLC, and individual senior leaders with Federal Financial Regulatory agencies.

Anna has expanded her impact and her commitment to the next generation of leaders through her nonprofit, FairWays to Leadership. The innovative program, co-founded with her husband, is a leadership development program that serves women and diverse students. Started in central Florida in response to the COVID-19 pandemic and the racial reckoning in the summer of 2020, the program builds leadership skills through golf. Anna's expertise in community and economic development has bolstered the efforts of bringing an immersive leadership program to students on collegiate campuses across multiple states.



- Areas of Expertise
- Leadership & Executive Coaching
- Leadership Development
- Personal and Career Transitions
- DEI Programs
- Industry & Sector ExperienceUS
- Federal Financial Regulatory
- Colleges and Universities
- For Profit and Non-Profit Organizations
- Certifications
- International Coach Federation - ACC Coach – Georgetown University Transformation Leadership Coaching Program
- EQ-I 2.0
- 360 Assessments
- Coaches Rising - Neuroscience of Change

Education

Karen Benoy Preston



Karen Benoy Preston is a highly accomplished executive and team coach with an impressive track record of over 2000 coaching hours at renowned global organizations such as IBM, EY, Salesforce, Intuit, AMEX, and Ally Financial, spanning across the US, EMEA, and beyond.

Specializing in transformational coaching, Karen excels in partnering with top executives to cultivate cohesive cultures and high value-creating teams. Her expertise lies in empowering senior leaders to embrace a coach-like approach, enabling them to sustain performance and drive profitability in an increasingly chaotic world.

Karen's extensive coaching knowledge empowers her to unlock the full potential of her clients. Whether faced with organizational restructuring, leadership gaps, or a team on the brink of burnout, Karen intuitively understands the unique needs of individuals and teams, igniting transformation and fostering thriving environments.

Her achievements include coaching a team to discover their unique purpose, leading to securing funding and breaking away from a parent company associated with the US federal government. Additionally, Karen coached a Managing Director to ascend to a partnership role within a large tech consulting firm, showcasing her ability to propel individuals to new heights of success.

Furthermore, Karen has developed a powerful and proven values assessment tool for performance and increased profits. Her expertise has been recognized on a global coaching platform, where she achieved the status of Top Expert with consistent 5/5 ratings in programs focused on Leading Organizations for Senior Executives.

Karen has also facilitated multiple highly successful group coaching sessions, centered around career planning for top high-potential professionals at a leading global software security company. Her ability to challenge and inspire strategic thinkers in the C-Suite or those on the verge of C-level promotions sets her apart. She excels in cultivating strong relationships within organizations, fostering healthy culture habits, and driving essential changes to internal and external processes, resulting in enhanced efficiency and effectiveness. Karen finds her greatest fulfillment in helping top leaders realize their full potential, creating a ripple effect that permeates throughout the organization. By enabling individuals to reach their utmost capabilities, she fuels collective excellence, leading to high performance and increased profits.

Areas of Expertise
Leadership & Executive Coaching
Team and Group Coaching
Leadership Development
Training

Industry & Sector Experience
US Federal and State
Government
Non-Profit Organizations
Private Industry

Certifications
International Coach Federation -
PCC Coach
Global Team Coaching
Individual Accreditation (ITCA)
GTCI Certified Team Coach
WBECS, 2022
Institute for Professional
Excellence in Coaching
(iPEC)

Education
[Redacted]

Dr. Barrhonda White, PCC

Barrhonda's aim as a coach is to multiply greatness one leader, one team, and one life at a time. She recognizes that leaders are constantly on a stage and thus offers a safe and judgment free "backstage" for leaders. She offers a balance of asking insightful questions, exploring values, and unpacking beliefs that may be limiting. She also serves as an accountability partner for impactful transformation. Barrhonda helps leaders prepare to have personal and professional proud moments while yielding significant value for their respective organizations.

Barrhonda offers over twenty-two years of corporate business experience with a fortune 100 financial institution. She also offers 16 years of internal and external leadership coaching and facilitation experience. Her business experience includes operations leadership and process engineering. Barrhonda also serves as teaching faculty and executive coach for Virginia Commonwealth University's School of Business - Executive Graduate Programs. She also serves as instructor and Co-Program Director of the Executive Certificate in Leadership Coaching at Georgetown University's Institute of Transformational Leadership.

