



Purchasing Department
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 Fairfax, Va. 22030
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<http://fiscal.gmu.edu/purchasing>

STANDARD CONTRACT GMU-1836-23-01

This Contract entered on this 19th day of September, 2023 (Effective Date) by Washington Coaching Group LLC hereinafter called "Contractor" (located at 340 Sunset Drive #1611 Fort Lauderdale, FL 33301) and George Mason University hereinafter called "Mason," or "University".

I. WITNESSETH that the Contractor and Mason, in consideration of the mutual covenants, promises and agreement herein contained, agree as follows:

II. SCOPE OF CONTRACT: The Contractor shall provide experienced and certified coaching service administrators for George Mason University as set forth in the Contract documents.

III. PERIOD OF CONTRACT: One year from the Effective Date with four (4) successive one-year renewal options.

IV. PRICE SCHEDULE: The pricing specified in this section represents the complete list of charges from the Contractor. Mason shall not be liable for any additional charges.

Travel will only be paid on a reimbursement basis and in accordance with Mason's policies, <http://fiscal.gmu.edu/travel/>, and GSA per diem rates.

WCG Coaching Vendor Administration Fee structure outlined below:

- 150-199 sessions = \$3000
- 100-149 sessions = \$2500
- 50-99 sessions = \$2000
- 5-49 sessions = \$1000
- 1-hour overview of coaching to participants/introduction of coaches: \$337.50

• \$337.50/hr* ACC/PCC/MCC-level coaches in non-specific coaching requirement Executive Education Programs

• \$437.50/hr MCC-level coaches in specified MCC only coaching requirement Executive Education Programs

Director of Coaching Education

\$23,000 for the MCC for the Leadership, Coaching for Organizational Well-Being program per virtual and in-person cohort. Travel costs will be reimbursed for in-person deliveries

rates of \$20,000 for the MCC for the Masterful Coaching Course and \$12,000 for the Co-Instructor provided by Washington Coaching Group

Mason agrees to offer the MCC program with 10-12 participant with 2 MCC faculty.

If there are 13, 14, or 15 participants, Mason will offer WCG \$2,000 per participant.

Mason reserves the right to determine course availability and feasibility for enrollments less than 10 participants. Final course availability and feasibility will be determined 2 weeks (or 10 business days, whichever is closer to the start-date) before the expected course start date. Mason reserves the right to make the sole decision regarding course running, availability, and feasibility.

*Sept and Dec. 2023 Amtrak Cohort pricing will continue under previous contract pricing as agreed to Sept. 12, 2023 via phone and confirmation email. SOWs to be signed will reflect prior contract pricing.

V. CONTRACT ADMINISTRATION: Sonya S Henry shall serve as Contract Administrator for this Contract and shall use

all powers under the Contract to enforce its faithful performance. The Contract Administrator shall determine the amount, quality and acceptability of work and shall decide all other questions in connection with the work. All direction and order from Mason shall be transmitted through the Contract Administrator, however, the Contract Administrator shall have no authority to approve changes which shall alter the concept or scope or change the basis for compensation.

VI. METHOD OF PAYMENT: Paymode-X, Net30. <http://www.paymode.com/gmu>. Contractor shall submit invoices directly to acctpay@gmu.edu with a copy to the Contract Administrator. Invoices will be paid Net 30 after goods received, services rendered, or receipt in Mason's Accounts Payable email box, acctpay@gmu.edu, whichever is later. Invoices must reference a Purchase Order number to be considered valid.

VII. THE CONTRACT DOCUMENTS SHALL CONSIST OF (In order of precedence):

- A. This signed Contract;
- B. Negotiation Responses 9/12/23, 8/30/23, 8/17/23 (attached);
- C. RFP No. GMU-1836-23, in its entirety (attached);
- D. Contractor's proposal dated July 5, 2023 (attached).

VIII. GOVERNING RULES: This Contract is governed by the provisions of the Restructured Higher Education Financial and Administrative Operations Act, Chapter 10 (§ [23.1-1000](#) et seq.) of Title 23.1 of the Code of Virginia, and the "*Governing Rules*" and the *Purchasing Manual for Institutions of Higher Education and their Vendors*. Documents may be viewed at: <https://vascupp.org>.

IX. CONTRACT PARTICIPATION: It is the intent of this Contract to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or affiliated corporations may access this Contract if authorized by the Contractor.

Participation in this Contract is strictly voluntary. If authorized by the Contractor, the contract will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this Contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of the contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The University may request the Contractor provide semi-annual usage reports for all entities accessing the Contract. The University 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 the University 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 needed.

X. STANDARD TERMS AND CONDITIONS:

- A. **APPLICABLE LAW AND CHOICE OF FORUM:** This Contract shall be construed, governed, and interpreted pursuant to the laws of the Commonwealth of Virginia. All disputes arising under this Contract shall be brought before an appropriate court in the Commonwealth of Virginia.
- B. **ANTI-DISCRIMINATION:** By entering into this Contract Contractor certifies to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §§ 9&10 of the *Governing Rules*. If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the Contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*Governing Rules*, § 36).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this Contract, the Contractor agrees as follows:
 - a. The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - b. The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity employer.
 - c. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting these requirements.
 2. The Contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or Contractor.
- C. ANTITRUST: By entering into this Contract, the Contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under this Contract.
 - D. ASSIGNMENT: Neither party will assign or otherwise transfer its rights or obligations under this Contract without both parties' prior written consent. Any attempted assignment, transfer, or delegation without such consent is void.
 - E. AUDIT: The Contractor shall 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. The University, its authorized agents, and/or state auditors shall have full access to and the right to examine any of said materials during said period.
 - F. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the University shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this Contract.
 - G. AUTHORIZED SIGNATURES: The signatory for each Party certifies that he or she is an authorized agent to sign on behalf such Party.
 - H. BACKGROUND CHECKS: Contractor's employees (including subcontractors) performing services on any Mason campus must have successfully completed a criminal background check prior to the start of their work assignment/service. As stated in [Administrative Policy Number 2221 – Background Investigations](#), the criminal background investigation 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. Signature on this Contract confirms your compliance with this requirement.
 - I. CANCELLATION OF CONTRACT: Mason reserves the right to cancel this Contract, in part or in whole, without penalty, for any reason, upon 60 days written notice to the Contractor. Upon written notice of cancellation from Mason, Mason shall be fully released from any further obligation under the Contract and Contractor agrees to directly refund all payments, for services not already performed, to Mason, including any pre-paid deposits, within 14 days. 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.
 - J. CHANGES TO THE CONTRACT: Changes can be made to this Contract in any of the following ways:

1. The parties may agree in writing to modify the scope of this Contract.
 2. Mason may order changes within the general scope of Contract at any time by written notice to Contractor. Changes within the scope of this Contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. Contractor shall comply with the notice upon receipt. Contractor shall be compensated for any additional costs incurred as the result of such order and shall give Mason a credit for any savings. Said compensation shall be determined by one of the following methods:
 - a. By mutual agreement between the parties in writing; or
 - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the Contractor accounts for the number of units of work performed, subject to the Mason's right to audit Contractor's records and/or to determine the correct number of units independently; or
 - c. By ordering Contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by Contract. The same markup shall be used for determining a decrease in price as the result of savings realized. Contractor shall present Mason with all vouchers and records of expenses incurred and savings realized. Mason shall have the right to audit the records of Contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to Mason within thirty (30) days from the date of receipt of the written order from Mason. If the Parties fail to agree on an amount of adjustment, the question of an increase or decrease in the Contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this Contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and Their Contractors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this Contract shall excuse the Contractor from promptly complying with the changes ordered by Mason or with the performance of this Contract generally.
- K. CLAIMS: Contractual claims, whether for money or other relief, shall be submitted in writing no later than 60 days after final payment. However, written notice of the Contractor's intention to file a claim shall be given at the time of the occurrence or beginning of the work upon which the claim is based. Nothing herein shall preclude a contract from requiring submission of an invoice for final payment within a certain time after completion and acceptance of the work or acceptance of the goods. Pendency of claims shall not delay payment of amounts agreed due in the final payment.
1. The firm must submit written claim to:
Chief Procurement Officer
George Mason University
4400 University Drive, MSN 3C5
Fairfax, VA 22030
 2. The firm must submit any unresolved claim in writing no later than 60 days after final payment to the Chief Procurement Officer.
 3. Upon receiving the written claim, the Chief Procurement Officer will review the written materials relating to the claim and will mail his or her decision to the firm within 60 days after receipt of the claim.
 4. The firm may appeal the Chief Procurement Officer's decision in accordance with § 55 of the *Governing Rules*.
- L. COLLECTION AND ATTORNEY'S FEES: The Contractor shall pay to Mason any reasonable attorney's fees or collection fees, at the maximum allowable rate permitted under Virginia law, incurred in enforcing this Contract or pursuing and collecting past-due amounts under this Contract.
- M. COMPLIANCE: All goods and services provided to Mason shall be done so in accordance with any and all applicable local, state, federal, and international laws, regulations and/or requirements and any industry standards, including but not limited to: the Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability and

Accountability Act (HIPAA) and Health Information Technology for Economic and Clinical Health Act (HITECH), Government Data Collection and Dissemination Practices Act, Gramm-Leach-Bliley Financial Modernization Act (GLB), Payment Card Industry Data Security Standards (PCI-DSS), Americans with Disabilities Act (ADA), and Federal Export Administration Regulations. Any Contractor personnel visiting Mason facilities will comply with all applicable Mason policies regarding access to, use of, and conduct within such facilities. Mason's policies can be found at <https://universitypolicy.gmu.edu/all-policies/> and any facility specific policies can be obtained from the facility manager.

- N. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The Contractor shall ensure that personally identifiable information ("PII") which is defined as any information that by itself or when combined with other information can be connected to a specific person and may include but is not limited to personal identifiers such as name, address, phone, date of birth, Social Security number, student or personal identification numbers, driver's license numbers, state or federal identification numbers, biometric information, religious or political affiliation, non-directory information, and any other information protected by state or federal privacy laws, will be collected and held confidential and in accordance with this agreement, during and following the term of this Contract, and will not be divulged without the individual's and Mason's written consent and only in accordance with federal law or the Code of Virginia.
- O. CONFLICT OF INTEREST: Contractor represents to Mason that its entering into this Contract with Mason and its performance through its agents, officers and employees does not and will not involve, contribute to nor create a conflict of interest prohibited by Virginia State and Local Government Conflict of Interests Act (Va. Code 2.2-3100 *et seq*), the Virginia Ethics in Public Contracting Act (§57 of the *Governing Rules*), the Virginia Governmental Frauds Act (Va. Code 18.2 – 498.1 *et seq*) or any other applicable law or regulation.
- P. CONTINUITY OF SERVICES:
1. The Contractor recognizes that the services under this Contract are vital to Mason and must be continued without interruption and that, upon contract expiration, a successor, either Mason or another contractor, may continue them. The Contractor agrees:
 - a. To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
 - b. To make all Mason owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the contract to facilitate transition to successor; and
 - c. That the University Procurement Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.
 2. The Contractor shall, upon written notice from the Procurement Officer, furnish phase-in/phase-out services for up to ninety (90) days after this Contract expires and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the Procurement Officer's approval.
 3. The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in, phase-out operations). All phase-in/phase-out work fees must be approved by the Procurement Officer in writing prior to commencement of said work.
- Q. DEBARMENT STATUS: As of the Effective Date, the Contractor certifies that it is not currently debarred by the Commonwealth of Virginia from submitting bids or proposals on contracts for the type of services covered by this Contract, nor is the Contractor an agent of any person or entity that is currently so debarred.
- R. DEFAULT: In the case of failure to deliver goods or services in accordance with Contract terms and conditions, Mason, after due oral or written notice, may procure them from other sources and hold Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which Mason may have.
- S. DRUG-FREE WORKPLACE: Contractor has, and shall have in place during the performance of this Contract, a drug-free workplace policy (DFWP), which it provides in writing to all its employees, vendors, and subcontractors, and which specifically prohibits the following on company premises, during work-related activities, or while conducting company business: the sale, purchase, manufacture, dispensation, distribution possession, or use of any illegal drug under federal law (including marijuana). For purposes of this section, "drug-free workplace" covers all sites at which work is done by Contractor in connection with this Contract.

- T. ENTIRE CONTRACT: This Contract constitutes the entire understanding of the Parties with respect to the subject matter herein and supersedes all prior oral or written contracts with respect to the subject matter herein. This Contract can be modified or amended only by a writing signed by all of the Parties.
- U. EXCLUSIVITY/NON-COMPETE: During the term of this Contract, Contractor shall not, directly or indirectly, provide or teach any similar or identical training content, classes, programs, courses, lectures or seminars, developed by or for Mason, to a similar coach training program that competes with Mason's Center for the Advancement of Well-Being's coach training program, within 25 miles of the city of Fairfax, Virginia. A similar coach training program shall be defined as any coach training program accredited by the International Coach Federation (ICF).
- V. FORCE MAJEURE: Mason shall be excused from any and all liability for failure or delay in performance of any obligation under this Contract resulting from any cause not within the reasonable control of Mason, which includes but is not limited to acts of God, fire, flood, explosion, earthquake, or other natural forces, war, civil unrest, accident, any strike or labor disturbance, travel restrictions, acts of government, disease, pandemic, or contagion, whether such cause is similar or dissimilar to any of the foregoing. Upon written notification from Mason that such cause has occurred, Contractor agrees to directly refund all payments to Mason, for services not yet performed, including any pre-paid deposits within 14 days.
- W. FUTURE GOODS AND SERVICES: Mason reserves the right to have Contractor provide additional goods and/or services that may be required by Mason during the term of this Contract. Any such goods and/or services will be provided by the Contractor under the same pricing, terms and conditions of this Contract. Such additional goods and/or services may include other products, components, accessories, subsystems or related services that are newly introduced during the term of the contract. Such newly introduced additional goods and/or services will be provided to Mason at Favored Customer pricing, terms and conditions.
- X. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into this Contract Contractor certifies that they do not and will not during the performance of this Contract employ illegal alien workers or otherwise violate the provisions of the federal Immigration Reform and Control Act of 1986.
- Y. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless George Mason University, the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the Contractor/any services of any kind or nature furnished by the Contractor, provided that such liability is not attributable to the sole negligence of Mason or to the failure of Mason to use the materials, goods, or equipment in the manner already and permanently described by the Contractor on the materials, goods or equipment delivered.
- Z. INDEPENDENT CONTRACTOR: The Contractor is not an employee of Mason, but is engaged as an independent contractor. The Contractor shall indemnify and hold harmless the Commonwealth of Virginia, Mason, and its employees and agents, with respect to all withholding, Social Security, unemployment compensation and all other taxes or amounts of any kind relating to the Contractor's performance of this Contract. Nothing in this Contract shall be construed as authority for the Contractor to make commitments which will bind Mason or to otherwise act on behalf of Mason, except as Mason may expressly authorize in writing.
- AA. INFORMATION TECHNOLOGY ACCESS ACT: Computer and network security is of paramount concern at Mason. Mason wants to ensure that computer/network hardware and software does not compromise the security of its IT environment. Contractor agrees to use commercially reasonable measures in connection with any offering your company makes to avoid any known threat to the security of the IT environment at Mason.
- All e-learning and information technology developed, purchased, upgraded or renewed by or for the use of Mason shall comply with all applicable University policies, Federal and State laws and regulations including but not limited to Section 508 of the Rehabilitation Act (29 U.S.C. 794d), the Information Technology Access Act, §§2.2-3500 through 2.2-3504 of the Code of Virginia, as amended, and all other regulations promulgated under Title II of The Americans with Disabilities Act which are applicable to all benefits, services, programs, and activities provided by or on behalf of the University. The Contractor shall also comply with the Web Content Accessibility Guidelines (WCAG) 2.0. For more information, please visit <http://ati.gmu.edu>, under Policies and Procedures.
- BB. INSURANCE: The Contractor shall maintain all insurance necessary with respect to the services provided to Mason.

The Contractor further certifies that they will maintain the insurance coverage during the entire term of the Contract and that all insurance is to be placed with insurers with a current reasonable A.M. Best's rating authorized to sell insurance in the Commonwealth of Virginia by the Virginia State Corporation Commission. The Commonwealth of Virginia and Mason shall be named as an additional insured. By requiring such minimum insurance, Mason shall not be deemed or construed to have assessed the risk that may be applicable to the Contractor. The Contractor shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverage. The Contractor is not relieved of any liability or other obligations assumed or pursuant to this Contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types.

1. Commercial General Liability Insurance in an amount not less than \$1,000,000 per occurrence for bodily injury or property damage, personal injury and advertising injury, products and completed operations coverage;
2. Workers Compensation Insurance in an amount not less than that prescribed by statutory limits; and, as applicable;
3. Commercial Automobile Liability Insurance applicable to bodily injury and property damage, covering owned, non-owned, leased, and hired vehicles in an amount not less than \$1,000,000 per occurrence; and
4. An umbrella/excess policy in an amount not less than five million dollars (\$5,000,000) to apply over and above Commercial General Liability, Employer's Liability, and Commercial Automobile Liability Insurance.

CC. INTELLECTUAL PROPERTY: Contractor warrants and represents that it will not violate or infringe any intellectual property right or any other personal or proprietary right and shall indemnify and hold harmless Mason against any claim of infringement of intellectual property rights which may arise under this Contract.

1. Unless expressly agreed to the contrary in writing, all goods, products, materials, documents, reports, writings, video images, photographs or papers of any nature including software or computer images prepared or provided by Contractor (or its subcontractors) for Mason will not be disclosed to any other person or entity without the written permission of Mason.
2. Work Made for Hire. Contractor warrants to Mason that Mason will own all rights, title and interest in any and all intellectual property rights created in the performance or otherwise arising from the Contract and will have full ownership and beneficial use thereof, free and clear of claims of any nature by any third party including, without limitation, copyright or patent infringement claims. Contractor agrees to assign and hereby assigns all rights, title, and interest in any and all intellectual property created in the performance or otherwise arising from the Contract, and will execute any future assignments or other documents needed for Mason to document, register, or otherwise perfect such rights. Notwithstanding the foregoing, for research collaboration pursuant to subcontracts under sponsored research Contracts administered by the University's Office of Sponsored Programs, intellectual property rights will be governed by the terms of the grant or contract to Mason to the extent such grant or contract requires intellectual property terms to apply to subcontractors.

DD. NON-DISCRIMINATION: All parties to this Contract agree to not discriminate on the basis of race, color, religion, national origin, sex, pregnancy, childbirth or related medical conditions, age (except where sex or age is a bona fide occupational qualification, marital status or disability).