Coaching & Facilitation Client Sectors

- Banking / Financial Services
- Federal Government
- Auto manufacturing & Sales
- Insurance
- Transportation
- Hospitality
- Health Care / PhRMA
- Higher Education
- Technology
- Brand Marketing
- Retail
- Manufacturing Distribution

Coaching Specialization:

- Executives
- Emerging Leaders
- Identity
- Confidence
- Leadership Presence
- Interpersonal Dynamics
- Emotional Intelligence
- Communication
- Strategic Career Planning
- High Performing Teams
- Inclusive Leadership



Areas of Expertise

Executive Coaching
Emerging Leaders
Career Planning
Leadership Development
Training

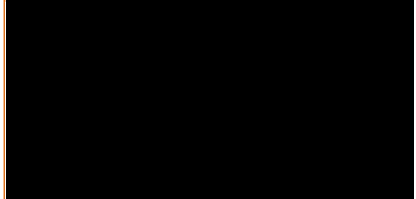
Industry & Sector Experience

US Federal and State
Government
Higher Education

Certifications

International Coach Federation -
PCC Coach
Georgetown University –
Certified Leadership Coach
Leadership Circle Profile
Hogan Assessment
Certified ICF PCC Marker Assessor

Education



CHELESE PERRY, PCC

Chelese Perry is an executive and leadership coach who is Passionate about supporting senior leaders and high- potential talent to strengthen their leadership skills to effectively navigate periods of significant change, including transitioning to higher levels of responsibility and managing increasingly complex business challenges.

Chelese has over 20 years' experience as a senior sales executive for Fortune100 organizations, including The Coca-Cola Company and Abbott Laboratories. She progressed throughout her career, guiding teams to design and implement sales, marketing, and business development programs as they partnered with clients. She is a trusted advisor, skilled coach, and facilitator known for her ability to synthesize and simplify complex issues and provide clarity to senior leaders and teams, supporting them to drive sustainable change and improved business and personal performance.

As a skilled and practiced facilitator, she quickly fosters trust and psychological safety. In addition, Chelese expertly creates welcoming and inclusive environments among groups with differing perspectives, experiences, challenges, and goals.

Chelese has a deep passion for community service. She serves as a volunteer coach for A Whole New Doctor (AWND). an organization designed to empower medical students to increase resilience and emotional intelligence through coaching and leadership training.

Her coaching philosophy is that executive coaching is designed for executives who must navigate an ever-changing workplace and organizational culture and engage and retain employees. The intense work focuses on individual executives within organizational strategy and their teams. Her custom approach pinpoints the attitudes, behaviors, and skills needed to lead teams and drive measurable results. She helps clients enhance and align their self-awareness, well-being, and emotional intelligence to amplify their skills and abilities, neutralize disempowering beliefs, and identify their North Star professionally and personally. She is committed to using her 20-plus years of experience to challenge, support, and set her clients up to win.

As a member of the Forbes Coaches Council, Chelese participates in expert panels and publishes leadership articles that appear on Forbes.com Council pages.



Areas of Expertise

Executive Coaching
Group Coaching
Leadership Development
Training

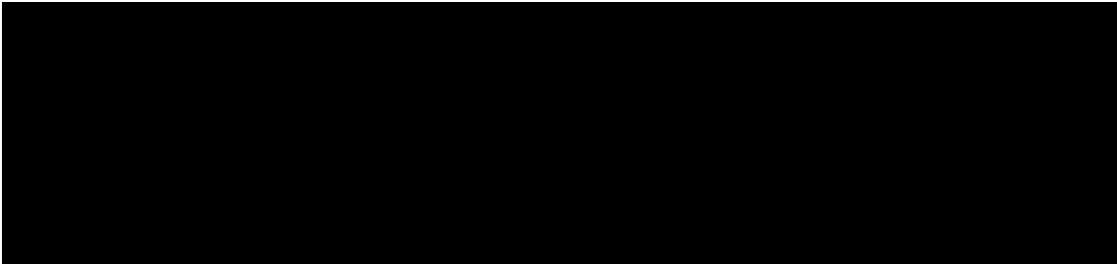
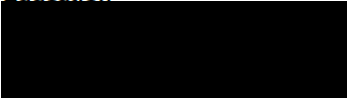
Industry & Sector Experience

US Federal and State
Government
Non-Profit Organizations
Private Industry

Certifications

International Coach Federation -
PCC Coach
George Mason – Certified
Leadership Coach
DiSC Certified Facilitator and
Practitioner Trainer
Certified Group Coach – Verve
Coaching

Education



Gregory L. Davis

Gregory L. Davis is a PRM Principal and Practice Leader responsible for client consulting services. He has more than 20 years of client project, subcontractor, and quality assurance management for client deliverables, including schedules, budgets, and client satisfaction. He is very familiar with the court system having served as Merit Panelist for the District of Columbia Court System multiple times.

Davis has significant project, contract administration, quality assurance and subcontractor management experience for educational institution is implemented for client consulting projects, deliverables and client satisfaction. He implements quality control practices without targeting a specific industry, technology, vendor, or governance standards that clients consistently find helpful and satisfying. The standard he will deploy for the United States Department of Agriculture (USDA), Economic Research Service (ERS), Information Services Division (ISD) will include quality engagement life cycle methodologies that adhere to PRM's practices and protocols—i.e., detailed planning with schedules, client progress meetings, metrics, and peer review of all deliverables.

He will conduct reviews and assessments to manage uncontrollable project activities or situations that could result in adverse consequences to the United States Department of Agriculture (USDA), Economic Research Service (ERS), Information Services Division (ISD) project performance, schedules. Davis will manage contingency plans for all PRM team members assigned to the United States Department of Agriculture (USDA), Economic Research Service (ERS), Information Services Division (ISD) project to include facilitation of any risk—i.e., staff replacement, ad hoc meetings, and any risk mitigation resolutions, if needed. Davis has tools and processes to manage project constraints of funding, time, and resources as he has for the University of North Carolina at Chapel Hill, Georgetown University, Morehouse, and Montgomery Community College.

Davis has demonstrated experience developing, managing, tracking, and taking corrective actions. He has experience measuring project progress against the task duration and client changing requirements. His quality assurance tools, processes, models, and quality analytics have been successfully deployed for engagements ranging from 25 employees to organizations with more than 60,000 employees.



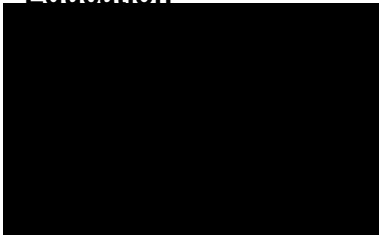
Areas of Expertise

Project Management
Quality Assurance
Subcontractor Management
Practices

Certifications

Capability Maturity Model
QA Certification

Education



COACHING TOOL SAMPLE



Employee	
Manager	
Department	
Current Position	
Time in Position	
Time with VT	
Date	

VT is undertaking a coaching initiative. What skills/tools/training do you need to stay ahead of the curve during this initiative?	
--	--

Fill in the following information to create a plan that will take you step-by-step toward your ultimate career goal.

Pinnacle Job

Where do you see yourself at the pinnacle of your career? Describe the position, the agency, the company, or industry and the intangibles that make this your dream job.

Next, articulate why this position is ideal for you. How does it match your skills, strengths and interests? How does it challenge you? What do you bring that will be of value? Why are you the right person to succeed in this role? Note: you probably do not have the experience or skills to fill this job now, but you can make some assumptions about the future, based on your current career interests and your background.

What qualifications are you missing? Write down any specific experiences, educational credentials, or other qualifications that are essential (or highly desired) for the pinnacle job you are envisioning.

Path to the Pinnacle

Next, map out the anticipated steps from your current job to your pinnacle job.

Current Job Title/Industry _____

Next Job Objective—*Write down the position title and any preferences for specific industries and/or companies.*

Rationale—Why does this step make sense? What does this position offer that will help you reach the step after that and, ultimately, your pinnacle job?

Targeted Date for Next Position	_____			
New	Skills	and	Experience	Required

Plan for Achieving Required Skills and Experience

Additional	Education	Required
------------	-----------	----------

Plan for Achieving Required Education

Repeat the above section for EACH job change you anticipate making to reach your pinnacle job:
Next Job Objective—Write down the position title and any preferences for specific agency, non-for-profit and/or companies.

Rationale—Why does this step make sense? What does this position offer that will help you reach the step after that and, ultimately, your pinnacle job?

Targeted Date for Next Position				
New	Skills	and	Experience	Required

Plan for Achieving Required Skills and Experience

Additional		Education		Required
------------	--	-----------	--	----------

Plan for Achieving Required Education

Next Job Objective—Write down the position title and any preferences for specific agency, non-for-profit and/or companies.

Rationale—Why does this step make sense? What does this position offer that will help you reach the step after that and, ultimately, your pinnacle job?

Targeted Date for Next Position				
New	Skills	and	Experience	Required

Plan for Achieving Required Skills and Experience

Additional		Education/Training	Required
------------	--	--------------------	----------

Plan for Achieving Required Education/Training

Follow-up Meeting Date and Place:	
--	--

Questions? Contact us!

Executive Coach	Executive Coach	Executive Coach
-----------------	-----------------	-----------------

EXECUTIVE COACHING INFORMATION SHEET

The information you provide below will be used to identify potential executive coaches who can work with you to reach your goals and objectives.

Please return this form with any questions.

Name:
Title:
Division:
Extension:
What do you hope to accomplish through the executive coaching program?
Is there a preferred area of expertise you would like in an executive coach?
List any relevant assessments that you would like to provide to the executive coach (i.e., 360-degree feedback). If you do not have any, would you like an assessment?
Is there anything else to consider when identifying potential coaches for you?

COACH SELECTION FORM

This form is to be used when interviewing potential coaches.

Coach Name: _____ Date: _____

Selected Questions	Notes
What experience do you have in coaching mid- and senior level staff?	
What steps would we follow and how would you determine whether our coaching experience has been successful?	
What types of clients do you work with most effectively? Least effectively?	
How much do you know about the culture of the VT?	
Have you personally been through the challenges I have identified?	
Why should I select you as my coach?	
Tell me about your best and worst coaching experiences.	