EE. PAYMENT TO SUBCONTRACTORS: The Contractor shall take the following actions upon receiving payment from Mason: (1) pay the subcontractor within seven days for the proportionate share of the total payment received from Mason attributable to the work performed by the subcontractor under that Contract; or (2) notify Mason and subcontractor within seven days, in writing, of its intention to withhold all or a part of the subcontractor's payment with the reason for nonpayment. b. If an individual contractor, provide social security number in order to receive payment. c. If a proprietorship, partnership or corporation provide Federal employer identification number. d. Pay interest to subcontractors on all amounts owed by the Contractor that remain unpaid after seven days following receipt by the Contractor of payment from the Institution for work performed by the subcontractor under that Contract, except for amounts withheld as allowed by prior notification. e. Accrue interest at no more than the rate of one percent per month. f. Include in each of its subcontracts a provision requiring each subcontractor to include or otherwise be subject to the same payment and interest requirements with respect to each lower-tier subcontractor.

- FF. PUBLICITY: The Contractor shall not use, in its external advertising, marketing programs or promotional efforts, any data, pictures, trademarks or other representation of Mason except on the specific written authorization in advance by Mason's designated representative.
- GG. REMEDIES: If the Contractor breaches this Contract, in addition to any other rights or remedies, Mason may terminate this Contract without prior notice.
- HH. RENEWAL OF CONTRACT: This Contract may be renewed for four (4) successive one-year renewal options under the terms and conditions of this Contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the University's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
1. If the University elects to exercise the option to renew the Contract for an additional one-year period, the Contract price(s) for the additional one year shall not exceed the Contract price(s) of the original Contract increased/decreased by more than the percentage increase/decrease of the "other goods and services" category of the CPI-U section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available or 2%, whichever is lower.
 2. If during any subsequent renewal periods, the University elects to exercise the option to renew the Contract, the Contract price(s) for the subsequent renewal period shall not exceed the Contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the "other goods and services" category of the CPI-U section of the Consumer Price Index of the United States bureau of Labor Statistics for the latest twelve months for which statistics are available, or 2%, whichever is lower.
- II. REPORTING OF CRIMES, ACCIDENTS, FIRES AND OTHER EMERGENCIES: Any Mason Employee, including contracted service providers, who is not a staff member in Counseling and Psychological Services (CAPS) or a pastoral counselor, functioning within the scope of that recognition, is considered a "Campus Security Authority (CSA)." CSAs must promptly report all crimes and other emergencies occurring on or near property owned or controlled by Mason to the Department of Police & Public Safety or local police and fire authorities by dialing 9-1-1. At the request of a victim or survivor, identifying information may be excluded from a report (e.g., names, initials, contact information, etc.). Please visit the following website for more information and training: <http://police.gmu.edu/clery-act-reporting/campus-security-authority-csa/>."
- JJ. RESPONSE TO LEGAL ORDERS, DEMANDS, OR REQUESTS FOR DATA: Except as otherwise expressly prohibited by law, Contractor will: i) immediately notify Mason of any subpoenas, warrants, or other legal orders, demands or requests received by Contractor seeking University Data; ii) consult with Mason regarding its response; iii) cooperate with Mason's reasonable requests in connection with efforts by Mason to intervene and quash or modify the legal order, demand or request; and iv) upon Mason's request, provide Mason with a copy of its response.
- If Mason receives a subpoena, warrant, or other legal order, demand (including request pursuant to the Virginia Freedom of Information Act) or request seeking University Data maintained by Contractor, Mason will promptly provide a copy to Contractor. Contractor will promptly supply Mason with copies of data required for Mason to respond, and will cooperate with Mason's reasonable requests in connection with its response.
- KK. SEVERABILITY: Should any portion of this Contract be declared invalid or unenforceable for any reason, such portion is deemed severable from the Contract and the remainder of this Contract shall remain fully valid and enforceable.
- LL. SOVEREIGN IMMUNITY: Nothing in this Contract shall be deemed a waiver of the sovereign immunity of the Commonwealth of Virginia and of Mason.
- MM. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent from Mason. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish Mason the names, qualifications and experience of their proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of this Contract. This paragraph applies to, but is not limited to, subcontractor(s) who process University Data.

- NN. SWaM CERTIFICATION: Contractor agrees to fully support the Commonwealth of Virginia and Mason's efforts related to SWaM goals. Upon contract execution, Contractor, if eligible, shall submit all required documents necessary to achieve SWaM certification to the Department of Small Business and Supplier Diversity within 90 days. If Contractor is currently SWaM certified, Contractor agrees to maintain their certification for the duration of this Contract and shall submit all required renewal documentation at least 30 days prior to existing SWaM expiration at <https://www.sbsd.virginia.gov/>.
- OO. UNIVERSITY DATA: University Data includes all Mason owned, controlled, or collected PII and any other information that is not intentionally made available by Mason on public websites, including but not limited to business, administrative and financial data, intellectual property, and patient, student and personnel data. Contractor agrees to the following regarding University Data it may collect or process as part of this contract:
1. Contractor will use University Data only for the purpose of fulfilling its duties under the Contract and will not share such data with or disclose it to any third party without the prior written consent of Mason, except as required by the Contract or as otherwise required by law. University Data will only be processed by Contractor to the extent necessary to fulfill its responsibilities under the Contract or as otherwise directed by Mason.
 2. University Data, including any back-ups, will not be accessed, stored, or transferred outside the United States without prior written consent from Mason. Contractor will provide access to University Data only to its employees and subcontractors who need to access the data to fulfill Contractor's obligations under the Contract. Contractor will ensure that employees who perform work under the Contract have read, understood, and received appropriate instruction as to how to comply with the data protection provisions of the Contract and to maintain the confidentiality of the University Data.
 3. The parties agree that as between them, all rights including all intellectual property rights in and to University Data shall remain the exclusive property of Mason, and Contractor has a limited, nonexclusive license to use the University Data as provided in the Contract solely for the purpose of performing its obligations under the Contract. The Contract does not give a party any rights, implied or otherwise, to the other party's data, content, or intellectual property, except as expressly stated in the Contract.
 4. Contractor will take reasonable measures, including audit trails, to protect University Data against deterioration or degradation of data quality and authenticity. Contractor shall be responsible for ensuring that University Data, per the Virginia Public Records Act, is preserved, maintained, and accessible throughout their lifecycle, including converting and migrating electronic data as often as necessary so that information is not lost due to hardware, software, or media obsolescence or deterioration.
 5. Contractor shall notify Mason within three business days if it receives a request from an individual under any applicable law regarding PII about the individual, including but not limited to a request to view, access, delete, correct, or amend the information. Contractor shall not take any action regarding such a request except as directed by Mason.
 6. If Contractor will have access to University Data that includes "education records" as defined under the Family Educational Rights and Privacy Act (FERPA), the Contractor acknowledges that for the purposes of the Contract it will be designated as a "school official" with "legitimate educational interests" in the University education records, as those terms have been defined under FERPA and its implementing regulations, and the Contractor agrees to abide by the limitations and requirements imposed on school officials. Contractor will use the education records only for the purpose of fulfilling its duties under the Contract for Mason's and its end user's benefit, and will not share such data with or disclose it to any third party except as provided for in the Contract, required by law, or authorized in writing by the University.
 7. Mason may require that Mason and Contractor complete a Data Processing Addendum ("DPA"). If a DPA is completed, Contractor agrees that the information in the DPA is accurate. Contractor will only collect or process University Data that is identified in the DPA and will only handle that data (e.g., type of processing activities, storage, security, disclosure) as described in the DPA. If Contractor intends to do anything regarding University Data that is not reflected in the DPA, Contractor must request an amendment to the DPA and may not take the intended action until the amendment is approved and documented by Mason.
- PP. UNIVERSITY DATA SECURITY: Data security is of paramount concern to Mason. Contractor will utilize, store and

process University Data in a secure environment in accordance with commercial best practices, including appropriate administrative, physical, and technical safeguards, to secure such data from unauthorized access, disclosure, alteration, and use. Such measures will be no less protective than those used to secure Contractor's own data of a similar type, and in no event less than reasonable in view of the type and nature of the data involved. At a minimum, Contractor shall use industry-standard and up-to-date security tools and technologies such as anti-virus protections and intrusion detection methods to protect University Data.

1. Immediately upon becoming aware of circumstances that could have resulted in unauthorized access to or disclosure or use of University Data, Contractor will notify Mason, fully investigate the incident, and cooperate fully with Mason's investigation of and response to and remediation of the incident. Except as otherwise required by law, Contractor will not provide notice of the incident directly to individuals who's PII was involved, regulatory agencies, or other entities, without prior written permission from Mason.
2. Mason reserves the right in its sole discretion to perform audits of Contractor, at Mason's expense, to ensure compliance with all obligations regarding University Data. Contractor shall reasonably cooperate in the performance of such audits. Contractor will make available to Mason all information necessary to demonstrate compliance with its data processing obligations. Failure to adequately protect University Data or comply with the terms of this Contract with regard to University Data may be grounds to terminate this Contract.

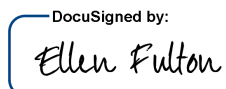
QQ. UNIVERSITY DATA UPON TERMINATION OR EXPIRATION: Upon termination or expiration of the Contract, Contractor will ensure that all University Data are securely returned or destroyed as directed by Mason in its sole discretion within 180 days of the request being made. Transfer to Mason or a third party designated by Mason shall occur within a reasonable period of time, and without significant interruption in service. Contractor shall ensure that such transfer/migration uses facilities and methods that are compatible with the relevant systems of Mason or its transferee, and to the extent technologically feasible, that Mason will have reasonable access to University Data during the transition. In the event that Mason requests destruction of its data, Contractor agrees to destroy all data in its possession and in the possession of any subcontractors or agents to which the Contractor might have transferred University Data. Contractor agrees to provide documentation of data destruction to the University.

Contractor will notify the University of any impending cessation of its business and any contingency plans. This includes immediate transfer of any previously escrowed assets and University Data and providing Mason access to Contractor's facilities to remove and destroy Mason-owned assets and University Data. Contractor shall implement its exit plan and take all necessary actions to ensure a smooth transition of service with minimal disruption to Mason. Contractor will also provide a full inventory and configuration of servers, routers, other hardware, and software involved in service delivery along with supporting documentation, indicating which if any of these are owned by or dedicated to Mason. Contractor will work closely with its successor to ensure a successful transition to the new equipment, with minimal downtime and effect on Mason, all such work to be coordinated and performed in advance of the formal, final transition date.

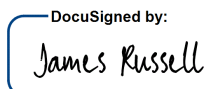
RR. UNIVERSITY REVIEW/APPROVAL: All goods, services, products, design, etc. produced by the Contractor for or on behalf of Mason are subject to Mason's review and approval.

SS. WAIVER: The failure of a party to enforce any provision in this Contract shall not be deemed to be a waiver of such right.

Washington Coaching Group LLC

DocuSigned by:

 Signature
 Ellen Fulton
 Name: _____
 Title: Managing Prinicipal
 Date: 9/20/2023

George Mason University

DocuSigned by:

 Signature
 James Russell
 Name: _____
 Title: Purchasing Director
 Date: 9/20/2023



Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, VA 22030
Phone: 703.993.2580 | Fax: 703.993.2589
<http://fiscal.gmu.edu/purchasing/>

September 14, 2023

RFP GMU-1836-23 Leadership Coaching & Development Services Negotiations Summary with Washington Coaching Group

Coaching Vendor Administration for Executive Education Programs

MASON proposed Administration Fee structure:

- 150-199 participants = \$2500
- 100-149 participants = \$2000
- 50-99 participants = \$1500
- 5-49 participant = \$1000
- 1-hour overview of coaching to participants/introduction of coaches: **\$325**

MASON proposed hourly Coaching Session Fee structure:

- **\$325/hr ACC/PCC-level coaches**
- **\$425/hr MCC-level coaches**

MASON would like to clarify that the Coaching Vendor Administration services will include introducing coaches to clients (i.e. bios, videos, coaching overview PPT, etc.), tracking session completion and sending reminders to clients about coaching sessions in addition to vetting, selecting, scheduling (and rescheduling if needed) all program coaching sessions with ICF Coaches.

Washington Coaching Group (“WCG”) counter-proposes the Administration Fee structure:

- 150-199 sessions = \$3000
- 100-149 sessions = \$2500
- 50-99 sessions = \$2000
- 5-49 sessions = \$1000
- 1-hour overview of coaching to participants/introduction of coaches: **\$337.50**

WCG counter-proposes hourly Coaching Session Fee structure:

- **\$337.50/hr* ACC/PCC/MCC-level coaches in non-specific coaching requirement Executive Education Programs**

- **\$437.50/hr MCC-level coaches in specified MCC only coaching requirement Executive Education Programs**

Mason Accepted counter-proposal

Director of Coaching Education

MASON proposed Fee Structure for Director of Coaching Education:

- MASON proposes **\$23,000** for the MCC for the Leadership, Coaching for Organizational Well-Being program per virtual and in-person cohort. Travel costs will be reimbursed for in-person deliveries.

WCG accepted

- MASON accepts the proposed rates of **\$20,000** for the MCC for the Masterful Coaching Course and **\$12,000** for the Co-Instructor provided by Washington Coaching Group.

WCG accepted

- Mason sets the target enrollment for each Masterful Coaching course to be between **10-14 participants**. Mason reserves the right to determine course availability and feasibility for enrollments less than 10 participants or more than 14. Final course availability and feasibility will be determined 2 weeks (or 10 business days, whichever is closer to the start-date) before the expected course start date. Mason reserves the right to make the sole decision regarding course running, availability, and feasibility.

WCG counter-proposes that Mason sets the target enrollment for each Masterful Coaching Course to be a maximum of **12 participants with two faculty members or a maximum of 15 participants with three Faculty members**. Mason reserves the right to determine course availability and feasibility for enrollments less than 10 participants. Final course availability and feasibility will be determined 2 weeks (or 10 business days, whichever is closer to the start-date) before the expected course start date. Mason reserves the right to make the sole decision regarding course running, availability, and feasibility.

Mason agrees to offer the MCC program with 10-12 participants with 2 MCC faculty.

- MASON will pay the Washington Coaching Group **\$1275 per participant** registered beyond the target maximum of 14 participants. This is based on MASON's proposed hourly MCC coaching rate to accommodate the three 1-on-1 mentoring coaching sessions.

WCG counter-proposes that if registration exceeds the maximum of 12 participants, that another MCC mentor coach must be hired to do group mentor coaching, observations, and feedback. This would require the additional faculty member to attend and facilitate a group for all 5 practice labs, meet 1:1 for three 1-hour sessions, and complete a formal written evaluation on coaching recordings from each of their lab participants. If the practice lab has 5 people, the total estimated time requirement would be 45 hours. This is an approximate hourly rate of \$155.55 which is well below the MCC typical coaching rate. WCG proposes \$7,000 for such additional faculty member provided by WCG. If hiring an additional faculty member is not feasible, WCG proposes to limit the enrollment to the maximum of 12 participants.

Mason counter-proposed:

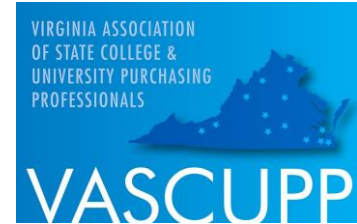
If there are 13, 14, or 15 participants, Mason will offer WCG \$2,000 per participant.

Mason reserves the right to determine course availability and feasibility for enrollments less than 10 participants. Final course availability and feasibility will be determined 2 weeks (or 10 business days, whichever is closer to the start-date) before the expected course start date. Mason reserves the right to make the sole decision regarding course running, availability, and feasibility.

WCG accepted



Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, VA 22030
Voice: 703.993.2580 | Fax: 703.993.2589
<http://fiscal.gmu.edu/purchasing/>



**REQUEST FOR PROPOSALS
GMU-1836-23**

ISSUE DATE: June 9, 2023

TITLE: Leadership Coaching & Development Services

PRIMARY PROCUREMENT OFFICER: Sara Siddall, Strategic Sourcing Manager

SECONDARY PROCUREMENT OFFICER: James F. Russell, Director

QUESTIONS/INQUIRIES: Submit all inquiries through [Mason's Bonfire Portal](#), no later than 4:00 PM Eastern Time (ET) on June 26, 2023. **All questions must be submitted through Mason's Bonfire portal.** For assistance with technical questions related to Bonfire, contact Support@GoBonfire.com or visit Bonfire's help forum at <https://vendorsupport.gobonfire.com/hc/en-us>. Responses to questions will be posted to Mason's Bonfire portal by 5:00 PM ET on July 10, 2023.

PROPOSAL DUE DATE AND TIME: July 6, 2023 @ 2:00 PM ET. ATTENTION: PROPOSALS WILL NOT BE ACCEPTED VIA EMAIL, MAIL, OR IN PERSON. SEE SECTION XIII.A.1 FOR DETAILS ON ELECTRONIC PROPOSAL SUBMISSION.

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/Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiations.

Name and Address of Firm:

Legal Name: _____

Date: _____

DBA: _____

Address: _____

By: _____
Signature

FEI/FIN No. _____

Name: _____

Fax No. _____

Title: _____

Email: _____

Telephone No. _____

SWaM Certified: Yes: _____ No: _____ (See Section VII. SWaM CERTIFICATION for complete details).

SWaM Certification Number: _____

This public body does not discriminate against faith-based organizations in accordance with the *Governing Rules*, § 36 or against a Bidder/Offeror because of race, religion, color, sex, national origin, age, disability, or any other prohibited by state law relating to discrimination in employment.

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I. PURPOSE:

The purpose of this Request for Proposals (RFP) is to solicit proposals from experienced and certified coaching service administrators with experience working with diverse populations to establish a contract through competitive negotiations with one or more qualified contractors to provide services designed to enhance the brand, image, enrollments, and revenues of the continuing and professional education programs at George Mason University ("Mason", "University"). George Mason University is an educational institution and agency of the Commonwealth of Virginia.

Mason reserves the right to make one award or multiple awards. An Offeror may choose to submit a proposal on all services requested or only the requirements that best suit that particular Offeror's expertise. An award does not guarantee assigned work.

II. PURCHASING MANUAL/GOVERNING RULES:

This solicitation and any resulting contract shall be subject to the provisions of the Commonwealth of Virginia *Purchasing Manual for Institutions of Higher Education and their Vendor's*, and any revisions thereto, and the *Governing Rules*, which are hereby incorporated into this contract in their entirety. A copy of both documents is available for review at: <https://vascupp.org>

III. COMMUNICATION:

Communications regarding the Request For Proposals shall be formal from the date of issuance until a contract has been awarded. Unless otherwise instructed offerors are to communicate with only the Procurement Officers listed on the cover page. Offerors are not to communicate with any other employees of Mason.

IV. FINAL CONTRACT:

ATTACHMENT B to this solicitation is Mason's standard two-party contract. It is the intent of this solicitation to base the final contractual documents off of Mason's standard two-party contract and Mason's General Terms and Conditions. Any exceptions to our standard contract and General Terms and Conditions should be denoted in your RFP response. Other documents may be incorporated into the final contract, either by way of attachment or by reference, but in all cases this contract document and Mason's General Terms and Conditions shall jointly take precedence over all other documents and will govern the terms and conditions of the contract.

As a public institution of higher education in Virginia Mason cannot agree to any of the following terms in any documents:

- A. An express or implied waiver of sovereign immunity.
- B. An agreement to indemnify, defend or hold harmless any entity.
- C. An agreement to maintain insurance.
- D. An agreement providing for binding arbitration.
- E. An agreement providing for the payment of attorneys' fees, costs of collection, or liquidated damages.
- F. Waiver of jury trial.
- G. Choice of law or venue other than the Commonwealth of Virginia.

Contracts will only be issued to the FEI/FIN Number and Firm listed on the signed cover page submitted in your RFP response. Joint proposals will not be accepted.

V. ADDITIONAL USERS:

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

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of the contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the contractor.

The University may require the Contractor provide semi-annual usage reports for all entities accessing the contract. The University 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 the University 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 the resulting contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

VI. eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION:

The eVA Internet electronic procurement solution, website portal www.eVA.virginia.gov, streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eProcurement solution by completing the free eVA Vendor Registration. All bidders or offerors agree to self-register in eVA and pay the Vendor Transaction Fees prior to being awarded a contract. Registration instructions and transaction fees may be viewed at: <https://eva.virginia.gov/>

VII. SWaM CERTIFICATION:

Vendor agrees to fully support the Commonwealth of Virginia and Mason's efforts related to SWaM goals. Upon contract execution, eligible vendors (as determined by Mason and the Virginia Department of Small Business and Supplier Diversity) shall submit all required documents necessary to achieve SWaM certification to the Department of Small Business and Supplier Diversity within 90 days. Vendors currently SWaM certified agree to maintain their certification for the duration of the contract and shall submit all required renewal documentation at least 30 days prior to existing SWaM expiration. <https://www.sbsd.virginia.gov/>

VIII. SMALL BUSINESS SUBCONTRACTING PLAN:

All potential offerors are required to fill out and submit Attachments A with their proposal.

Note: Invoices shall only be submitted to Mason by the entity awarded a contract. Subcontractors cannot submit invoices to Mason under any resulting contract.

IX. PERIOD OF PERFORMANCE:

One (1) year from Effective Date of contract with four (4) successive one-year renewal options (or as negotiated).

X. BACKGROUND:

George Mason University's Center for the Advancement of Well-Being (CWB) offers a number of continuing and professional education programs. These programs offer a distinctive approach to leadership development that achieves powerful results. CWB strives to create an inclusive and diverse academic community and strongly believes that diversity enriches the educational environment by bringing varied interests, perspectives and experiences to the learning, teaching, research and creative activities that make up our core mission.

CWB's continuing and professional education programs combine the knowledge and expertise of George Mason University faculty with the experience of global business leaders, thought leaders, and practitioners. Faculty represent a wide range of fields and disciplines including business management, industrial organizational psychology, leadership studies, communications, cyber security, and policy and government to name a few. Target audiences for these programs include professionals at emerging, mid-level, and senior leadership levels in government and various private sector industries. Thousands of leaders have completed CWB's certificate programs. Many of CWB's leadership development programs include one-on-one coaching sessions for participants. Find information about CWB's open enrollment and closed contract programs at <https://wellbeing.gmu.edu/certificate-programs/>.

CWB offers two open enrollment coaching education programs: Leadership Coaching for Organizational Well-Being and the Masterful Coaching Course. The curricula for both courses are established, but complementary modules may be added as new research and coaching approaches are developed. Both courses are rigorous and built upon the best practices of coaching as well as academic research on strengths-based leadership, resilience, and well-being. All interested participants must apply and be admitted by a faculty selection panel before registering. In addition to these two programs described below, CWB offers an open enrollment Business of Coaching program.

Leadership Coaching for Organizational Well-Being is a coach training program that is accredited as an ACTP (soon to be Level 2) by the International Coach Federation (ICF). This experiential program features a competency and research-based curriculum that aligns with the ICF requirements and coaching competencies. It is offered as an open enrollment program twice annually, once in the fall semester and again in the spring semester. Admitted participants commit to six months of

coursework, observed coaching experiences, mentorship, and evaluation. Instructors, learning lab advisors, and assessors must have relevant expertise and skill.

The Masterful Coaching Course is an MCC Coaching Education program that meets the criteria for Level 3 Coaching Education accreditation by the ICF. This is an advanced coaching course for PCC-credentialed coaches who wish to develop the art and skill of a masterful coach. The five-month program includes in-depth instruction and exploration on various advanced coaching topics, including: partnership and performance, coaching presence, vulnerability, assumptions, bias, confidence, and more. Participants will observe MCC coaches in action, and they will use these coaching demonstrations to identify masterful coaching distinctions.

George Mason University Continuing and Professional Education (CPE) assists CWB in the contracting and delivery of their continuing and professional education programs. Mason CPE offers a diverse portfolio of courses and training programs designed for professionals across a range of industries and experience levels. CPE possesses 30 years of experience providing workforce and professional development training. CPE is the single point of contact for organizations and individuals seeking to leverage the comprehensive for-credit and non-credit curricula of Virginia's largest research university in Virginia.

XI. STATEMENT OF NEEDS:

CWB requires a reputable coaching vendor to provide services in the following roles:

- Director of Coaching Education
- Coaching Vendor Administration for Executive Education Programs

All vendors must provide an MCC-level coach that also serves as a Director of Training for other coaches. The vendor must provide coaching services (i.e., select certified coaches, schedule coaching sessions, and conduct quality control of coaching credentials, etc.). Coaches provided by vendor must have a bachelor's degree; a master's degree is preferred. Coaches should have experience working with diverse populations. Individuals holding certifications in various organizational, leadership development, assessments, approaches, and coaching credentials highly preferred. Coaching Instructors must have experience teaching, coaching, and facilitating online and should list the names of preferred virtual platforms and programs in their proposal. Previous experience providing coaching education and coaching vendor administration at Mason is preferred.

1. **Director of Coaching Education:** The Director of Coaching Education leads designated coaching education programs and ensures that the programs meet ICF accreditation requirements. Contractor must be an ICF MCC accredited coach, with considerable experience in coaching education, mentor coaching, and in-depth understanding of the ICF competencies and behavioral markers. Completion of ICF PCC Markers Training is required. Coaching supervision training is preferred. Contractors must have a track record of successfully preparing PCC coaches to earn the ICF Master Certified Credential.

Proposal Requirements: To demonstrate technical expertise, please explain your overall philosophy on your coaching and on coaching education. Indicate your number of years of experience as a coach, and explain your previous experience with coaching education, mentor coaching and preparing PCC coaches to earn the ICF Master Certified Credential. If you use specific models for learning and development, please indicate those, and explain your reasoning.

2. Coaching Vendor Administration for Executive Education Programs

CWB executive education programs offer optional one-on-one coaching for up to 500 participants annually. Coaching vendors must have demonstrated capacity to provide coaches for large scale contracts, typically offering 1-3 coaching sessions/participant. Accurate, detailed, and timely monthly reporting of coaching progress required. Offerors should have the following appropriate expertise: MCC accreditation; the ability to support multiple simultaneous coaching programs. Offerors must contract with coaches who are accredited by the ICF and have ACC, PCC, or MCC certifications.

Proposal Requirements: Please describe your coach selection and assignment process and your experience and approach to coaching vendor administration for leadership development programs. Submit names, accreditations, educational degrees of coaches, number of hours of coaching experience, and an example of your monthly coaching report.

XII. COST OF SERVICES:

See section XIII.B.5 Proposed Pricing.

XIII. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:

A. GENERAL REQUIREMENTS:

1. **RFP Response:** In order to be considered, Offerors must submit a complete response to Mason's Purchasing Office prior to the due date and time stated in this RFP. Offerors are required to submit one (1) signed copy of the entire proposal including all attachments and proprietary information. If the proposal contains proprietary information, then two (2) proposals must be submitted; one (1) with proprietary information included and one (1) with proprietary information removed (see also Item 2d below for further details). The Offeror shall make no other distribution of the proposals.

At the conclusion of the RFP process proposals with proprietary information removed (redacted versions) shall be provided to requestors in accordance with Virginia's Freedom of Information Act. Offerors will not be notified of the release of this information.

ELECTRONIC PROPOSAL SUBMISSION: ATTENTION: PROPOSALS WILL NOT BE ACCEPTED VIA EMAIL, MAIL, OR IN PERSON. Mason will only be accepting electronic proposal submissions via Bonfire for this Request For Proposals.

The following shall apply:

- a. You must register with Bonfire and submit your proposal, and it must be received prior to the submission deadline, by submitting through the online Bonfire portal at <https://gmu.bonfirehub.com>.
 - b. The Offeror must ensure the proposals are uploaded and submitted through Bonfire sufficiently in advance of the proposal deadline. **Plan Ahead: It is the Offeror's responsibility to ensure that electronic proposal submissions have sufficient time to make its way through Bonfire's submission portal. Mason recommends you submit your proposal the day prior to the due date.**
 - c. Submissions by other methods will not be accepted. Minimum system requirements: Microsoft Edge, Google Chrome, Safari, or Mozilla Firefox. JavaScript and browser cookies must be enabled.
 - d. Respondents should contact Bonfire at support@gobonfire.com for technical questions related to submission or visit Bonfire's help forum at <https://vendorsupport.gobonfire.com/hc/en-us>
 - e. Submission materials should be prepared in the file formats listed under Requested Information for this opportunity in the Bonfire Portal. The maximum upload file size is 1000 MB. Documents should not be embedded within uploaded files, as the embedded files will not be accessible or evaluated.
 - f. All solicitation schedules are subject to change.
 - g. Go to Bonfire and Mason's Purchasing website for all updates and schedule changes. <https://fiscal.gmu.edu/purchasing/do-business-with-mason/view-current-solicitation-opportunities/>
2. **Proposal Presentation:**
 - a. Proposals shall be signed by an authorized representative of the Offeror. All information requested must be submitted. Failure to submit all information requested may result in your proposal being scored low.
 - b. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirement 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 corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter and repeat the text of the requirement as it appears in the RFP. 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 requirement of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material.

A MS Word version of this RFP will be provided upon request.

- d. Except as provided, once an award is announced, all proposals submitted in response to this RFP will be open to inspection by any citizen, or interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by a firm prior to or as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act only under the following circumstances: (1) the appropriate information is clearly identified by some distinct method such as highlighting or underlining; (2) only the specific words, figures, or paragraphs that constitute trade secrets or proprietary information are identified; and (3) a summary page is supplied immediately following the proposal title page that includes (a) the information to be protected, (b) the section(s)/page number(s) where this information is found in the proposal, and (c) a statement why protection is necessary for each section listed. The firm must also provide a separate attachment of the proposal with the trade secrets and/or proprietary information redacted. *If all of these requirements are not met, then the firm's entire proposal will be available for public inspection.*

IMPORTANT: A firm may not request that its entire proposal be treated as a trade secret or proprietary information, nor may a firm request that its pricing/fees be treated as a trade secret or proprietary information, or otherwise be deemed confidential. If after given a reasonable time, the Offeror refuses to withdraw the aforementioned designation, the proposal will be rejected.

3. Oral Presentation: Offerors who submit a proposal in response to this RFP **may be** required to give an oral presentation/demonstration of their proposal/product to Mason. This will provide an opportunity for the Offeror to clarify or elaborate on their proposal. Performance during oral presentations may affect the final award decision. If required, oral presentations will be scheduled at the appropriate time.

Mason will expect that the person or persons who will be working on the project to make the presentation so experience of the Offeror's staff can be evaluated prior to making selection. Oral presentations are an option of Mason and may or may not be conducted; therefore, it is imperative all proposals should be complete.

B. SPECIFIC REQUIREMENTS:

Proposals should be as thorough and detailed as possible to allow Mason to properly evaluate the Offeror's capabilities and approach toward providing the required services. Offerors should submit the following items as a complete proposal.

1. Procedural information:
 - a. Return signed cover page and all addenda, if any, signed and completed as required.
 - b. Return Attachment A - Small Business Subcontracting Plan.
 - c. Return Attachment C - RFP Role Selection
 - d. State your payment preference. (See section XVI.)
2. Executive Summary: Offerors must submit an executive summary at the beginning of the proposal response not to exceed 2 pages.
3. Qualifications and Experience: Describe your experience, qualifications and success in providing the services described in the Statement of Needs to include the following:
 - a. Background and brief history of your company.
 - b. Names, qualifications and experience of personnel to be assigned to work with Mason.
 - c. No fewer than three (3) references that demonstrate the Offeror's qualifications, preferably from other comparable higher education institutions and client organizations your company is/has provided services with and that are similar in size and scope to that which has been described herein. Include a contact name, contact title, phone number, and email for each reference and indicate the length of service.
 - d. For each service proposed from section XI, Statement of Needs, include a brief paragraph summarizing your experience and expertise. Also include:
 - i. Up to a 2-page, project-based resume with education, certifications, and 2-4 sentences on each project that relates to the service proposed. Include durations with months and years the project occurred.
 - ii. If responding to the Coaching Vendor Support requirement (XI, A) include up to three past performance descriptions, no longer than a page each. Include a full project description, including successes and challenges, with dates, and a client reference with

phone and email contact information.

4. Specific Plan (Methodology): Explain your specific plans for providing the proposed services outlined in the Statement of Needs including:
 - a. Your approach to providing the services described herein.
 - b. What, when and how services will be performed.
5. Proposed Pricing: Provide pricing for each service proposed as outlined below
 - a. Coaching Education Program Support:
 - i. Director of Coaching Education
 - Fixed program rate to include:
 - Attend each module
 - Conduct instructor debriefs after each module
 - Monitor and support mentor coaches
 - Support and mentor students
 - Review and evaluate final recordings, flagged by mentor coaches
 - Mentor coaching students who do not pass their first recording
 - Total Level of Effort = 25 days
 - ii. Coaching Vendor Administration for Executive Education Programs
 - Hourly rate
6. In your proposal response please address the following:
 - a. Are you and/or your subcontractor currently involved in litigation with any party?
 - b. Please list any investigation or action from any state, local, federal or other regulatory body (OSHA, IRS, DOL, etc.) related to your firm or any subcontractor in the last three years.
 - c. Please list all lawsuits that involved your firm or any subcontractor in the last three years.
 - d. In the past ten (10) years has your firm's name changed? If so please provide a reason for the change.

XIV. INITIAL EVALUATION CRITERIA AND SUBSEQUENT AWARD:

A. INITIAL EVALUATION CRITERIA:

Proposals shall be initially evaluated and ranked using the following criteria:

<u>Description of Criteria</u>	<u>Maximum Point Value</u>
1. Quality of products/services offered and suitability for the intended purpose	20
2. Qualifications and experiences of offeror in providing the goods/services, including references	30
3. Specific plans or methodology to be used to provide the services	20
4. Price Offered	20
5. Offeror is certified as a small, minority, or women-owned business (SWaM) with Virginia SBSD at the proposal due date & time.	10
Total Points Available:	100

B. AWARD:

Following the initial scoring by the evaluation committee, at least two or more top ranked offerors may be contacted for oral presentations/demonstrations or advanced directly to the negotiations stage. ***If oral presentations are conducted Mason will then determine, in its sole discretion, which offerors will advance to the negotiations phase.*** Negotiations shall then be conducted with each of 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, Mason shall select the offeror which, in its sole discretion has made the best proposal, and shall award the contract to that offeror. When the terms and conditions of multiple awards are so provided in the Request for Proposal, awards may be made to more than one offeror. Should Mason 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. Mason is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (*Governing Rules §49.D.*).

XV. **CONTRACT ADMINISTRATION:**

Upon award of the contract, Mason shall designate, in writing, the name of the Contract Administrator who shall work with the contractor in formulating mutually acceptable plans and standards for the operations of this service. The Contract Administrator shall use all powers under the contract to enforce its faithful performance. The Contract Administrator shall determine the amount, quality and acceptability of work and shall decide all other questions in connection with the work. All direction and order from Mason shall be transmitted through the Contract Administrator, or their designee(s) however, the Contract Administrator shall have no authority to approve changes which shall alter the concept or scope of the work or change the basis for compensation to the contractor.

XVI. **PAYMENT TERMS / METHOD OF PAYMENT:**

PLEASE NOTE: THE VENDOR MUST REFERENCE THE PURCHASE ORDER NUMBER ON ALL INVOICES SUBMITTED FOR PAYMENT.

☐ Option #1- Payment to be mailed in 10 days-Mason will make payment to the vendor under 2%/10 Net 30 payment terms. Invoices should be submitted via email to the designated Accounts Payable email address which is acctpay@gmu.edu.

The 10-day payment period begins the first business day after receipt of proper invoice or receipt of goods, whichever occurs last. A paper check will be mailed on or before the 10th day.

☐ Option #2- To be paid in 20 days. The vendor may opt to be paid through our Virtual Payables credit card program. The vendor shall submit an invoice and will be paid via credit card on the 20th day from receipt of a valid invoice. The vendor will incur standard credit card interchange fees through their processor. All invoices should be sent to:

George Mason University
Accounts Payable Department
4400 University Drive, Mailstop 3C1
Fairfax, VA 22030
Voice: 703.993.2580 | Fax: 703.993.2589
e-mail: AcctPay@gmu.edu

☐ Option#3- Net 30 Payment Terms. Vendor will enroll in Paymode-X where all payments will be made electronically to the vendor's bank account. For additional information or to sign up for electronic payments, go to <http://www.paymode.com/gmu>. There is no charge to the vendor for enrolling in this service.

Please state your payment preference in your proposal response.

XVII. **SOLICITATION TERMS AND CONDITIONS:**

1. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over \$200,000, as a result of this solicitation, Mason will publicly post such notice on the DGS/DPS eVA web site (<https://eva.virginia.gov/>) for a minimum of 10 days.
2. BEST AND FINAL OFFER (BAFO): At the conclusion of negotiations, the offeror(s) may be asked to submit in writing, a best and final offer (BAFO). After the BAFO is submitted, no further negotiations shall be conducted with

the offeror(s).