Your Questions	Notes

Assessment Ratings (Check appropriate boxes)

Characteristics	Not Applicable	Poor	Fair	Good	Excellent
● Background/ Credentials					
● Executive Coaching Experience					
● Coaching Style and Approach					
● Expertise and Preferences					
Overall Rating					

ADDENDUMS

PRM has included a signed and dated Submission Instruction Page and acknowledges receipt of Addendum 1.pdf and Addendum 2.pdf as directed in RFP Section VII Proposal Preparation and Submission.



Case Study: Executive Coaching for Leadership Growth

Background

Dr. Alex Carter, an experienced faculty member, was recently appointed as Chair of the Department of Sociology. While Dr. Carter brings a strong academic background to the role, they have limited formal leadership experience. To support a successful transition, leadership coaching has been identified as a strategic investment.

Identified Challenges:

- Lack of prior leadership experience, contributing 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

Program Overview:

This six-month coaching engagement is designed to equip Dr. Carter with essential leadership skills and confidence. The program integrates individual coaching, assessments, leadership tools, and applied strategies tailored to the higher education context.

Program Objectives:

- Build confidence in leadership and decision-making
- Enhance faculty engagement and collaboration
- Improve time management and delegation
- Strengthen conflict resolution and strategic planning skills
- Promote a cohesive, inclusive departmental culture

Program Components:

- Initial Assessment and Goal Setting
- Leadership Style Assessment (e.g., EQ-i 2.0, DiSC, or Leadership Circle Profile)
- Stakeholder Input (optional short-form 360 or colleague interviews)
- Kickoff Session to review results and set goals
- Deliverable: Individualized Leadership Development Plan
- Biweekly One-on-One Coaching (12 Sessions)

- 60-minute virtual sessions over six months
- Customized session content aligned to goals and real-time challenges

Focus areas may include:

- Delegation frameworks and time optimization
- Faculty trust-building and team engagement
- Conflict resolution strategies and difficult conversations
- Navigating university politics and influence-building
- ***Deliverable:*** Session summaries and development assignments

Just-in-Time Support:

- Unlimited email support between sessions
- Optional quick check-in calls for time-sensitive issues
- Midpoint Progress Review (Month 3)
- Review progress against the development plan
- Adjust focus areas as needed

Final Impact Review and Transition Planning

- Reflection on growth, outcomes, and leadership identity
- Finalized toolkit for continued leadership success
- Optional feedback summary for supervisor (if appropriate)

Additional Resources

Leadership tools and templates (e.g., delegation matrix, meeting planning guides) custom coaching playbook for academic department chairs.

Sample Pricing

Item: Leadership Coaching and Development Plan for Dr. Alex Carter

Description: Provide a comprehensive development plan for Dr. Alex Carter that will equip them with the necessary tools to leverage their strong academic background and effectively transition into a leadership role. The Leadership Coaching Program would include six (6) months of coaching sessions (two 1-hour sessions per month), One (1) Assessment, pre/post-session planning by the coach, resources, and between-session coach support.

Amount: Fix-Price; \$7,500 (Lump Sum)

Note: Additional coaching beyond the six-month engagement is available upon request at an hourly rate per session.

Why This Approach Works

This coaching engagement offers a structured yet flexible approach, enabling Dr. Alex Carter to build critical leadership capabilities while actively managing the demands of their new role. The personalized support ensures that development is practical, relevant, and immediately applicable- leading to improved decision-making, stronger departmental relationships, and long-term leadership success.

Prepared by: PRM Consulting Inc.; Contact Information: Gregory Davis, Principal; April 9,2025



April 9, 2025

Ms. Angela Caldwell, VCO, CUPO, Buyer Senior
Virginia Tech I Procurement
North End Center
300 Turner Street Suite 2100
Blacksburg, VA 24060

Subject: Responses to Leadership Coaching Negotiation Questions

VIA EMAIL: I acaldwell@vt.edu

Ms. Caldwell,

Thank you for the opportunity to respond to your Leadership Coaching Negotiation Questions. Our responses are organized to closely align with your negotiation questions.

Company Background & Experience

1. What industries do you specialize in?

PRM Consulting, Inc. (PRM) specializes in supporting a diverse range of sectors, with a strong focus on mission-driven organizations. Our experience includes working with institutions of higher education institutions, not-for-profit, philanthropic foundations, federal and state governments.

PRM understands the unique cultures, compliance requirements, and operational challenges within these sectors, and we tailor our coaching, facilitation, and leadership development services accordingly. Our team brings deep expertise in navigating complex stakeholder environments, supporting leadership in academic institutions, public service roles, and aligning individual development with actionable impact.

Team PRM has highly rated past performance working across diverse sectors. See Exhibit on the next page listing a representative sample of clients that we have worked collaboratively with over the years—a PRM hallmark.

Exhibit- Representative Client List

Public Sector/Government

U.S. Library of Congress
U.S. Department of Commerce
U.S. Department of Energy
U.S. Environmental Protection Agency
U.S. Census Bureau
U.S. National Telecommunications
Information Agency
U.S. International Trade Administration
U.S. National Oceanic and Atmospheric
Administration
U.S. Federal Aviation Administration
City of Atlanta
City of Milwaukee
City of Baltimore
City of Niagara Falls
District of Columbia
FEMA
Federal Reserve Bank
Montgomery County
State of Maryland
Walter E. Washington Convention Center
Washington Airport Authority

Health & Social Welfare

American Cancer Society
American College of
Emergency Physicians
American Diabetes Association
American Heart Association
American Kidney fund
American Lung Association
American Red Cross
Blood Systems
Crohn's & Colitis Foundation
National Childhood Cancer
Foundation
Easter Seals
Huntington's Disease Society
Kidney Cancer Association

Professional

American Academy of
Dermatology
American Academy of
Ophthalmology
American Academy of
Pediatrics
American Dietetic Association
American Medical Association
American Thoracic Society

Education

Capitol Hill Day School
District of Columbia Public Schools
Episcopal School of N George
Washington University
Georgetown Day School
Georgetown University
Grambling State University
Holton-Arms School for Girls
Howard University
Kingsbury Center
Morgan State University
National Cathedral School for Girls
National School Boards Association
Norwood School
Tuskegee University
Penn State University
Virginia Commonwealth University
UNC-Chapel Hill
University of Maryland
University of Virginia

Ms. Angela Caldwell, VCO, CUPO, Buyer Senior
Virginia Tech I Procurement
3 | Page

2. Can you provide case studies or testimonials from past clients?

Yes, see attached as provided in the proposal response.

3. How do you ensure your coaches stay up to date with the latest leadership trends and best practices?

All coaches offered as part of this contract are ICF certified coaches, most at the PCC level. An ICF Credential is a professional certification indicating that you have completed a rigorous credentialing process designed to develop and refine your coaching skills, and is a pledge to uphold the highest level of professionalism, ethical standards, and continuous development. It's recognized and respected by coaching clients worldwide. All coaches are required to participate in a recertification process that includes: (1) attending ICF-accredited programs or Continuing Coach Education (CCE) providers to ensure their training meets ICF standards, including ethics training, and (2) mentor coaching. Coaches have previously taken and passed the ICF credentialing exam.

Coaching Approach & Methodology

4. What coaching methodologies do you use?

Coaches we will assign use a blend of evidence-based coaching methodologies tailored to the client's goals and organizational context. These often include:

- **Strengths-based coaching** – helping clients identify and leverage their natural talents and strengths for greater impact.
- **Cognitive-behavioral techniques** – exploring and challenging limiting beliefs to foster mindset shifts and behavioral change.
- **Solution-focused coaching** – guiding clients to clarify goals, identify resources, and take action toward desired outcomes.

In addition, we sometimes incorporate assessment data (e.g., 360 feedback, personality or behavior profiles, leadership circle, and other proprietary and instruments) to help clients gain deeper self-awareness and target their development effectively.

Ms. Angela Caldwell, VCO, CUPO, Buyer Senior
Virginia Tech I Procurement
4 | Page

5. Do you offer a structured coaching framework, or is it customized for each client?

Our coaching framework starts with understanding the client's needs. A contract is established between the coach and coachee that shapes the development goals. We also offer Group/Team Coaching (workshop facilitation) to accomplish a particular need that has been expressed by the team's manager.

6. How do you tailor your coaching to align with an organization's goals and culture?

The individual coaching engagement starts with a discussion with the manager(s) of participants to be coached in order to understand the issues or the goals for the engagement. The individual coaching engagement starts with a discussion with the manager(s) of participants to be coached in order to understand the issues or the goals for the engagement. At this stage, the organization's broader goals and culture are also explored to ensure alignment and to provide context for the coaching process. To further insure alignment, executive coaching can also be successful as a three-way partnership among coach, executive, and the executive's organization. Each partner has an obligation and responsibility to contribute to the success of the coaching process.

Although the primary work is between executive and coach, coaching is always an organizational intervention and, as such, should be conducted within the context of the organization's goals and objectives. An engaged client's manager can help the coach understand what has prompted the organization to invest in coaching the client - helping coach and client shape the coaching engagement. It is therefore possible, when recommended by the coachee, that the manager participates in the first session or as an option.

The client's manager has a unique opportunity to help the coach understand and identify what success looks like for the client. By asking the client's manager what the client is strong at and what needs to be done to improve, we can explore what the client needs to achieve and/or to be better perceived as successful. Together they collaborate and co-create to define goals and objectives for both the individual and the organization.