3. CONFLICT OF INTEREST: By submitting a proposal the contractor warrants that they have fully complied with the Virginia Conflict of Interest Act; furthermore certifying that they are not currently an employee of the Commonwealth of Virginia.
4. DEBARMENT STATUS: By submitting a proposal, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting bids or proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
5. ETHICS IN PUBLIC CONTRACTING: By submitting a proposal, offerors certify that their proposal is made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
6. LATE PROPOSALS: To be considered for selection, proposals must be received in Mason's Bonfire Portal by the designated date and hour. The official time used in the receipt of proposals is the proposal due date and hour in Mason's Bonfire Portal. Proposals submitted after the due date and time has expired will not be accepted nor considered. Mason is not responsible for any delays related to Bonfire's website or vendor registration process. It is the responsibility of the offeror to ensure that their proposal is submitted by the designated date and hour.
7. MANDATORY USE OF MASON FORM AND TERMS AND CONDITIONS: Failure to submit a proposal on the official Mason form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of this solicitation may be cause for rejection of the proposal; however, Mason reserves the right to decide, on a case-by-case basis, in its sole discretion, whether to reject such a proposal.
8. OBLIGATION OF OFFEROR: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that are not understood. Mason will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries must be in writing and submitted as instructed on page 1 of this solicitation. By submitting a proposal, the offeror covenants and agrees that they have satisfied themselves, from their own investigation of the conditions to be met, that they fully understand their obligation and that they will not make any claim for, or have right to cancellation or relief from the resulting contract because of any misunderstanding or lack of information.
9. QUALIFICATIONS OF OFFERORS: Mason may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to Mason all such information and data for this purpose as may be requested. Mason reserves the right to inspect the offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. Mason further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy Mason that such offeror is properly qualified to carry out the obligations of the resulting contract and to provide the services and/or furnish the goods contemplated therein.
10. RFP DEBRIEFING: In accordance with §49 of the *Governing Rules* Mason is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. However, upon request we will provide a scoring/ranking summary and the award justification memo from the evaluation committee. Formal debriefings are generally not offered.
11. TESTING AND INSPECTION: Mason reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.

XVIII. RFP SCHEDULE (Subject to Change):

- Issue in eVA and Bonfire: 6/09/23
- Vendors submit questions by: 6/16/23 by 4:00 PM ET
- Post Question Responses: 6/21/23 by 5:00 PM ET
- Proposals Due: 7/6/23 @ 2:00 PM ET
- Proposals to Committee: 7/7/23

- Review and Score Proposals: 7/10/23 – 7/28/23
- Scores to Purchasing: 7/31/23
- Oral presentations (if necessary): TBD
- Negotiations/BAFO: TBD
- Award: 8/31/2023
- Contract Start Date: 9/1/2023

ATTACHMENT A: SMALL BUSINESS SUBCONTRACTING PLAN TO BE COMPLETED BY OFFEROR

Offerors must advise any portion of this contract that will be subcontracted. All potential offerors are required to include this document with their proposal in order to be considered responsive.

Small Business: "Small business (including micro)" means a business which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date and time for proposals. This shall also include DSBSD certified women- owned and minority-owned businesses and businesses with DSBSD service-disabled veteran owned status when they also hold a DSBSD certification as a small business on the proposal due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify.

Certification applications are available through DSBSD online at www.SBSD.virginia.gov (Customer Service).

Offeror Name: _____

Preparer Name: _____ **Date:** _____

Who will be doing the work: ☐ I plan to use subcontractors ☐ I plan to complete all work

Instructions

- A. If you are certified by the DSBSD as a micro/small business, complete Section A of this form.
- B. If the "I plan to use subcontractors" box is checked, complete Section B of this form. For the proposal to be considered and the offeror to be declared responsive, the offeror shall identify the portions of the contract that will be subcontracted to any subcontractor, to include DSBSD certified small business for the initial contract period in relation to the offeror's total price for the initial contract period in Section B.

Section A

If your firm is certified by the DSBSD provide your certification number and the date of certification.

Certification Number: _____ Certification Date: _____

Section B

If the "I plan to use subcontractors" box is checked, populate the requested information below, per subcontractor to show your firm's plans for utilization of any subcontractor, to include DSBSD-certified small businesses, in the performance of this contract for the initial contract period in relation to the offeror's total price for the initial contract period. Certified small businesses include but are not limited to DSBSD-certified women-owned and minority-owned businesses and businesses with DSBSD service-disabled veteran-owned status that have also received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. It is important to note that this proposed participation will be incorporated into the subsequent contract and will be a requirement of the contract. Failure to obtain the proposed participation dollar value or percentages may result in breach of the contract.

Plans for Utilization of Any subcontractor, to include DSBSD-Certified Small Businesses, for this Procurement

Subcontract #1

Company Name: _____ SBSD Cert #: _____
 Contact Name: _____ SBSD Certification: _____
 Contact Phone: _____ Contact Email: _____
 Value % or \$ (Initial Term): _____ Contact Address: _____
 Description of Work: _____

Subcontract #2

Company Name: _____ SBSD Cert #: _____
 Contact Name: _____ SBSD Certification: _____
 Contact Phone: _____ Contact Email: _____
 Value % or \$ (Initial Term): _____ Contact Address: _____
 Description of Work: _____

Subcontract #3

Company Name: _____ SBSD Cert #: _____
Contact Name: _____ SBSD Certification: _____
Contact Phone: _____ Contact Email: _____
Value % or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #4

Company Name: _____ SBSD Cert #: _____
Contact Name: _____ SBSD Certification: _____
Contact Phone: _____ Contact Email: _____
Value % or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____

Subcontract #5

Company Name: _____ SBSD Cert #: _____
Contact Name: _____ SBSD Certification: _____
Contact Phone: _____ Contact Email: _____
Value % or \$ (Initial Term): _____ Contact Address: _____
Description of Work: _____



Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, VA 22030
Voice: 703.993.2580 | Fax: 703.993.2589
<http://fiscal.gmu.edu/purchasing/>

ATTACHMENT B: CONTRACT GMU-1836-23

Note: Other documents may be incorporated into this document, either by way of attachment or by reference, but in all cases this contract document shall take precedence over all other documents and will govern the terms and conditions of the contract.

This Contract entered on this ____ day of _____, 2023 (Effective Date) by _____ hereinafter called “Contractor” (located at _____) and George Mason University hereinafter called “Mason,” “University”.

- I. **WITNESSETH** that the Contractor and Mason, in consideration of the mutual covenants, promises and agreement herein contained, agree as follows:
- II. **SCOPE OF CONTRACT:** The Contractor shall provide _____ for the _____ of George Mason University as set forth in the Contract documents.
- III. **PERIOD OF CONTRACT:** One year from the Effective Date with four (4) successive one-year renewal options. (or as negotiated)
- IV. **PRICE SCHEDULE:** As negotiated. The pricing specified in this section represents the complete list of charges from the Contractor. Mason shall not be liable for any additional charges.
- V. **CONTRACT ADMINISTRATION:** _____ shall serve as Contract Administrator for this Contract and shall use all powers under the Contract to enforce its faithful performance. The Contract Administrator shall determine the amount, quality and acceptability of work and shall decide all other questions in connection with the work. All direction and order from Mason shall be transmitted through the Contract Administrator, however, the Contract Administrator shall have no authority to approve changes which shall alter the concept or scope or change the basis for compensation.
- VI. **METHOD OF PAYMENT:** As negotiated
- VII. **THE CONTRACT DOCUMENTS SHALL CONSIST OF (In order of precedence):**
 - A. This signed form;
 - B. Negotiation Responses dated XXXXX (incorporated herein by reference);
 - C. RFP No. GMU-XXXX-XX, in its entirety (incorporated herein by reference);
 - D. Contractor’s proposal dated XXXXXX (incorporated herein by reference).
- VIII. **GOVERNING RULES:** This Contract is governed by the provisions of the Restructured Higher Education Financial and Administrative Operations Act, Chapter 10 (§ [23.1-1000](#) et seq.) of Title 23.1 of the Code of Virginia, and the “*Governing Rules*” and the *Purchasing Manual for Institutions of Higher Education and their Vendors*. Documents may be viewed at: <https://vascupp.org>.
- IX. **CONTRACT PARTICIPATION:** *As negotiated*. It is the intent of this Contract to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or affiliated corporations may access this Contract if authorized by the Contractor.

Participation in this Contract is strictly voluntary. If authorized by the Contractor, the contract will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor and shall fully and independently administer its use of the contract to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this Contract or execution of a separate agreement is required to participate; however, the participating entity

and the Contractor may modify the terms and conditions of the contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The University may request the Contractor provide semi-annual usage reports for all entities accessing the Contract. The University 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 the University 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 needed.

X. STANDARD TERMS AND CONDITIONS:

- A. **APPLICABLE LAW AND CHOICE OF FORUM:** This Contract shall be construed, governed, and interpreted pursuant to the laws of the Commonwealth of Virginia. All disputes arising under this Contract shall be brought before an appropriate court in the Commonwealth of Virginia.
- B. **ANTI-DISCRIMINATION:** By entering into this Contract, Contractor certifies to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §§ 9&10 of the *Governing Rules*. If Contractor is a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the Contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*Governing Rules*, § 36).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

- 1. During the performance of this Contract, the Contractor agrees as follows:
 - a. The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - b. The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, will state that such Contractor is an equal opportunity employer.
 - c. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting these requirements.
- 2. The Contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or Contractor.
- C. **ANTITRUST:** By entering into this Contract, the Contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under this Contract.
- D. **ASSIGNMENT:** Neither party will assign or otherwise transfer its rights or obligations under this Contract without both parties' prior written consent. Any attempted assignment, transfer, or delegation without such consent is void.
- E. **AUDIT:** The Contractor shall 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. Mason, its authorized agents, and/or state auditors shall have full access to and the right to examine any of said materials during said period.

- F. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that Mason shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this Contract.
- G. AUTHORIZED SIGNATURES: The signatory for each Party certifies that he or she is an authorized agent to sign on behalf such Party.
- H. BACKGROUND CHECKS: Contractor's employees (including subcontractors) performing services on any Mason campus must have successfully completed a criminal background check prior to the start of their work assignment/service. As stated in [University Policy Number 2221 – Background Investigations](#), the criminal background investigation 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. Signature on this Contract confirms your compliance with this requirement.
- I. CANCELLATION OF CONTRACT: Mason reserves the right to cancel this Contract, in part or in whole, without penalty, for any reason, upon 60 days written notice to the Contractor. Upon written notice of cancellation from Mason, Mason shall be fully released from any further obligation under the Contract and Contractor agrees to directly refund all payments, for services not already performed, to Mason, including any pre-paid deposits, within 14 days. 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.
- J. CHANGES TO THE CONTRACT: Changes can be made to this Contract in any of the following ways:
1. The parties may agree in writing to modify the scope of this Contract.
 2. Mason may order changes within the general scope of Contract at any time by written notice to Contractor. Changes within the scope of this Contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. Contractor shall comply with the notice upon receipt. Contractor shall be compensated for any additional costs incurred as the result of such order and shall give Mason a credit for any savings. Said compensation shall be determined by one of the following methods:
 - a. By mutual agreement between the parties in writing; or
 - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Mason's right to audit Contractor's records and/or to determine the correct number of units independently; or
 - c. By ordering Contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the Contract. The same markup shall be used for determining a decrease in price as the result of savings realized. Contractor shall present Mason with all vouchers and records of expenses incurred and savings realized. Mason shall have the right to audit the records of Contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to Mason within thirty (30) days from the date of receipt of the written order from Mason. If the Parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this Contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and Their Contractors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this Contract shall excuse the Contractor from promptly complying with the changes ordered by Mason or with the performance of the contract generally.
- K. CLAIMS: Contractual claims, whether for money or other relief, shall be submitted in writing no later than 60 days

after final payment. However, written notice of the Contractor's intention to file a claim shall be given at the time of the occurrence or beginning of the work upon which the claim is based. Nothing herein shall preclude a contract from requiring submission of an invoice for final payment within a certain time after completion and acceptance of the work or acceptance of the goods. Pendency of claims shall not delay payment of amounts agreed due in the final payment.

1. The firm must submit written claim to:
Chief Procurement Officer
George Mason University
4400 University Drive, MSN 3C5
Fairfax, VA 22030
 2. The firm must submit any unresolved claim in writing no later than 60 days after final payment to the Chief Procurement Officer.
 3. Upon receiving the written claim, the Chief Procurement Officer will review the written materials relating to the claim and will mail his or her decision to the firm within 60 days after receipt of the claim.
 4. The firm may appeal the Chief Procurement Officer's decision in accordance with § 55 of the *Governing Rules*.
- L. COLLECTION AND ATTORNEY'S FEES: The Contractor shall pay to Mason any reasonable attorney's fees or collection fees, at the maximum allowable rate permitted under Virginia law, incurred in enforcing this Contract or pursuing and collecting past-due amounts under this Contract.
- M. COMPLIANCE: All goods and services provided to Mason shall be done so in accordance with any and all applicable local, state, federal, and international laws, regulations and/or requirements and any industry standards, including but not limited to: the Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability and Accountability Act (HIPAA) and Health Information Technology for Economic and Clinical Health Act (HITECH), Government Data Collection and Dissemination Practices Act, Gramm-Leach-Bliley Financial Modernization Act (GLB), Payment Card Industry Data Security Standards (PCI-DSS), Americans with Disabilities Act (ADA), and Federal Export Administration Regulations. Any Contractor personnel visiting Mason facilities will comply with all applicable Mason policies regarding access to, use of, and conduct within such facilities. Mason's policies can be found at <https://universitypolicy.gmu.edu/all-policies/> and any facility specific policies can be obtained from the facility manager.
- N. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The Contractor shall ensure that personally identifiable information ("PII") which is defined as any information that by itself or when combined with other information can be connected to a specific person and may include but is not limited to personal identifiers such as name, address, phone, date of birth, Social Security number, student or personal identification numbers, driver's license numbers, state or federal identification numbers, biometric information, religious or political affiliation, non-directory information, and any other information protected by state or federal privacy laws, will be collected and held confidential and in accordance with this Contract, during and following the term of this Contract, and will not be divulged without the individual's and Mason's written consent and only in accordance with federal law or the Code of Virginia.
- O. CONFLICT OF INTEREST: Contractor represents to Mason that its entering into this Contract with Mason and its performance through its agents, officers and employees does not and will not involve, contribute to nor create a conflict of interest prohibited by Virginia State and Local Government Conflict of Interests Act (Va. Code 2.2-3100 *et seq*), the Virginia Ethics in Public Contracting Act (§57 of the *Governing Rules*), the Virginia Governmental Frauds Act (Va. Code 18.2 – 498.1 *et seq*) or any other applicable law or regulation.
- P. CONTINUITY OF SERVICES:
1. The Contractor recognizes that the services under this Contract are vital to Mason and must be continued without interruption and that, upon Contract expiration, a successor, either Mason or another contractor, may continue them. The Contractor agrees:
 - a. To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
 - b. To make all Mason owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the Contract to facilitate transition to successor; and

- c. That the University Procurement Officer shall have final authority to resolve disputes related to the transition of the Contract from the Contractor to its successor.
- 2. The Contractor shall, upon written notice from the Procurement Officer, furnish phase-in/phase-out services for up to ninety (90) days after this Contract expires and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the Procurement Officer's approval.
- 3. The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after Contract expiration that result from phase-in, phase-out operations). All phase-in/phase-out work fees must be approved by the Procurement Officer in writing prior to commencement of said work.
- Q. DEBARMENT STATUS: As of the Effective Date, the Contractor certifies that it is not currently debarred by the Commonwealth of Virginia from submitting bids or proposals on contracts for the type of services covered by this Contract, nor is the Contractor an agent of any person or entity that is currently so debarred.
- R. DEFAULT: In the case of failure to deliver goods or services in accordance with this Contract, Mason, after due oral or written notice, may procure them from other sources and hold Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which Mason may have.
- S. DRUG-FREE WORKPLACE: Contractor has, and shall have in place during the performance of this Contract, a drug-free workplace policy (DFWP), which it provides in writing to all its employees, vendors, and subcontractors, and which specifically prohibits the following on company premises, during work-related activities, or while conducting company business: the sale, purchase, manufacture, dispensation, distribution possession, or use of any illegal drug under federal law (including marijuana). For purposes of this section, "drug-free workplace" covers all sites at which work is done by Contractor in connection with this Contract.
- T. ENTIRE CONTRACT: This Contract constitutes the entire understanding of the Parties with respect to the subject matter herein and supersedes all prior oral or written contracts with respect to the subject matter herein. This Contract can be modified or amended only by a writing signed by all of the Parties.
- U. EXCLUSIVITY/NON-COMPETE: During the term of this Contract, Contractor shall not, directly or indirectly, provide or teach any similar or identical training content, classes, programs, courses, lectures or seminars, developed by or for Mason, to a similar coach training program that competes with Mason's Center for the Advancement of Well-Being's coach training program, within 25 miles of the city of Fairfax, Virginia. A similar coach training program shall be defined as any coach training program accredited by the International Coach Federation (ICF).
- V. FORCE MAJEURE: Mason shall be excused from any and all liability for failure or delay in performance of any obligation under this Contract resulting from any cause not within the reasonable control of Mason, which includes but is not limited to acts of God, fire, flood, explosion, earthquake, or other natural forces, war, civil unrest, accident, any strike or labor disturbance, travel restrictions, acts of government, disease, pandemic, or contagion, whether such cause is similar or dissimilar to any of the foregoing. Upon written notification from Mason that such cause has occurred, Contractor agrees to directly refund all payments to Mason, for services not yet performed, including any pre-paid deposits within 14 days.
- W. FUTURE GOODS AND SERVICES: Mason reserves the right to have Contractor provide additional goods and/or services that may be required by Mason during the term of this Contract. Any such goods and/or services will be provided by the Contractor under the same pricing, terms and conditions of this Contract. Such additional goods and/or services may include other products, components, accessories, subsystems or related services that are newly introduced during the term of the Contract. Such newly introduced additional goods and/or services will be provided to Mason at Favored Customer pricing, terms and conditions.
- X. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into this Contract Contractor certifies that they do not and will not during the performance of this Contract employ illegal alien workers or otherwise violate the provisions of the federal Immigration Reform and Control Act of 1986.
- Y. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless Mason, the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished

by the Contractor/any services of any kind or nature furnished by the Contractor, provided that such liability is not attributable to the sole negligence of Mason or to the failure of Mason to use the materials, goods, or equipment in the manner already and permanently described by the Contractor on the materials, goods or equipment delivered.

Z. INDEPENDENT CONTRACTOR: The Contractor is not an employee of Mason, but is engaged as an independent contractor. The Contractor shall indemnify and hold harmless the Commonwealth of Virginia, Mason, and its employees and agents, with respect to all withholding, Social Security, unemployment compensation and all other taxes or amounts of any kind relating to the Contractor's performance of this Contract. Nothing in this Contract shall be construed as authority for the Contractor to make commitments which will bind Mason or to otherwise act on behalf of Mason, except as Mason may expressly authorize in writing.

AA. INFORMATION TECHNOLOGY ACCESS ACT: Computer and network security is of paramount concern at Mason. Mason wants to ensure that computer/network hardware and software does not compromise the security of its IT environment. Contractor agrees to use commercially reasonable measures in connection with any offering your company makes to avoid any known threat to the security of the IT environment at Mason.

All e-learning and information technology developed, purchased, upgraded or renewed by or for the use of Mason shall comply with all applicable University policies, Federal and State laws and regulations including but not limited to Section 508 of the Rehabilitation Act (29 U.S.C. 794d), the Information Technology Access Act, §§2.2-3500 through 2.2-3504 of the Code of Virginia, as amended, and all other regulations promulgated under Title II of The Americans with Disabilities Act which are applicable to all benefits, services, programs, and activities provided by or on behalf of the University. The Contractor shall also comply with the Web Content Accessibility Guidelines (WCAG) 2.0. For more information please visit <http://ati.gmu.edu>, under Policies and Procedures.

BB. INSURANCE: The Contractor shall maintain all insurance necessary with respect to the services provided to Mason. The Contractor further certifies that they will maintain the insurance coverage during the entire term of the Contract and that all insurance is to be placed with insurers with a current reasonable A.M. Best's rating authorized to sell insurance in the Commonwealth of Virginia by the Virginia State Corporation Commission. The Commonwealth of Virginia and Mason shall be named as an additional insured. By requiring such minimum insurance, Mason shall not be deemed or construed to have assessed the risk that may be applicable to the Contractor. The Contractor shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverage. The Contractor is not relieved of any liability or other obligations assumed or pursuant to this Contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types.

1. Commercial General Liability Insurance in an amount not less than \$1,000,000 per occurrence for bodily injury or property damage, personal injury and advertising injury, products and completed operations coverage;
2. Workers Compensation Insurance in an amount not less than that prescribed by statutory limits; and, as applicable;
3. Commercial Automobile Liability Insurance applicable to bodily injury and property damage, covering owned, non-owned, leased, and hired vehicles in an amount not less than \$1,000,000 per occurrence; and
4. An umbrella/excess policy in an amount not less than five million dollars (\$5,000,000) to apply over and above Commercial General Liability, Employer's Liability, and Commercial Automobile Liability Insurance.

CC. INTELLECTUAL PROPERTY: Contractor warrants and represents that it will not violate or infringe any intellectual property right or any other personal or proprietary right and shall indemnify and hold harmless Mason against any claim of infringement of intellectual property rights which may arise under this Contract.

1. Unless expressly agreed to the contrary in writing, all goods, products, materials, documents, reports, writings, video images, photographs or papers of any nature including software or computer images prepared or provided by Contractor (or its subcontractors) for Mason will not be disclosed to any other person or entity without the written permission of Mason.
2. Work Made for Hire. Contractor warrants to Mason that Mason will own all rights, title and interest in any and all intellectual property rights created in the performance or otherwise arising from the Contract and will have full ownership and beneficial use thereof, free and clear of claims of any nature by any third party

including, without limitation, copyright or patent infringement claims. Contractor agrees to assign and hereby assigns all rights, title, and interest in any and all intellectual property created in the performance or otherwise arising from the Contract, and will execute any future assignments or other documents needed for Mason to document, register, or otherwise perfect such rights. Notwithstanding the foregoing, for research collaboration pursuant to subcontracts under sponsored research contracts administered by the University's Office of Sponsored Programs, intellectual property rights will be governed by the terms of the grant or contract to Mason to the extent such grant or contract requires intellectual property terms to apply to subcontractors.

- DD. NON-DISCRIMINATION: All parties to this Contract agree to not discriminate on the basis of race, color, religion, national origin, sex, pregnancy, childbirth or related medical conditions, age (except where sex or age is a bona fide occupational qualification, marital status or disability).
- EE. PAYMENT TO SUBCONTRACTORS: The Contractor shall take the following actions upon receiving payment from Mason: (1) pay the subcontractor within seven days for the proportionate share of the total payment received from Mason attributable to the work performed by the subcontractor under that Contract; or (2) notify Mason and subcontractor within seven days, in writing, of its intention to withhold all or a part of the subcontractor's payment with the reason for nonpayment. b. If an individual contractor, provide social security number in order to receive payment. c. If a proprietorship, partnership or corporation provide Federal employer identification number. d. Pay interest to subcontractors on all amounts owed by the Contractor that remain unpaid after seven days following receipt by the Contractor of payment from the Institution for work performed by the subcontractor under that Contract, except for amounts withheld as allowed by prior notification. e. Accrue interest at no more than the rate of one percent per month. f. Include in each of its subcontracts a provision requiring each subcontractor to include or otherwise be subject to the same payment and interest requirements with respect to each lower-tier subcontractor.
- FF. PUBLICITY: The Contractor shall not use, in its external advertising, marketing programs or promotional efforts, any data, pictures, trademarks or other representation of Mason except on the specific written authorization in advance by Mason's designated representative.
- GG. REMEDIES: If the Contractor breaches this Contract, in addition to any other rights or remedies, Mason may terminate this Contract without prior notice.
- HH. RENEWAL OF CONTRACT: This Contract may be renewed for two (2) successive one-year renewal options under the terms and conditions of this Contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the University's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
1. If the University elects to exercise the option to renew the Contract for an additional one-year period, the Contract price(s) for the additional one year shall not exceed the Contract price(s) of the original Contract increased/decreased by more than the percentage increase/decrease of the "other goods and services" category of the CPI-U section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available or 2%, whichever is lower.
 2. If during any subsequent renewal periods, the University elects to exercise the option to renew the Contract, the Contract price(s) for the subsequent renewal period shall not exceed the Contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the "other goods and services" category of the CPI-U section of the Consumer Price Index of the United States bureau of Labor Statistics for the latest twelve months for which statistics are available, or 2%, whichever is lower.
- II. REPORTING OF CRIMES, ACCIDENTS, FIRES AND OTHER EMERGENCIES: Any Mason Employee, including contracted service providers, who is not a staff member in Counseling and Psychological Services (CAPS) or a pastoral counselor, functioning within the scope of that recognition, is considered a "Campus Security Authority (CSA)." CSAs must promptly report all crimes and other emergencies occurring on or near property owned or controlled by Mason to the Department of Police & Public Safety or local police and fire authorities by dialing 9-1-1. At the request of a victim or survivor, identifying information may be excluded from a report (e.g., names, initials, contact information, etc.). Please visit the following website for more information and training: <http://police.gmu.edu/clery-act-reporting/campus-security-authority-csa/>."

- JJ. RESPONSE TO LEGAL ORDERS, DEMANDS, OR REQUESTS FOR DATA: Except as otherwise expressly prohibited by law, Contractor will: i) immediately notify Mason of any subpoenas, warrants, or other legal orders, demands or requests received by Contractor seeking University Data; ii) consult with Mason regarding its response; iii) cooperate with Mason's reasonable requests in connection with efforts by Mason to intervene and quash or modify the legal order, demand or request; and iv) upon Mason's request, provide Mason with a copy of its response.

If Mason receives a subpoena, warrant, or other legal order, demand (including request pursuant to the Virginia Freedom of Information Act) or request seeking University Data maintained by Contractor, Mason will promptly provide a copy to Contractor. Contractor will promptly supply Mason with copies of data required for Mason to respond, and will cooperate with Mason's reasonable requests in connection with its response.

- KK. SEVERABILITY: Should any portion of this Contract be declared invalid or unenforceable for any reason, such portion is deemed severable from the Contract and the remainder of this Contract shall remain fully valid and enforceable.
- LL. SOVEREIGN IMMUNITY: Nothing in this Contract shall be deemed a waiver of the sovereign immunity of the Commonwealth of Virginia and of Mason.
- MM. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent from Mason. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish Mason the names, qualifications and experience of their proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of this Contract. This paragraph applies to, but is not limited to, subcontractor(s) who process University Data.
- NN. SWaM CERTIFICATION: Contractor agrees to fully support the Commonwealth of Virginia and Mason's efforts related to SWaM goals. Upon contract execution, Contractor (as determined by Mason and the Virginia Department of Small Business and Supplier Diversity) shall submit all required documents necessary to achieve SWaM certification to the Department of Small Business and Supplier Diversity within 90 days. If Contractor is currently SWaM certified, Contractor agrees to maintain their certification for the duration of the Contract and shall submit all required renewal documentation at least 30 days prior to existing SWaM expiration at <https://www.sbsd.virginia.gov/>.
- OO. UNIVERSITY DATA: University Data includes all Mason owned, controlled, or collected PII and any other information that is not intentionally made available by Mason on public websites, including but not limited to business, administrative and financial data, intellectual property, and patient, student and personnel data. Contractor agrees to the following regarding University Data it may collect or process as part of this Contract:

1. Contractor will use University Data only for the purpose of fulfilling its duties under the Contract and will not share such data with or disclose it to any third party without the prior written consent of Mason, except as required by the Contract or as otherwise required by law. University Data will only be processed by Contractor to the extent necessary to fulfill its responsibilities under the Contract or as otherwise directed by Mason.
2. University Data, including any back-ups, will not be accessed, stored, or transferred outside the United States without prior written consent from Mason. Contractor will provide access to University Data only to its employees and subcontractors who need to access the data to fulfill Contractor's obligations under the Contract. Contractor will ensure that employees who perform work under the Contract have read, understood, and received appropriate instruction as to how to comply with the data protection provisions of the Contract and to maintain the confidentiality of the University Data.
3. The parties agree that as between them, all rights including all intellectual property rights in and to University Data shall remain the exclusive property of Mason, and Contractor has a limited, nonexclusive license to use the University Data as provided in the Contract solely for the purpose of performing its obligations under the Contract. The Contract does not give a party any rights, implied or otherwise, to the other party's data, content, or intellectual property, except as expressly stated in the Contract.
4. Contractor will take reasonable measures, including audit trails, to protect University Data against deterioration or degradation of data quality and authenticity. Contractor shall be responsible for ensuring that University Data, per the Virginia Public Records Act, is preserved, maintained, and accessible throughout

their lifecycle, including converting and migrating electronic data as often as necessary so that information is not lost due to hardware, software, or media obsolescence or deterioration.

5. Contractor shall notify Mason within three business days if it receives a request from an individual under any applicable law regarding PII about the individual, including but not limited to a request to view, access, delete, correct, or amend the information. Contractor shall not take any action regarding such a request except as directed by Mason.
6. If Contractor will have access to University Data that includes “education records” as defined under the Family Educational Rights and Privacy Act (FERPA), the Contractor acknowledges that for the purposes of the Contract it will be designated as a “school official” with “legitimate educational interests” in the University education records, as those terms have been defined under FERPA and its implementing regulations, and the Contractor agrees to abide by the limitations and requirements imposed on school officials. Contractor will use the education records only for the purpose of fulfilling its duties under the Contract for Mason’s and its end user’s benefit, and will not share such data with or disclose it to any third party except as provided for in the Contract, required by law, or authorized in writing by the University.
7. Mason may require that Mason and Contractor complete a Data Processing Addendum (“DPA”). If a DPA is completed, Contractor agrees that the information in the DPA is accurate. Contractor will only collect or process University Data that is identified in the DPA and will only handle that data (e.g., type of processing activities, storage, security, disclosure) as described in the DPA. If Contractor intends to do anything regarding University Data that is not reflected in the DPA, Contractor must request an amendment to the DPA and may not take the intended action until the amendment is approved and documented by Mason.

PP. UNIVERSITY DATA SECURITY: Data security is of paramount concern to Mason. Contractor will utilize, store and process University Data in a secure environment in accordance with commercial best practices, including appropriate administrative, physical, and technical safeguards, to secure such data from unauthorized access, disclosure, alteration, and use. Such measures will be no less protective than those used to secure Contractor’s own data of a similar type, and in no event less than reasonable in view of the type and nature of the data involved. At a minimum, Contractor shall use industry-standard and up-to-date security tools and technologies such as anti-virus protections and intrusion detection methods to protect University Data.

1. Immediately upon becoming aware of circumstances that could have resulted in unauthorized access to or disclosure or use of University Data, Contractor will notify Mason, fully investigate the incident, and cooperate fully with Mason’s investigation of and response to and remediation of the incident. Except as otherwise required by law, Contractor will not provide notice of the incident directly to individuals who’s PII was involved, regulatory agencies, or other entities, without prior written permission from Mason.
2. Mason reserves the right in its sole discretion to perform audits of Contractor, at Mason’s expense, to ensure compliance with all obligations regarding University Data. Contractor shall reasonably cooperate in the performance of such audits. Contractor will make available to Mason all information necessary to demonstrate compliance with its data processing obligations. Failure to adequately protect University Data or comply with the terms of this Contract with regard to University Data may be grounds to terminate this Contract.

QQ. UNIVERSITY DATA UPON TERMINATION OR EXPIRATION: Upon termination or expiration of the Contract, Contractor will ensure that all University Data are securely returned or destroyed as directed by Mason in its sole discretion within 180 days of the request being made. Transfer to Mason or a third party designated by Mason shall occur within a reasonable period of time, and without significant interruption in service. Contractor shall ensure that such transfer/migration uses facilities and methods that are compatible with the relevant systems of Mason or its transferee, and to the extent technologically feasible, that Mason will have reasonable access to University Data during the transition. In the event that Mason requests destruction of its data, Contractor agrees to destroy all data in its possession and in the possession of any subcontractors or agents to which the Contractor might have transferred University Data. Contractor agrees to provide documentation of data destruction to the University.

Contractor will notify the University of any impending cessation of its business and any contingency plans. This includes immediate transfer of any previously escrowed assets and University Data and providing Mason access to Contractor’s facilities to remove and destroy Mason-owned assets and University Data. Contractor shall implement its exit plan and take all necessary actions to ensure a smooth transition of service with minimal disruption to Mason.

Contractor will also provide a full inventory and configuration of servers, routers, other hardware, and software involved in service delivery along with supporting documentation, indicating which if any of these are owned by or dedicated to Mason. Contractor will work closely with its successor to ensure a successful transition to the new equipment, with minimal downtime and effect on Mason, all such work to be coordinated and performed in advance of the formal, final transition date.

- RR. UNIVERSITY REVIEW/APPROVAL: All goods, services, products, design, etc. produced by the Contractor for or on behalf of Mason are subject to Mason’s review and approval.
- SS. WAIVER: The failure of a party to enforce any provision in this Contract shall not be deemed to be a waiver of such right.

Contractor Name

George Mason University

Signature

Name: _____

Title: _____

Date: _____

Signature

Name: _____

Title: _____

Date: _____

**ATTACHMENT C - RFP ROLE SELECTION
TO BE COMPLETED BY OFFEROR**

A. Indicate what role(s) outlined in Section XI. Statement of Needs you are responding to:

Coaching Education Program Support:

- ☐ Director of Coaching Education*
- ☐ Coaching Vendor Administration for Executive Education Programs

B. List appropriate credentials and submit a copy of certifications:

C. * If you completed the PCC Markers Training, please list the completion date.

D. If you've previously served as an instructor or in a coach training support role at Mason, please list the modules or courses you've taught and/or support roles held (e.g. Learning Lab Advisor) as well as the dates of your previous performance.

To explain the remaining proposal requirements, please use a separate page for each role that you indicated interest in above.



Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, Va. 22030
Voice: 703.993.2580 | Fax: 703.993.2589
<http://fiscal.gmu.edu/purchasing/>

RFP ADDENDUM NO. 1:

Date: June 23, 2023
Reference: RFP # GMU-1836-23
Title: Leadership Coaching & Development Services
RFP Issued: June 9, 2023
Proposal Due Date: July 6, 2023 @ 2:00 PM ET

The following changes are hereby incorporated into the aforementioned RFP:

QUESTIONS/INQUIRIES: Submit all inquiries through [Mason's Bonfire Portal](#), no later than 4:00 PM Eastern Time (ET) on **June 16, 2023**. **All questions must be submitted through Mason's Bonfire portal.** For assistance with technical questions related to Bonfire, contact Support@GoBonfire.com or visit Bonfire's help forum at <https://vendorsupport.gobonfire.com/hc/en-us>. Responses to questions will be posted to Mason's Bonfire portal by 5:00 PM ET on **June 21, 2023**.

I hereby acknowledge receipt of RFP# GMU-1836-23, Leadership Coaching & Development Services

Name of Offeror/Firm

NAME (Print or typed)

Signature

Date



Ellen Fulton (M.S.ED., MCC) – Executive and Leadership Coach
“The door to leadership opens inward.” ~ Ellen Fulton

**PROPOSAL IN RESPONSE TO RFP FOR
GEORGE MASON UNIVERSITY
Leadership Coaching & Development Services
Ref: GMU-1836-23**

**PREPARED AND SUBMITTED BY:
ELLEN FULTON, M.S.ED., MCC
ELLEN@WASHINGTONCOACHINGGROUP.COM
(703) 362-0256**

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OFFER IN RESPONSE TO REQUEST FOR PROPOSAL

XI(1)	Director of Coaching Education: To demonstrate technical expertise, please explain your overall philosophy on your coaching and on coaching education. Indicate your number of years of experience as a coach, and explain your previous experience with coaching education, mentor coaching and preparing PCC coaches to earn the ICF Master Certified Credential. If you use specific models for learning and development, please indicate those, and explain your reasoning.
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Philosophy of Coach Training:

Coaching is a complex choreography of skills and awareness that all must come together at the same time. It requires the coach to be conscious of himself and deeply connected to the client, enabling him to pick up on language, non-verbal cues, energy, and what is *not* being said. This process requires the coach to have a great deal of personal awareness and ability to observe himself, his biases, and his contribution to the conversation while holding everything that is going on with the client. Coach training takes this masterful dance to an even more complex arena. The coach trainer must include and transcend, incorporating patience, mindfulness, and what is in the best service to the student's learning in the moment. A good coach training program is often described as the most impactful, self-reflective, and personally-transformational period of a person's life.