7. Do you offer a structured coaching framework, or is it customized for each client?

As part of our contract with the organization, PRM/TMC provides the client with a 6 and 12-month evaluation designed to measure the impact of coaching on individual growth and organizational goals. These evaluations gather feedback from the client, coach, and, when

Ms. Angela Caldwell, VCO, CUPO, Buyer Senior
Virginia Tech I Procurement
5 | Page

appropriate, the client’s supervisor to assess progress toward coaching objectives, behavioral changes, and the overall effectiveness of the coaching engagement. Insights from the evaluations help demonstrate ROI and inform any adjustments needed to strengthen the program.

8. Do you provide one-on-one coaching, group coaching, or both?

We provide both one-on-one and group coaching as well as team coaching.

9. What assessments or tools do you use in your coaching process (e.g., 360-degree feedback, personality assessments, etc.)?

Our assessments and tools are determined based on the organizational needs. We offer the following: DiSC on Catalyst; EQi; StrengthsFinder; OPM 360; Leadership Circle; MBTI; Hogan, Leadership Circle Profile and other assessments if requested.

Customization & Flexibility

10. How do you tailor coaching programs to meet the specific needs of individuals and organizations?

Please see the response to number 6 above.

11. How do you handle different leadership levels (executive, mid-level, emerging leaders)?

Our coaching approach is intentionally customized to address the unique needs and priorities of leaders at various levels within the organization—executive, mid-level, and emerging leaders.

- **Executive leaders:** coaching is designed to support strategic thinking, organizational influence, and navigating complex challenges. These engagements often serve as a sounding board for critical decisions, leadership presence, and aligning individual leadership with enterprise-wide goals.
- **Mid-level leaders:** coaching focuses on strengthening the ability to lead teams, collaborate across functions, and execute strategy effectively. Emphasis is placed on managing up, down, and across, enhancing communication skills, and leading through others.

Ms. Angela Caldwell, VCO, CUPO, Buyer Senior

Virginia Tech I Procurement

6 | Page

- **Emerging leaders:** the coaching process supports the transition from individual contributor to leader. Sessions often center around building self-awareness, confidence, and core leadership competencies to help these individuals step into leadership roles with clarity and effectiveness.

In summary, our coaches align individual development goals with organizational priorities, ensuring that each engagement contributes to both personal growth and overall business impact.

12. Are there any additional resources or support provided between coaching sessions?

Coaches will provide the following support to all coachees between coaching sessions:

- Goal setting discussion
- Texting/WhatsApp support in between sessions
- Books, journal articles, podcasts
- Emergency ZOOM/TEAMS calls as needed

Coach Selection & Matching Process

13. How do you match coaches with clients?

Coaching is most successful when both parties are able to build trusting relationships. Style and approach are important elements to building this trust quickly. Connecting is an important competency and key to establishing and sustaining the coaching relationship. The agreements are revisited throughout the engagement as an ongoing process of discovery and adjustment. The formal coach matching process we plan follows:

- **Task 1:** Once a request for executive coaching services is received, the coachee is sent an Executive Coaching Information Sheet. The form will be used to identify potential executive coaches who can work with the coachee to reach their goals and objectives (*see COACHING TOOL SAMPLE section in original Proposal*).
- **Task 2:** The Information Sheet is returned, a review is made of the coaching requirements against the qualifications/education, etc., of the coaches available.
- **Task 3:** Two coach bios/resumes are selected and forwarded to the coachee for review and evaluation. The coachee reviews the bios/resumes, then schedules an interview with the coaches. Following selection, the coach meets with the participant

to establish a coaching agreement that: clarifies roles, responsibilities, and boundaries; identifies goals and objectives.

14. Can clients choose or switch coaches, if needed?

Yes, clients can request and change coaches if needed. We believe that the coaching relationship is a critical factor in a client's growth and success. If the fit doesn't feel right—for any reason—we encourage clients to speak with the program manager to explore other options. This flexibility ensures that clients feel comfortable, supported, and fully engaged in the process, which ultimately leads to better outcomes and a more meaningful coaching experience.

15. What is the average experience levels of your coaches?

100% of the coaches we plan for this engagement will have over 10 years of coaching experience.

16. Do your coaches have experience coaching leaders in higher education?

The PRM Team has experience coaching leaders in several higher education institutions. We have had contracts with the University of North Carolina at Chapel Hill, Virginia Commonwealth University, Georgetown University, University of the District of Columbia, Grambling, Tuskegee, Boston University. PRM holds an agreement with the University of Virginia that includes executive coaching, leadership development, and other strategic services valid through 2028. Several of our coaches are also adjunct faculty members at Georgetown University and George Mason University.

17. How do you handle situations where the coaching relationship isn't working?

Each coaching engagement employs a program manager who oversees the coaching program and performs quality assurance roles. If for some reason the coaching relationship is not working, the client is encouraged to contact the program manager to discuss their concerns confidentially. The program manager will work with both the client and the coach to explore the issue, identify potential solutions, and, if necessary, facilitate a transition to a different coach to ensure the client receives the support they need.