Multiple tracks of attention must be present in the successful delivery of a coach training experience. Specific focus must be grounded in the coaching competencies as outlined by the ICF. Coach training that excels will produce coaches who seamlessly dance touching all the competencies without ever having to think about them because they are intuitive. This process requires the coach trainer to help the student leverage the polarity of structure and flexibility. While the student is gaining the technical, structure skills required to understand coaching, he is being asked to let it all go and be fully present in the moment. This level of complexity is often confusing and requires the coach trainer to create a large enough container to support and challenge the student to experience the edges of this polarity.

Another track of attention for the coaching training program is the creating and fostering an environment of personal reflection and growth. A coach will not be successful walking a client into difficult waters if he himself has not walked into his own difficult waters. It is in this space that mindfulness, resilience, and well-being play a critical role. The best coach training will have its foundation in these concepts and daily practices will be offered to enhance the student's journey.

Leveraging cutting edge academic knowledge and deep experiential opportunities is a strong indicator of a thriving coach training experience that produces coaches who make a global impact on the profession.

Ellen Fulton as Director of Coaching Education:

“Beyond exceptional teaching and facilitating throughout the Mason Leadership Coaching program, Ellen Fulton served as a role model in two distinct ways. First, she’s an accomplished coach – and was able to demonstrate her coaching skill with real-time coaching in front of the group. This significantly aided our learning - to ‘see it done well’ – unscripted, and real. Secondly, Ellen’s personal commitment to well-being taught and supported student learning, modeling how to provide exceptional coaching, grounded in well-being concepts.”

-Robin Perry, Cohort 1

My philosophy of coach training has both influenced and been influenced by my experience serving as MCC Director of Training for the Leadership Coaching for Organizational Well-Being Program at George Mason University since its’ conception in 2016 and in the new creation of the Masterful Coaching Course. As the Director of Coaching Education, I serve on the leadership team to oversee the program development and delivery. I provide oversight of the curriculum, instructional processes, training of instructors, and all observation and examination processes. Building an exceptional team of coach trainers who can leverage all of coaching’s intricacies and who love what they do is of paramount importance to me.

The credentialed Director of Coaching Education is an ICF component requirement of becoming and maintaining Level 2 and Level 3 status with the International Coaching Federation for the Leadership Coaching for Organizational Well-Being Program. Directors of Level 3 programs must hold an active ICF MCC credential and subscribe to the ICF definition of coaching, Code of Ethics, and Core Competencies. I am intimately trained, aware, and skilled in the ICF competencies, ACC Bars, PCC Markers, and MCC Bars. My experience led me to support the growth and development of hundreds of coaches to the ACC and PCC levels of credentialing. Additionally, I have personally taught and mentored dozens of MCC candidates to a successful accomplishment of obtaining their MCC.

To date, there are approximately 1600 Master Certified Coaches globally. The process has been difficult and unclear which has been a deterrent for coaches to even try to achieve this credential. This obstacle has been negatively impacting the profession of coaching worldwide. It became clear to me that if people sought out training up until their Level 2 certification, which is PCC, and stopped, that this would cap the development of the profession. My calling to positively contribute to the extended growth and development of PCC coaches to obtain their MCC. In 2019, I started a program called Conversations2Mastery which is now the foundation for the Masterful Coaching Course at George Mason University.

To create an extraordinary experience for the coaching students, we must continually practice and grow as professionals. As Director of Coach Education, I must support and challenge the team of instructors by providing feedback and offering assistance at each turn. It is my goal to attract and develop the best coach training instructors, at all levels, to bring global recognition to the quality and experience students receive within the coach training opportunities available at George Mason University.

Mentor Coaching and Coach Training Experience:

Total years of experience as a mentor coach - 15

Total years of experience in coach training - 12

Mentoring other coaches has been a fundamental part of my career since I graduated from my own coach-training program at Georgetown University in early 2008. I was asked to participate in a coach-mentoring program for students going through their training. This was incredibly rewarding so I began to look for other opportunities to engage in the process of developing coaches. I volunteered to help as a final exam client and coach evaluator, thereby gaining critical experience, igniting a passion for the process of growing coaches and shaping the field of coaching.

In 2011, I joined a team of outstanding coaches at George Mason University and together we created the Advanced Coaching Program for Leadership and Organizational Well-Being. Assuming a very similar role to the Director of Coach Education, I served as a Co-Director for this program over the next four years, helping to make George Mason University a significant player in the coaching training world. The target participants in the Advanced Coaching program were established coaches who had successfully completed their Level 2 ICF training and who are looking to deepen their skills. I ensured that each instructor introduced concepts that deepened the participants' personal awareness and created impact with their coaching. I served as the anchor throughout each module, linking concepts to other concepts and to coaching, creating the container for greater complexity and expedient coach growth. These experiences were instrumental in my own development and preparation for my involvement with Mason to create the Leadership Coaching for Organizational Well-Being program. We are currently bringing our 14th cohort to a completion and preparing to welcome cohort 15.

Mentor coaching is a critical component of any coach training program and the continued development of all coaches. I have developed and managed mentor coaching programs for two additional coaching programs: The Center for Coach Development and Leaders Alive. Additionally, I coordinate Mentor Coaching Pods for coaches at all levels to include those who are using the portfolio path to achieving their ACC, those renewing their ACC, and those who are doing the portfolio path to MCC. I am a certified mentor coach through the ICF recognized program with inviteCHANGE.

ICF Marker Training for Evaluations:

Evaluating coaching skills has been a difficult challenge for the profession from the beginning. Because coaching involves so many complexities and the art is in how one navigates these complexities, evaluation has been plagued by subjectivity and vague rules of interpretation of these competencies. Up until now, evaluators and trainers have had to rely on deep analysis of the competencies with endless debates of behaviors to gain a common understanding. Personally, I participated in several competency tune-up classes, evaluation trainings, and deep thoughtful debate with colleagues to formulate my basis of understanding. This information and experience is what guides the training I give coach educators and participants.

Over the last couple of years, the ICF created markers for each competency to make more explicit behaviors that an evaluator must notice to meet the requirements of a PCC level recording. At Mason, we have used these markers to enhance our evaluation capabilities and ensure that our evaluation process is fair, consistent, valid, repeatable, and defensible. At the MCC level we do not have markers to support our evaluations. I have interviewed dozens of MCCs to create a robust understanding supported by the ICF MCC bars which supports my ability to grow PCCs to the MCC level. Coaching at the MCC level is a jump from the technical skills exhibited to be a good coach, into an artful dance with deep presence and partnership which transcends the conscious awareness of markers. Those technical skills must be embodied and the authentic connection between coach and client revealed.

Models for Learning and Development:

Models are useful for helping students absorb the concepts and translate the meaning for their own integration. There are a few models that are particularly helpful in creating awareness and developing meaning.

The Kolb Cycle is an excellent representation of the process of coaching, learning to coach, and helping students understand what may not have been visible in their consciousness about their learning. An effective coach training program will create opportunities for the students to progress through a cycle of four stages: (1) having a concrete experience followed by (2) observation and reflection around the experience which leads to (3) the formation of abstract concepts or analysis and conclusions, which then are used to (4) test hypothesis and try out new ways of doing things.

The Observer – Action – Results model (OAR) is another model to support the creation of awareness and the development of the students' ability to observe themselves in any given situation. This second order learning is made possible when we question who we are as an observer, how we look at things, and opens opportunities for new results.

The BEL model (Body, Emotion, and Language) is helpful in setting a container of domains of coaching for students to explore in their coaching sessions. One addition to this model that is important to add is the domain of meaning and purpose. At the core of authentic transformational awareness is the understanding of the values, meaning and purpose behind what is being said.

George Mason's Resilience Model is a powerful tool for coaches to absorb. Exploring coaching questions around (1) Meaning in Life, (2) Positive Emotions, (3) Social Support, (4) Coping, and (5) Physical Well-Being can greatly influence a person's capacity to build resilience in their life.

XI(2)	Proposal Requirements Coaching Vendor Administration: Please describe your coach selection and assignment process and your experience and approach to coaching vendor administration for leadership development programs. Submit names, accreditations, educational degrees of coaches, number of hours of coaching experience, and an example of your monthly coaching report.
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Introduction:

The Washington Coaching Group is proud to have been part of supporting George Mason University Executive Education programs since 2009. Our program knowledge and proven track record of service and commitment is unparalleled. We have years of experience with George Mason University successfully managing multiple, simultaneous coaching contracts of approximately 100 participants in each program. Every coach is highly skilled, vetted, and accredited by the International Coach Federation (ICF) with a deep embodiment of the concepts of strengths-based leadership, resilience, and well-being. Ellen Fulton, a Master Certified Coach (MCC), manages all coaching logistics, supervision of the coaches, and communications. Ellen served as the past Director of the Mason Institute for Leadership Excellence (predecessor to the Leading to Well-Being programs) between November 2011 and June 2015, giving her deep-rooted client relationships and industry knowledge as well as invaluable organizational understanding.

Coach Selection and Assignment Process:

All coaches are strictly vetted and hold an International Coaching Federation credential. Our team members are leaders in the field of coaching, contributing back by serving in such roles as faculty in coach training programs or leadership programs, changing the landscape of knowledge around speech acts, or contributing to work around mindfulness and resilience. Essential to our approach and philosophy of coaching is an embodied understanding of strengths-based leadership, resilience, and well-being. It is for this reason that we select often coaches who have experienced learning through George Mason University in one of our coaching offers. We have the capacity to grow our team to meet the needs of multiple, simultaneous coaching programs through our extensive network of coaches. MCC only contracts are beginning to pick up in popularity and can sometimes be difficult to staff. Through our extensive network, we have capacity to tap into one of the largest pools of MCC coaches to meet the needs of these contracts.

The assignment process varies depending on the size of the group. For more intimate-sized groups, we offer a participant selection process that allows for the coachee to review and speak with multiple coaches before selecting one. With larger groups, the participants get to meet the coaches and sign-up with the coach they like who meets their scheduling needs. During the participants' classroom experience, we provide a coaching overview and introduction to the coaches. Coaching is a highly personal experience and we understand that not all coaches will be the perfect match for all participants. If at any time the participant or coach believes the coaching is not working as desired, either party may communicate this to determine the appropriate path to maximize the experience for the participant.

Experience and Approach:

According to The International Personnel Management Association:

“Training accompanied by coaching can improve performance 88%. This is in contrast to training alone, which improves performance by only 22%.”

To maximize each client’s performance, we take the following approach:

- Enhance and support participants’ integration of knowledge, skills, and self-awareness gained through their experiences with their work or program;
- Work collaboratively to meet the shifting needs that may arise with George Mason University and the participant group;
- Provide the most cutting edge leadership coaching services available to challenge high potential clients to expand their thinking; and
- Commit to new actions aimed at achieving goals in support of their change initiative, personal and professional effectiveness, and organizational well-being.

Sample Monthly Coaching Report:

Center for the Advancement of Well-Being MLDP October 2022 Coaching Status Report					
Prepared by the Washington Coaching Group					
Contract period: September 2022 – December 2022					
Contract Agreement Total Hours Allotted			48		
Total Hours Used to Date			35		
Hours Completed in October			12		
Detailed report					
Session Date	Client Name	Session Length	Method of Delivery	Hours Completed	Hours Remaining
10/1/22	Sally S.	1	By Phone	2	2
10/5/22	Roger B.	1	In Person	2	2
10/9/22	Bill C.	1	By Phone	3	1
10/11/22	Kevin W.	1	No Show	3	1
10/16/22	Tom T.	1	In Person	2	2
10/18/22	Alan R.	1	By Phone	2	2
10/23/22	Wendy Z.	1	By Phone	3	1
10/24/22	Sue P.	1	By Phone	3	1
10/26/22	Bob D	1	By Phone	4	0
10/29/22	Calvin R	1	By Phone	4	0
10/30/22	Timmy B.	1	Late Cancel	3	1
10/31/22	Whitney W	1	In Person	4	0
Total		12		35	13

XIII(B)(2)	Offerors must submit an executive summary at the beginning of the proposal response not to exceed 2 pages.
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The Washington Coaching Group has a long history of partnership with George Mason University and is uniquely positioned to support the mission of the Center for the Advancement of Well-Being. The synergy evoked within this partnership lends to a seamless team experience with united values and branding. By being in this together, the Washington Coaching Group has enhanced the Center for the Advancement of Well-Being's reputation as being a global leader in Coach Education and Leadership Development. We share the dedication to helping individuals and organizations thrive in a world of complexity and uncertainty. By promoting the science and practices that lead to a life of vitality, purpose, resilience, and engagement, the leaders and coaches we develop serve as catalysts of human well-being that ripple across the globe and effect millions of people.

Ellen Fulton, MCC with the Washington Coaching Group has been on this fabulous journey with CWB from the very beginning in 2009 when Dr. Nance Lucas assembled a group of people to design a public offering that would bring together industry leaders, leadership scholars, and coaches in a new and transformational way. This was the seed for what is now the Center for the Advancement of Well-Being and it's Leading to Well-Being leadership development programs. Shortly thereafter in 2010, Dr. Pam Patterson brought together a group of trusted coaches and the first George Mason coaching program was launched in 2011 with Ellen serving as Co-Director for this Advanced Coaching Program for Leadership and Organizational Well-Being program.

Since those early days, the Washington Coaching Group has provided coaching services for more than 20 different Leadership Development programs offered through CWB. Additionally, Ellen has served in the Co-Director or MCC Director of Coach Education for almost 20 different Coach Education programs offered with George Mason University. It is within this dynamic that both offerings, Leadership Development and Coach Development, thrive. Every George Mason Coach learns and develops the art of their coaching with the core values of CWB taught and embedded in each step of their learning. Some of the best coaches in the world are being developed by George Mason coaching programs. With Ellen's deep involvement within Coach Education at Mason, she can hire the best of the best to be coaches into the CWB Leadership Development programs. Everyone wins ensuring quality and branding throughout areas of CWB programming.

Ellen Fulton, MCC of the Washington Coaching Group, is not only dependable and passionate about the partnership with Mason and CWB, but also stays current through incalculable hours of independent study of all global coaching trends and changes to certification requirements so she is uniquely qualified to assist George Mason with its coaching endeavors. When situations arise that call for extra support or creative thinking, Ellen Fulton has a proven track record of going the extra mile to get things done. She is adaptable and true team player, seamlessly working with others withing CWB. Her global network of coaches keeps her abreast of trends and shifts in the coaching profession. She is a pioneer in Coach Education developing a course called Conversations2Mastery which was designed to support PCC coaches to the top level MCC credential. 95% of participants who completed Conversations2Mastery were successfully awarded their MCC by the International Coaching Federation. This program is now the foundation of the Masterful Coaching Course at Mason. Ellen serves as the current MCC Director of Coach

Education and is supporting in the effort to achieve Level 3 ICF accreditation. When this accreditation is complete, George Mason University will be one of only a few accredited Level 3 coaching programs globally and potentially the only Level 3 coaching program seated within a university setting.

XIII(B)(3)(a)	Background and brief history of your company.
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Background and History of the Washington Coaching Group:

The Washington Coaching Group was established in 2008 offering coaching services for Non-Profits and the Federal Government. In 2009, we coached our first George Mason employee and supported the GMU Executive MBA program with team coaching and a Coaching Skills for Managers program. Talks began at this point with New Century College to create a public leadership training program by bringing together industry leaders, leadership scholars, and coaches for the transformational programs that are now the foundation of the Leading to Well-Being programs with the Center for the Advancement of Well-Being. The Washington Coaching Group partnered to support most of the leadership programs offered since 2010. As these programs have continued to grow, so has our coaching team. Nearly 100% of the coaches used for Mason Executive Leadership Programs are George Mason faculty and trained coaches, grounded in the George Mason brand of strengths-based leadership, resilience, and well-being.

Simultaneously, talks began and ultimately resulted in the creation of Mason's first coaching program grounded in the Mason values. This program was the Advanced Coaching Program for Leadership & Organizational Well-Being launched in 2011. Ellen Fulton, MCC of the Washington Coaching Group served and continues to serve in the creation, coordination, and implementation of all coaching programs through what is now the Center for the Advancement of Well-Being. Those programs include the Leadership Coaching for Organizational Well-Being, which is completing its 14th cohort now, and the Masterful Coaching Course preparing for cohort 2 in the fall.

XIII(B)(3)(b)	Names, qualifications and experience of personnel to be assigned to work with Mason.
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Here is Washington Coaching Group's team at a glance:

ICF Cred	Name	Experience Hours	Education
MCC	Ellen Fulton	10,000 +	BS Counseling / MEd Counseling
MCC	Sarah Happel	3,000 +	BA Journalism / MS Mass Communications
MCC	Jennifer Starr	10,000 +	BA Art and Psychology
MCC	Sarah Sutton	3,500 +	BA English and Sociology / MS Exercise Science
MCC	Annette Hurley	10,000 +	BS Social Work / MA Human Resource Dev
MCC	Felix Villanueva	4,000 +	BS Biology / M.Div / Ed.D Organizational Leadership
MCC	Lyssa deHart	10,000 +	BFA Photography and Art History / MSW Social Work

MCC	Susan Sussman	3,000 +	BS English / Med Group Dynamics
PCC	Chelese Perry	1,500 +	BS Business Administration
PCC	Eric Woodard	1,500 +	BA Biology / MA International Affairs / EdD Org Learning
PCC	Larisa Harrington	2,000 +	20 years U.S. Air Force Turkish Linguist and Readiness
PCC	Marlene Thomas	2,000 +	BS Tech and Management / MS Management
PCC	Michael Rochelle	2,000 +	BA Foreign Language Ed / MA Public Administration
PCC	L'Lorenzo Seabrook	2,500 +	BS Management / MBA Leadership / EDd Leadership

Their full resumes are provided as additional materials found at the end of this document.

XIII(B)(3)(c)	No fewer than three (3) references that demonstrate the Offeror's qualifications, preferably from other comparable higher education institutions and client organizations your company is/has provided services with and that are similar in size and scope to that which has been described herein. Include a contact name, contact title, phone number, and email for each reference and indicate the length of service.
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Name: Melissa Schreiberstein, M.S., ACC

Organization: The Leadership Project, LLC (leadershipprojectcoach.com)

Title: Leadership Coach

Phone #: 202-441-4611

Email: melissa@leadershipprojectcoach.com

Length of service for coaching vendor work: 3 years

LCOWB Cohort # 1

Notes: This reference can speak to: 1- Work providing coach vendor services for George Mason University Leading to Well-Being programs between 2019-2022. 2- She can also speak to work as Director of Education for the LCOWB program between 2019-2022. Additionally, this reference can speak from a personal experience of being a participant in the LCOWB in addition to participating in a Washington Coaching Group Mentor Coaching Pod program.

Name: Scott Montgomery, ACC

Organization: Worldagte LLC

Title: Chief Customer Officer

Phone #: 703-283-4524

Email: smontgomery@worldgatellc.com

Length of service for coaching vendor work: 2 years

LCOWB Cohort # 4

Notes: This reference can speak to: 1- Work providing coaching vendor services into an educational organization. 2 – Experience as a participant in our LCOWB coaching program and two contracts of individual mentor coaching.

Name: Gregory H. Sims

Organization: Continual Learning and Leadership Branch, Training Operations Division, Training and Development, Transportation Security Administration

Title: Program Manager Rising Leaders Development Program (RLDP)

Phone #: 202-657-3656 (Mobile) 571-227-3340 (Office)

Email: Gregory.Sims@tsa.dhs.gov

Length of service for coaching venter work: 7 years

Notes: This reference can speak to his organization's experience with the coaching received during their experience with CWB during the Rising Leaders Development Program with TSA.

Name: Amy Armstrong, PCC

Organization: The Center for Coach Development / The Center for Family Resolution

Title: Lead Faculty, Coach (Coaching Program Owner)

Phone #: 614-208-8383

Email: amyarmstrong@thecenterforfamilyresolution.com

Length of service for Coaching Education Support and Development: July 2020 - Present
LCOWB Cohort # 8

Notes: This reference can speak to: Coaching Program Development, teaching and mentor coaching from the perspective of support for Level 1 program and as a participant in our LCOWB coaching program.

Name: Talie Davis-Weir, PCC

Organization: Leaders Alive and Certified Coaching Academy

Title: Life & Personal Development Coach, and Trainer (Coaching Program Owner)

Phone #: 614-464-7295

Email: leadersaliveicf@gmail.com

Length of service for Coach Education work: 3.5 years

Notes: This reference can speak to: Coaching Program Development, teaching and mentor coaching from the perspective of support for the development and implementation of a Level 2 program and as a participant in the Center for Coach Development coaching program.

Name: Martha Wescoat-Andes, ACC

Organization: William & Mary, Senior Associate Provost for Planning & New Ventures

Title: MWA Leadership & Wellness Coaching, LLC

Phone #: 530-519-1642

Email: mwescoatandes@yahoo.com

Advanced Coaching Program in Leading to Well-Being, GMU, 2015

Coaching Mentorship, Fall 2022

Notes: This reference can speak to: Experience as a participant in our Advanced Coaching Program and participation in a Washington Coaching Group Mentor Coaching Pod program.

Name: Sarah Happel, MCC

Organization: Spectrum Leadership Solutions

Title: Founder & President

Phone #: 703-717-2766

Email: Sarah@SpectrumLeadershipSolutions.com

Length of service for Coach Education work: Fall 2016 – present

Notes: This reference can speak to: Coach Education work from the perspective of program development and implementation with LCOWB. Additionally, this reference was a participant of Washington Coaching Group's program Conversations2Mastery that developed PCC coaches to the MCC credential level. Conversations2Mastery was the foundation of the current GMU Masterful Coaching Course.

Name: Susan Paley, ACC

Organization: Bright Spots Coaching, LLC

Title: Founder and Executive Leadership Coach

Phone #: 703-915-6574

Email: susan@brightspotscoaching.com

LCOWB Cohort # 6

Dates of Coaching Mentorship: Oct - Dec, 2022

Notes: This reference can speak to: Experience as a participant in our LCOWB coaching program and participation in a Washington Coaching Group Mentor Coaching Pod program.

Name: Heather Wiser Soubra, ACC

Organization: Wiser Way Coaching

Title: Founder and CEO

Phone #: 703-395-1968

Email: heather@wiserwaycoaching.com

LCOWB Cohort # 6

Dates of Coaching Mentorship: November 2022- January 2023

Notes: This reference can speak to: Experience as a participant in our LCOWB coaching program and participation in a Washington Coaching Group Mentor Coaching Pod program.

Name: Laura Lenz, ACC

Organization: Pherson Associates, LLC

Title: Leadership Coach / Director of Analytic Tradecraft Programs

Phone #: 703-362-9930

Email: llenz@pherson.org

LCOWB Cohort #: 6

Dates of Coaching Mentorship: October, 2022-January 2023

Notes: This reference can speak to: Experience as a participant in our LCOWB coaching program and participation in a Washington Coaching Group Mentor Coaching Pod program.

Name: Cynthia Legg, CPA, ACC

Organization: Inspired Success

Title: President/Senior Organizational Consultant & Executive Coach

Phone #: 540-422-5970

Email: cindy@inspired-success.com

LCOWB Cohort #6

Dates of Coaching Mentorship: October – December 2022

Notes: This reference can speak to: Experience as a participant in our LCOWB coaching program and participation in a Washington Coaching Group Mentor Coaching Pod program.

Director of Coaching Education

XIII(B)(3)(d)	For each service proposed from section XI, Statement of Needs, include a brief paragraph summarizing your experience and expertise: Director of Coaching Education.
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Ellen Fulton's mission within Coach Education is to elevate the skill, partnership, and art of coaching within the global coaching profession. Ellen thrives in the development of coaches from before they take their first coaching step through their dance into masterful coaching at the Master Certified Coach level. She has a proven track record of developing hundreds of coaches to various levels of ICF credential to include MCC. Whether she is running an ICF accredited coaching program, supporting new coaching programs in emerging markets (such as the Ohio Courts or Life Coaching with massage therapist), running mentor coaching pods, or providing a workshop for an ICF chapter, Ellen remains a steadfast agent for the development of coaches and the global profession of coaching.

XIII(B)(3)(d)(i)-	Up to a 2-page, project-based resume with education, certifications, and 2-4 sentences on each project that relates to the service proposed. Include durations with months and years the project occurred.
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Objective

To secure the role of Director of Coach Education and continually enhance George Mason University's Center for the Advancement of Well-Being as a global leader in Coach Education and leadership development.

Key Project Accomplishments

MCC Director of Training – Masterful Coaching Course

September 2022 - Present (9 months)

George Mason University – Center for the Advancement of Well-Being

- Build and implement ICF Level 3 program to support coach growth to MCC credential
- Demonstrate and explore Masterful Coaching Distinctions
- Observe and evaluate participant coaching
- Support in the ICF program credentialing process

MCC Director of Training - Leadership Coaching for Organizational Well-Being

September 2015 - Present (7 years, 9 months)

George Mason University – Center for the Advancement of Well-Being

- Leadership team member to conceptualize, build and implement certificate program
- Train and oversee faculty
- Recruit and support participants in their growth and development as a coach
- Teach coaching competencies

Founder and Faculty – Conversations2Mastery

July 2019 – August 2022 (3 years, 1 month)

Washington Coaching Group

- Build and implement ICF CCE Certificate program to support coach growth to MCC credential
- Demonstrate and explore Masterful Coaching Distinctions
- Observe and evaluate participant coaching

Faculty/Mentor Coach – Life Coaching Certificate

November 2021 – present (1 year, 7 months)

Leaders Alive

- Support curriculum development and ICF credentialling
- Teach coaching competencies
- Mentor Coaching

Faculty/Mentor Coach – Foundations Certificate Program

August 2020 - Present (2 years, 10 months)

Center for Coach Development

- Support curriculum development and ICF level 1 credentialling
- Teach coaching competencies
- Mentor Coaching

Co-Director - Advanced Coaching Program for Leadership & Organizational Well-Being

June 2011-2014 (3 years)

George Mason University – Center for the Advancement of Well Being

- Leadership team member to conceptualize, build and implement certificate program
- Train and oversee faculty
- Recruit and support practicing coaches in their growth and development

Education

Georgetown University – Leadership Coaching Certificate, 2008

Old Dominion University – Master of Science in Education –in Guidance and Counseling, 1992

Old Dominion University – Bachelor of Science – BS in Human Services Counseling, 1989

Certifications

Master Certified Coach (MCC) by the International Coach Federation

Certified Mentor Coach by inviteCHANGE

Polarity Partners PACT Certified

Certified in Voices 360, Leadership Circle Profile, viaEDGE, and DISC

Commonly used: Strengthsfinder, VIA Character Strengths, MBTI, other 360

XIII(B)(4)(a)	Specific Plan for providing services as the Director of Coaching Education, including our approach to providing the services.
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As the Director of Coaching Education, Ellen Fulton, MCC strives always be collaborative, adaptive, creative, detailed, and responsive. Our coaching programs serve our participants, the Mason community, our colleagues, the coaching profession, and everyone who encounters a Mason Coach. Quality, professionalism, and masterful skills grounded in the science and practices that lead to a life of vitality, purpose, resilience and engagement are essential in the development of our coaches and support them to thrive in complexity and uncertainty. Ellen, continually works to develop each coach individually, to include faculty, and cultivates the collective knowledge of the team making Mason Coaching programs globally recognized.

XIII(B)(4)(b)	Specific Plan for providing services as Director of Coaching Education, including what, when and how services will be performed.
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Currently all coaching programs offered at Mason made the transition to virtual during COVID using the Zoom platform. Having a virtual platform has expanded our reach attracting participants from all over the country and abroad. While this has been powerful, the coaching team is considering potential in-person or hybrid options that will be attractive to a different group of individuals.

COACHING VENDOR ADMINISTRATION FOR EXECUTIVE EDUCATION PROGRAMS

XIII(B)(3)(d)	For each service proposed from section XI, Statement of Needs, include a brief paragraph summarizing your experience and expertise: Coaching Vendor.
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The Washington Coaching Group is proud to have been part of supporting George Mason University Executive Education programs since 2009. Our program knowledge and proven track record of service and commitment is unparalleled. Our work has dovetailed the Center for the Advancement of Well-Being through our deep partnership over the past 14 years, influencing our commitment to helping individuals and organizations thrive in a world of complexity and uncertainty. Nearly 100% of our coaches are Mason trained or instructors in the Mason coaching programs.

XIII(B)(3)(d)(i)-	Up to a 2-page, project-based resume with education, certifications, and 2-4 sentences on each project that relates to the service proposed. Include durations with months and years the project occurred.
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Objective

To secure the role of Coaching Vendor Administration for Executive Education Programs at George Mason University.

Key Project Accomplishments

Leadership Program Support: Coaching Vendor Support

January 2018 - Present (5 years, 7 months)

George Mason University – Center for the Advancement of Well-Being

- Provided coaching services to support 16 different Leadership Development Courses offered by the Center for the Advancement of Well-Being ranging in size from 24-100 participants receiving 1 or 2 coaching sessions each.
- Ensure coaching excellence and alignment with Mason Coaching and Leadership branding
- Partner with CWB program faculty and administration for curriculum support, scheduling, and reporting
- Successes: High ratings on evaluation forms and many requests for more coaching
- Challenges: Busy leaders often struggle to maintain their calendars which resulted in some no shows for the coaching which we worked to reschedule. Through collaboration with our program partners, we now have the organization send out reminder emails to participants about their scheduled coaching session

Coaching Vendor Support into the School District of Philadelphia

June 2021 – Present (2 years, 1 month)

Worldgate, LLC

- Provide **MCC Only Coaching Services** to 13 School District of Philadelphia executives receiving either weekly or biweekly coaching.
- Ensure coaching excellence in support of the School District of Philadelphia leadership goals
- Partner with the School District of Philadelphia, Worldgate, and participants to schedule and track progress
- Successes: Very positive feedback leading to the expansion of this coach offering to more employees and the participation of all the top leadership in the department
- Challenges: In the beginning of the second tier of leadership joining the coaching offer, we experienced some no shows and some late cancellations. We worked with the School District leadership to make coaching a priority and bring clarity to the expectations between Supervisors and their team.

Leadership Program Support: Coaching Vendor Support

September 2010 – December 2017 (7 years, 3 months)

George Mason University – New Century College and Mason Institute for Leadership Excellence

- Provided coaching services to support 8 different Leadership Development Courses offered by the Mason Institute for Leadership Excellence through New Century College the ranging in size from 30-100 participants receiving 1 or 2 coaching sessions each.
- Ensure coaching excellence and alignment with Mason Coaching and Leadership branding
- Partner with CWB program faculty and administration for curriculum support, scheduling, and reporting
- Successes: Coaching consistently received high marks on evaluations and was often one of the many highlights of integrating a leader's experience with Mason Leadership Programs.
- Challenges: In the early days of Mason Leadership programs, open-enrolment programs were offered which tended to be difficult to fill. As relationships were built and client organization programs began, the coaching continued to support the learning and a rhythm was created.

Coaching Vendor References:

Name: Melissa Schreiberstein, M.S., ACC

Organization: The Leadership Project, LLC (leadershipprojectcoach.com)

Title: Leadership Coach

Phone #: 202-441-4611

Email: melissa@leadershipprojectcoach.com

Length of service for coaching vendor work: 3 years

Notes: This reference can speak to the work providing coach vendor services for George Mason University, Center for the Advancement of Well-Being, Leading to Well-Being programs between 2019-2022.

Name: Gregory H. Sims

Organization: Continual Learning and Leadership Branch, Training Operations Division, Training and Development, Transportation Security Administration

Title: Program Manager Rising Leaders Development Program (RLDP)

Phone #: 202-657-3656 (Mobile) 571-227-3340 (Office)

Email: Gregory.Sims@tsa.dhs.gov

Length of service for coaching vendor work: Since the Launch of RLDP in 2016

Name: Scott Montgomery, ACC

Organization: Worldgate LLC

Title: Chief Customer Officer

Phone #: 703-283-4524

Email: smontgomery@worldgatellc.com

Length of service for coaching vendor work: 2 years

Notes: This reference can speak to work providing coaching vendor services into the School District of Philadelphia.

XIII(B)(3)(d)(ii)-	If responding to the Coaching Vendor Support requirement (XI, A) include up to three past performance descriptions, no longer than a page each. Include a full project description, including successes and challenges, with dates, and a client reference with phone and email contact information.
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Leadership Program Support: Coaching Vendor Support

January 2018 - Present (5 years, 7 months)

George Mason University – Center for the Advancement of Well-Being

- Provided coaching services to support 16 different Leadership Development Courses offered by the Center for the Advancement of Well-Being ranging in size from 24-100 participants receiving 1 or 2 coaching sessions each.
- Ensure coaching excellence and alignment with Mason Coaching and Leadership branding
- Partner with CWB program faculty and administration for curriculum support, scheduling, and reporting
- Successes: High ratings on evaluation forms and many requests for more coaching
- Challenges: Busy leaders often struggle to maintain their calendars which resulted in some no shows for the coaching which we worked to reschedule. Through collaboration with our program partners, we now have the organization send out reminder emails to participants about their scheduled coaching session

Coaching Vendor Support into the School District of Philadelphia

June 2021 – Present (2 years, 1 month)

Worldgate, LLC

- Provide ***MCC Only Coaching Services*** to 13 School District of Philadelphia executives receiving either weekly or biweekly coaching.
- Ensure coaching excellence in support of the School District of Philadelphia leadership goals
- Partner with the School District of Philadelphia, Worldgate, and participants to schedule and track progress
- Successes: Very positive feedback leading to the expansion of this coach offering to more employees and the participation of all the top leadership in the department
- Challenges: In the beginning of the second tier of leadership joining the coaching offer, we experienced some no shows and some late cancellations. We worked with the School District leadership to make coaching a priority and bring clarity to the expectations between Supervisors and their team.

Leadership Program Support: Coaching Vendor Support

September 2010 – December 2017 (7 years, 3 months)

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- Provided coaching services to support 8 different Leadership Development Courses offered by the Mason Institute for Leadership Excellence through New Century College the ranging in size from 30-100 participants receiving 1 or 2 coaching sessions each.
- Ensure coaching excellence and alignment with Mason Coaching and Leadership branding
- Partner with CWB program faculty and administration for curriculum support, scheduling, and reporting
- Successes: Coaching consistently received high marks on evaluations and was often one of the many highlights of integrating a leader's experience with Mason Leadership Programs.
- Challenges: In the early days of Mason Leadership programs, open-enrolment programs were offered which tended to be difficult to fill. As relationships were built and client organization programs began, the coaching continued to support the learning and a rhythm was created.

Coaching Vendor References:

Name: Melissa Schreiberstein, M.S., ACC

Organization: The Leadership Project, LLC (leadershipprojectcoach.com)

Title: Leadership Coach

Phone #: 202-441-4611

Email: melissa@leadershipprojectcoach.com

Length of service for coaching vendor work: 3 years

Notes: This reference can speak to the work providing coach vendor services for George Mason University, Center for the Advancement of Well-Being, Leading to Well-Being programs between 2019-2022.

Name: Gregory H. Sims

Organization: Continual Learning and Leadership Branch, Training Operations Division, Training and Development, Transportation Security Administration

Title: Program Manager Rising Leaders Development Program (RLDP)

Phone #: 202-657-3656 (Mobile) 571-227-3340 (Office)

Email: Gregory.Sims@tsa.dhs.gov

Length of service for coaching vendor work: Since the Launch of RLDP in 2016

Name: Scott Montgomery, ACC

Organization: Worldgate LLC

Title: Chief Customer Officer

Phone #: 703-283-4524

Email: smontgomery@worldgatellc.com

Length of service for coaching vendor work: 2 years

Notes: This reference can speak to work providing coaching vendor services into the School District of Philadelphia.

XIII(B)(4)(a)	Specific Plan (Methodology): Explain your specific plans for providing the proposed services outlined in the Statement of Needs, specifically your approach to providing the services described herein.
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The Washington Coaching Group in serving in the role of Coaching Vendor is always striving to be collaborative, adaptive, creative, detailed, and responsive with the goal of maximizing each client's performance through the following approach:

- Enhance and support participants' integration of knowledge, skills, and self-awareness gained through their experiences with their work or program;
- Work collaboratively to meet the shifting needs that may arise with George Mason University and the participant group;
- Provide the most cutting-edge leadership coaching services available to challenge high potential clients to expand their thinking; and
- Commit to new actions aimed at achieving goals in support of their change initiative, personal and professional effectiveness, and organizational well-being.

XIII(B)(4)(b)	Specific Plan (Methodology): Explain your specific plans for providing the proposed services outlined in the Statement of Needs, specifically what, when and how services will be performed.
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Washington Coaching Group strives always to be collaborative, adaptive, creative, detailed, and responsive. We adapt our coaching plan to meet the needs of the participant organization. For the Mason programs, clients typically will have anywhere from 1-3 sessions. These sessions are conducted by phone and initiated by the participant from a comfortable, quiet location. The sessions are generally scheduled in advance through Blackboard or in person sign-ups on location.