Ms. Angela Caldwell, VCO, CUPO, Buyer Senior
Virginia Tech I Procurement
8 | Page

Logistics & Pricing

18. What is the typical duration of a coaching engagement?

Coaching durations vary from 3 to 12 months. A work order is assigned a specific number of approved sessions. PRM highly recommends not less than 3 months of coaching services.

19. How frequently do coaching sessions take place?

We recommend the industry (best) practice of coaching sessions that occur in two (2) one-hour sessions per month.

20. What are your pricing models (e.g., per session, retainer, project-based)?

We offer session rates as well as fixed-term pricing where the number of sessions per month can vary slightly.

21. Are there any additional costs, such as assessment fees or materials?

Assessment fees are additional and vary based on the assessment chosen by the customer.

Results & ROI Measurement

22. How do you track and report progress for individuals and organizations?

Some prior clients who have provided several participants in their work order have requested a monthly attendance report that shows dates coaching sessions were held which provides tracking of the number of sessions conducted and the number of approved sessions remaining per participant.

23. Can you share examples of measurable improvements achieved by your clients?

The following testimonials from our clients and partners offer independent validation of our organization's proven capabilities, commitment to excellence, and measurable impact.

- As a demanding client, we knew we would reap the benefits of continuing outstanding service by TMC, with Ms. Thomas herself again at the helm as a skillful hands-on project manager.
- PRM's extraordinary level of commitment and attention to detail again ensured the project was completed on time, within budget, and to the satisfaction of all stakeholders.

24. What role does feedback play in your coaching process?

Feedback is a critical component of our coaching engagements and is strategically integrated at multiple stages to ensure the program meets both individual and organizational objectives.

At the start of each engagement, we work with clients to identify key development goals, often using tools such as 360-degree feedback assessments, stakeholder interviews, or surveys to establish a baseline and uncover growth opportunities. This initial feedback helps inform a tailored coaching plan aligned with the organization's strategic priorities.

Throughout the coaching engagement, our coaches provide ongoing, real-time feedback to participants, reinforcing strengths, identifying patterns, and supporting behavior change. We also encourage coachees to seek feedback from their colleagues and supervisors, which helps embed learning into daily practice and creates accountability.

In addition, we actively solicit feedback from coaching participants and program sponsors to assess satisfaction, progress, and impact. This input allows us to make timely adjustments to our approach and ensures transparency and alignment throughout the engagement.

Our structured, feedback-driven process ensures that coaching is both individualized and scalable, delivering measurable outcomes for the organization and meaningful growth for each participant.

25. What role does feedback play in your coaching process?

We offer post-coaching follow-ups and ongoing development support as an optional service, available at an additional cost. These services are designed to reinforce learning, support long-term behavior change, and sustain momentum beyond the initial coaching engagement.

Options may include periodic check-in sessions, customized development plans, accountability partnerships, targeted skill-building workshops, or access to curated resources and tools. We can tailor these follow-up services to align with the organization's goals and the individual's continued development needs.

We are happy to work with clients to scope the appropriate level of post-coaching support and include it as part of the overall program design and pricing structure.

Case Study, Procurement Standard Negotiation Questions, W-9 and Certificate of Insurance

PRM has elected to respond to Case Study, Procurement Standard Negotiation Questions, W-9 and



Ms. Angela Caldwell, VCO, CUPO, Buyer Senior

Virginia Tech I Procurement

10 | Page

Certificate of Insurance in separate documents. Please refer to documents with filenames of PRM Case Study-Response, PRM Procurement Standard Negotiation Questions-Response, PRM W-9 and PRM COI.

In conclusion, we hope our responses are responsive to your questions. I can be contacted directly on 202-745-3700 for any questions you may have. And thank you for considering the PRM Team for your executive coaching needs.

Sincerely,

A handwritten signature in black ink, appearing to read 'G. L. Dais', with a horizontal line extending from the end of the signature.

Gregory L. Dais
Principal



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.

Response: PRM warrants and assures VT that there is nothing included in the PRM team proposal that would be used to identify or harm a person's identity, finances or personal information. No redactions to our proposal are required.

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 cooperative 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.

Response: If or when a transition of service to another provider is required, the PRM Team is willing to establish a transition plan alongside the new provider of service which may include but not be limited to sharing important non-proprietary data and/or existing service information via a cooperative knowledge transfer process to the extent directed and approved by Virginia Tech. PRM would require compensation for the time by resource category to provide the requested transition plan and turnover.

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.

Response: PRM offers VT the following discounted best and final pricing terms. We reduced the fee by 10% for the Virtual coaching rates for MCC and ACC coaches. We have also included an additional assessment for Everything DiSC 360 Catalyst as an optional assessment. See highlighted areas in pricing table.

Virginia Tech Leadership Coaching Services Cost Proposal					
Individual Leadership Coaching, Group Coaching, Workshops & Development, Assessments, Ongoing Support					
Item #	Deliverable	Unit Measure	Virtual	In Person	Payment Invoiced
VI.1	Individual Leadership Coaching				
	MCC Credentialed Coach	Hour	\$495	\$660	Monthly
	PCC Credentialed Coach	Hour	\$375	\$450	Monthly
	ACC Credentialed Coach	Hour	\$293	\$390	Monthly
	Recommendation is for two (2), one (1)-hour Coaching Sessions per Client per month. Allocation for Prep/Post hours is one-half the number of the approved Coaching hours. <i>Prep/Post hours are billable at the same rate.</i>				
VI.1 Options	Individual Leadership Coaching (Virtual Only) Fixed-Duration Options (See Section: VII.A.3 Proposed Deliverables)				
	Three (3) Months (Proposal is for two (2), one (1)-hour Coaching Sessions per Client per month.)	Fixed Per Participant	\$3,000	N/A	Proportion Monthly
	Six (6) Months (Proposal is for two (2), one (1)-hour Coaching Sessions per Client per month.)	Fixed Per Participant	\$6,000	N/A	Proportion Monthly
	Twelve (12) Months (Proposal is for two (2), one (1)-hour Coaching Sessions per Client per month.)	Fixed Per Participant	\$12,000	N/A	Proportion Monthly
VI.2	Group/Team Discovery, Diagnosis & Design (Virtual or DC Satellite)	Session	\$4,000	\$4,800	Month After Acceptance
	Conduct Initial Exploratory Discussions (Virtual)				
	Ensure Clear Expectations for the Engagement				
	Program Design and Development; Delivery/Presentation				
VI.3	Group/Team Coaching Workshops (Virtual or DC Satellite) (See Assessment Options Table Below)	Session	\$5,000	\$6,000	Month After Acceptance
	Virtual Working Session with the team				
	Review of survey results and team assessment debrief				
VI.5	Ongoing Support & Accountability				
	MCC Credentialed Coach	Hour	\$495	\$660	Monthly
	PCC Credentialed Coach	Hour	\$375	\$450	Monthly
	ACC Credentialed Coach	Hour	\$293	\$390	Monthly
Virginia Tech Leadership Coaching Services Cost Proposal					
Program / Project Management					
Item #	Deliverable	Unit Measure	Unit Price		Payment Invoiced
VI.5.Pgrm	Program / Project Management				
	Program Management	Hour	\$400		Monthly
	Project / Resource Management	Hour	\$300		Monthly

Virginia Tech Leadership Coaching Services Cost Proposal				
Assessment Options				
Item #	Deliverable	Unit Measure	Unit Price	Payment Invoiced
VI.4	Assessment Options			
	Eq-i and EQ 360 Assessment	Assessment	\$350	Month After Completion
	Team and Group Coaching International	Assessment	\$350	Month After Completion
	Global Team Team Coaching Institute	Assessment	\$350	Month After Completion
	Leadership Circle Profile	Assessment	\$575	Month After Completion
	Hogan	Assessment	\$350	Month After Completion
	True Colors	Assessment	\$300	Month After Completion
	Strength Finders	Assessment	\$300	Month After Completion
	Meyers-Briggs Type Indicator	Assessment	\$300	Month After Completion
	Wiley Everything DiSC 360 Assessments (Catalyst Platform: Workplace)	Assessment	\$100	Month After Completion

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?

Response: Yes, PRM agrees to provide monthly invoices with payment due thirty (30) days after receipt of invoice or goods/services

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?

Response: Yes, PRM agrees 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.

6. Virginia Tech Question: If awarded a contract, are you willing to hold prices firm for the initial contract period?

Response: Yes, PRM is willing to hold prices firm for the initial contract period.

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?

Response: TMC is registered in the eVA procurement system and the PRM Team is willing to participate in the eVA internet procurement solution described in the terms and conditions of the RFP.

8. Virginia Tech Question: Are the prices for all goods/services listed in your proposal inclusive of all applicable eVA system transaction fees?

Response: Yes

9. Virginia Tech Question: Will your company agree to participate in the Wells One AP Control Payment System?

Response: Yes

10. Virginia Tech Question: Do you agree that the initial contract period shall be 1 year?

Response: 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?

Response: Yes; we agree that the contract may be renewed by Virginia Tech upon written agreement of both parties for four (4) one-year periods, under the terms of the current contract.

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?

Response: Yes

13. Virginia Tech Question: How soon after contract award can you begin providing services?

Response: Within 30 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?

Response: 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?

Response: 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?

Response: Yes. TMC, a team member of PRM Team is currently a certified SWaM vendor with the Virginia Department of Small Business and Supplier Diversity and will maintain that certification throughout the term of this contract.

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.

Response: Attached files.