RATES, INQUIRIES, AND PAYMENT TERMS

XIII(B)(5)(a)(i)	<p>Fixed program rate to include:</p> <ul style="list-style-type: none"> - Attend each module - Conduct instructor debriefs after each module - Monitor and support mentor coaches - Support and mentor students - Review and evaluate final recordings, flagged by mentor coaches - Mentor coaching students who do not pass their first recording -Total Level of Effort = 25 days
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Proposed Director of Coaching Education Pricing for Ellen Fulton, MCC for the Leadership Coaching for Organizational Well-Being program is \$25,000 per virtual cohort. Travel costs would need to be reimbursed for in-person deliveries. Additional duties performed:

- Pre-module meetings with Faculty
- Track and report attendance and coaching observations

- Coordinate missed class and assignment make-up
- Coordinate and manage technical logistics of virtual learning sessions
- Liaison to the ICF for credentialling
- ICF credentialling administration support
- Continual design support and development support of curriculum
- Attend Open-houses for interested participants
- Meet with interested participants
- ICF Chapter Partner to include presentations, coffee hour discussions
- Represent GMU Coaching at Local and Global Conferences

Proposed Director of Coaching Education Pricing for Ellen Fulton, MCC for the Masterful Coaching Course is \$20,000 to include:

- Attend 16 classes
- Co-instruct learning and awareness
- Meet individually with participants for mentor coaching
- Complete on-going coaching evaluations
- Provide written feedback to participants on a recording
- Monitor and review blackboard
- Track and report attendance and coaching observations
- Coordinate missed class and assignment make-up
- Support overall program administration
- Coordinate and manage technical logistics of virtual learning sessions
- Liaison to the ICF for credentialling
- ICF credentialling administration support
- Continual design and development of curriculum
- Attend Open-houses for interested participants
- ICF Chapter Partner to include presentations, coffee hour discussions
- Development of a coaching video library with GMU branding

**The proposed pricing for the Director of Coaching Education for the Masterful Coaching Course does not include payment for the Co-Instructor role which is critical for this level of training. If the Washington Coaching Group is to supply the Co-Instructor for this program, that would be an additional cost of \$12,000. If the program increases in size to 14 or 15 participants, the program must also include an additional MCC Mentor Coach. If the Washington Coaching Group is to supply the additional MCC Mentor Coach, that would be an additional \$7,000.

XIII(B)(5)(a)(ii)	Coaching Vendor Administration for Executive Education Programs <ul style="list-style-type: none"> • Hourly rate
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The sample proposed coaching budget for coaching vendor administration for Executive Education programs show less than a 17% increase in costs from the previous contracted rate. This rate represents the first increase in rates in more than 13 years of service with George Mason University. Additionally, as the popularity of MCC only coaching contracts increase, the costs associates must also be considered. The proposed MCC only coaching budget represents a below market rate for this type of service. Typical MCC rates average between \$550-\$700 per hour.

Sample Proposed Coaching Budget with ICF Credentialled coaches	\$37,650
\$350/hour/coach for 100 total coaching participants (1 coaching sessions/participant) 100 hours total	\$35,000
Administrative Fee	\$2,300
A one-hour overview of coaching to participants/introduction of coaches	\$350
Sample Proposed Coaching Budget with MCC only Coaches	\$47,650
\$450/hour/coach for 100 total coaching participants (1 coaching sessions/participant) 100 hours total	\$45,000
Administrative Fee	\$2,300
A one-hour overview of coaching to participants/introduction of coaches	\$350

XIII(B)(6)(a)	Are you and/or your subcontractor currently involved in litigation with any party?
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No.

XIII(B)(6)(b)	Please list any investigation or action from any state, local, federal or other regulatory body (OSHA, IRS, DOL, etc.) related to your firm or any subcontractor in the last three years.
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Not applicable.

XIII(B)(6)(c)	Please list all lawsuits that involved your firm or any subcontractor in the last three years.
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Not applicable.

XIII(B)(6)(d)	In the past ten (10) years has your firm's name changed? If so please provide a reason for the change.
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Not applicable.

XVI	<p>Payment Terms</p> <p><input type="checkbox"/> Option #1- Payment to be mailed in 10 days-Mason will make payment to the vendor under 2%/10 Net 30 payment terms. Invoices should be submitted via email to the designated Accounts Payable email address which is acctpay@gmu.edu.</p> <p>The 10-day payment period begins the first business day after receipt of proper invoice or receipt of goods, whichever occurs last. A paper check will be mailed on or before the 10th day.</p> <p><input type="checkbox"/> Option #2- To be paid in 20 days. The vendor may opt to be paid through our Virtual Payables credit card program. The vendor shall submit an invoice and will be paid via credit card on the 20th day from receipt of a valid invoice. The vendor will incur standard credit card interchange fees through their processor. All invoices should be sent to:</p> <p>George Mason University Accounts Payable Department 4400 University Drive, Mailstop 3C1 Fairfax, VA 22030 Voice: 703.993.2580 Fax: 703.993.2589 e-mail: AcctPay@gmu.edu</p> <p><input checked="" type="checkbox"/> Option#3- Net 30 Payment Terms. Vendor will enroll in Paymode-X where all payments will be made electronically to the vendor's bank account. For additional information or to sign up for electronic payments, go to http://www.paymode.com/gmu. There is no charge to the vendor for enrolling in this service.</p>
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Washington Coaching Group would select Option#3- Net 30 Payment Terms.

**ADDITIONAL MATERIALS: SECTION XIII(B)(3)(b) RESUMES
OF WASHINGTON COACHING GROUP TEAM
FOLLOWING THIS PAGE**



Washington Coaching Group

Ellen Fulton (M.S.ED., MCC) – Executive and Leadership Coach

“The door to leadership opens inward.” ~ Ellen Fulton

Ellen Fulton’s mission is to elevate the conversations leaders are having in the world, build a more robust perspective, and equip organizations to take actions to maximize their strategic goals. She challenges clients to do their own inner work with the understanding that a leader’s success is directly proportional to their self-awareness. Aligning strengths, clarifying values, and building the embodiment of effective communications are key underlining themes that prevail in coaching leaders to visionary results.

Key Accomplishments

- As a Master Certified Coach deeply ingrained in the global coaching community, Ellen brings her network, knowledge of leadership, and experience to the to her robust client base. She has worked with thousands of individuals and teams across all levels of leadership to include SES, C-Suite, mid-level managers, and individual contributors throughout the federal government, corporations, small businesses, non-profits, and education.
 - Ellen has worked extensively into many sectors of the government delivering coaching and coaching program oversight. For her involvement on a high-performing team coaching within the intelligence community, she was a recipient of the prestigious Prism Award given by the International Coach Federation celebrating excellence and business achievement through coaching within a government agency in 2010.
 - Within the Transportation Security Administration, Ellen has personally coached hundreds of leaders from TSOs to Assistant Administrators and other SES leaders. Additionally, she has over 10 years of experience coordinating and leading teams of coaches for the participants of the TSA Rising Leader Development Programs and the Mid-Level Development Programs run with George Mason University.
-

Professional History

Executive Leadership Coach and Founding Partner, The Washington Coaching Group, 2008- Present
Mason Institute for Leadership Excellence/Center for the Advancement of Well-Being 2009-Present
MCC Director of Training, Leadership Coaching for Organizational Well-Being, GMU 2015-Present
Faculty, The Center For Coach Development, 2020- Present
Faculty, Leaders Alive, 2021- Present
MCC Director of Training, MCC Course Practicum, GMU 2022-Present
Co-Director, Advanced Coaching Program for Leadership & Organizational Well-Being, 2011-2015

Education

Georgetown University – Leadership Coaching Certificate, 2008
Old Dominion University – Master of Science in Education – MSED in Guidance and Counseling, 1992
Old Dominion University – Bachelor of Science – BS in Human Services Counseling, 1989

Certifications

Master Certified Coach (MCC) by the
International Coach Federation, Certified
Mentor Coach by inviteCHANGE, Polarity
Partners PACT certified

Certified in Voices 360, Leadership Circle
Profile, viaEDGE, and DISC
Commonly used: Strengthsfinder, VIA
Character Strengths, MBTI, other 360’s



Eric Woodard (Ed.D, PCC) - High Performance Career Coach

The mission: knock down stories that are holding you back. The opportunity to reach higher levels of aliveness, impact, and connection by breaking through limiting beliefs is available to everyone. It's available to you.

For the last 25+ years Eric has helped hundreds break through barriers in work and life around Presidents and Princes, Senators and Scientists, Deans and Diplomats, CEOs and Consultants. He has travelled or worked in over 70 countries, completed 9 marathons and is the author of 4 books including *Your Last Day of School* and *The Ultimate Guide to Internships*. Eric lives in Alexandria, VA with his amazing wife Keri and their 4 fantastic kids.

Key Accomplishments

- Across a full spectrum of disciplines Eric has helped individuals, teams, and organizations knock down barriers to elevate performance at all levels of government, business, non-profits, higher education, cultural organizations, international civil society, and more.
- Eric has deep expertise and experience coaching individuals and groups on a range of topics including resilience, productivity, inclusion, balance, trust, communication, focus, clarity, energy, courage, influence, caregiving, intuition, career growth, spirituality, presence, physiology, relationships, stress, belief, vulnerability, confidence, purpose, integrity, power, and more.
- At both the individual and organizational level, Eric's trauma-informed coaching is buoyed by fluency in all major theories of culture, change, learning, and leadership. Driven by positivity, authenticity, humor, and storytelling, Eric's coaching leverages the power of context, emotions, values, and the unconscious mind. His coaching also relies on distinctions of agreement vs expectation, you vs them, style vs substance, depth vs breadth, serving vs pleasing, owner vs victim, empathy vs assertion, showing vs telling, commitment vs intention, professional vs social, and responsibility vs control.

Professional History

[Win At Work](#) (Washington, DC and Virtual): High Performance Career Coach, Founder/CEO (2021-Present)
[Smithsonian Institution](#) (Washington, DC): Director of Fellowships and Internships (2012-2021)
[U.S. Department of State](#) (Washington, DC): Special Asst to the Secretary and UNESCO (2009-2012)
[U.S. Senate](#) (Washington, DC): Special Asst and Scheduler to Senator Hillary Rodham Clinton (2001-2008)
[The White House](#) (Washington, DC): Intern (1997), Office Manager to the First Lady (1998-2001)
[The Voice of America](#) (Washington, DC): Researcher – East Asia Pacific Division (1997)
[Rainbow Diving](#) (Guam): Scuba Instructor (1994-1997)

Education

[George Washington University](#) (Washington, DC) – Ed.D. Human and Organizational Learning (2018)
[George Washington University](#) (Washington, DC) – M.A. International Affairs (2000)
[University of Missouri](#) (Columbia, MO) – B.A. Biology (1995) *Cum Laude, Phi Beta Kappa*
[International School of Bangkok](#) (Bangkok, Thailand) – H.S. Diploma (1991)

Certifications

[International Coaching Federation](#); ICF (Lexington, KY) Professional Certified Coach (PCC; 2021)
[BetterUp](#) (San Francisco, CA) – Group Coach (2021), Distinguished Fellow Coach (2021)
[High Performance Institute](#) (Portland, OR) – Certified High Performance Coach (CHPC; 2020)
[American University](#) (Washington, DC) – Leadership Coaching for Organizational Performance (2020)
[Professional Association of Diving Instructors](#); PADI (Los Angeles, CA) – IDC Staff Scuba Instructor (1996)



Washington Coaching Group



Sarah Happel (MCC) – President & Founder, Board Chair and Member

A graduate from Kansas State University, Sarah leads a top leadership consultant and executive coaching organization located in the United States. Formerly an international athlete, Spectrum's mission is to maximize the team performance and well-being of 100,00 teams by 2025. **She works with global organizations driven to improve their communication, productivity, and corporate culture - one powerful conversation at a time.**

Connections

Sarah's personal sphere of influence spans many industries with direct connections to C-Suite executives, and global development organizations. Within the Federal Government, she has extensive experience coaching leaders at all levels within TSA, Army, CIA, DoD, NSF, and the VA. She has extensive experiences leading complex, multicultural volunteer associations with diverse locations and needs. Sarah has spent 15 years living and working in German, Spanish, Italian, and Finnish.

Board Positioning & Influence

Sarah is an excellent fit for boards seeking strategic visioning and direction setting, relationship building, global awareness and significant business experience.

Key Business Transactional Experience

- **Co-creator of the successful SOAR Leadership & Coaching Program**, which has certified over 200 executive coaches and HR professionals worldwide. With a focus on self-management and alignment of strengths, experienced leaders learn how to transform workplace environments for greater organizational impact. **Sarah supports global leaders in solving complex problems** and advancing their teams with a new sense of commitment, energy and purpose.
 - **Facilitate & teach engaging & results-driven leadership development programs** regarding best practices for developing leaders across all sectors, bridging communication gaps, and building leadership core strengths. Clients include Marriott International, PwC, IMF, IDB, VW, The World Bank Group, Purdue, Johns Hopkins, Touchstone Energy, DoD, DHS, NSF, TSA, and several professional associations.
 - **Founding team member, developing, teaching and creating a strategic vision for George Mason's acclaimed Leadership Coaching Program in Organizational Well-Being.** This included **working closely with the ICF regarding certification**, and continual collaborating on several ICF fronts: Assessor Marker Training for faculty development, maintaining close relations with ICF local chapters for alumni relations, and partnering with the ICF Metro DC Chapter's regular events to promote thought leadership. People, profits and productivity are intertwined in this approach.
 - **Developed Global Mobility Departments throughout the EU**, (Frankfurt, Luxembourg, Madrid, Brussels) including curriculum, ethics guidelines, and train-the-trainer programs. Presented 1-3 day workshops for employees of all levels in the areas of cross-cultural and international communication for large global companies. Designed individual & group programs to create, encourage and reinforce cultural understanding for employee retention and business development. Scope also included advising business units in each country on leadership best practices in complex organizations.
-



Washington Coaching Group

Additional Professional History

Faculty Member, Federal Executive Institute (2012-2014)

Adjunct Faculty, Department of Communications, Lasell College, Boston, 2010-201

Strategic Leadership & Intercultural Consultant, PricewaterhouseCoopers, EU countries, 2002-2010

Journalist - Christian Science Monitor, 1998-2000

Board & Committee Profile

ICF DC Metro Chapter, Capital Coaches Conference, Program Committee Member

Washington, DC (2020-2021)

- Collaborated with ICF DC Metro Board President Jim Simms and Capital Coaches Conference Committee Chair, Renee Bostick and her team to brainstorm, identify and interview top thought leaders in our field. This team of eight manages the entire process - months in advance of the conference - to assess and choose top coaches to serve as speakers to lead workshops, breakouts and keynotes at this highly regarded annual conference.

Executive Chair & Board Member, Washington Women's Leadership Initiative (WWLI)

Washington, DC (2016-2019)

- Led and advise 16-member board and over 200 members, 15 corporate sponsors and 1,000 guests committed to improving the advancement of women, and minorities in corporate leadership roles. Oversaw governance, finances and legalities while working closely with third-party vendors, staff and volunteers to serve a diverse and quickly growing membership.

Executive Chair & Board Member, International Monetary Fund Family Association

Washington, DC (2009-2012)

- Led and advised 12-member board, 30 committee chairs and 800 international members. Oversaw services for over 100 professional events for members, staff and upper management of the IMF. Managed extremely complex volunteer system while collaborating with Madame Lagarde, Ethics, Legal, HR, IT, and the Staff Association on critical topics to IMF and their families. **Spearheaded award-winning career coaching program for international spouses in transition via the ICF DC Metro Chapter.**

ICF DC Metro Chapter, University Partnerships Chair 2012-2013

Washington, DC (2011-2013)

- Collaborated closely with ICF DC Metro board president Barbara Smith and her board's vision of growing coaching awareness for individuals and organizations about the industry. Worked with leading University Coach-Certification Programs including Georgetown, George Mason and the University of Maryland to develop a strategic plan to spearhead a coaching consortium along the East Coast. The vision included 1) increasing professional development opportunities for 700+ local ICF local members through each University's expertise, 2) brainstorming and developing short-and long-term strategies to recruit and maintain volunteers, and, 3) growing overall exposure to organizations regarding the coaching field.

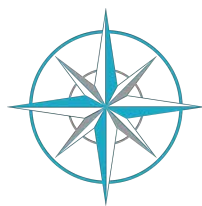
National Association of Corporate Directors Member (NACD)

Fullbright Alumni Association Member

Kansas State Alumni Association, Member

Perham High School Hall of Fame, Member and Sponsor

European School, Frankfurt, Germany, Parent Committee Lead (2008-2010)



Washington Coaching Group

Education

- **Master of Science & Bachelor of Arts**, Mass Communications, Kansas State University, Manhattan, KS
 - **Graduate research focused on international communication**, Universidad del Salvador, Argentina.
 - **Fulbright Grant** awarded for research on cross-cultural credibility of international war correspondents at the University of Helsinki, Finland.
-



Washington Coaching Group

JENNIFER STARR, BA, MCC GENERATIVE WHOLENESS PRACTITIONER



Jennifer offers her clients her gift of intuitive and creative insight to expand perspective and create new possibilities, inspiring the full expression of their unique genius and highest contribution. She assists in bridging the gaps between known professional success and the often-unknown personal fulfillment. She works with individuals and leaders who are dedicated to evolving their best selves and making a significant and positive impact in the world.

Location
Bend, OR USA

Industry Specialties

- Life Sciences
- Expressive Arts
- Healthcare
- Professional Development
- Leadership
- Sales/Marketing
- World Travel
- Communications

Areas of Expertise

- Authentic Presence
- Vision/Mission/Legacy
- Professional Branding
- Life/Career Transition
- Whole Life Balance
- Creative Expression
- Leadership development
- Motivation/Engagement
- Entrepreneurial Pathways
- Spiritual Development
- Project Management

Client Partners

- The Boeing Company
- Ray of Hope Foundation
- Healthgrades®
- Intermountain Health
- T-Mobile
- Powers of Automation

EXPERIENCE

As a Master Certified Coach, Jennifer facilitates individuals, partnerships and teams in achieving inner and outer success through authentic leadership. Her passion is to inspire and encourage life/work congruence and personal sovereignty, i.e. taking a stand for who we are at our personal best. She coaches those who are already effective at making things happen and achieving results, and yet are acutely aware that there is something more.

Jennifer is an entrepreneur and leader with over thirty years of service in a wide range of professional arenas, including world travel and direct sales/marketing. She has started up companies, both brick/mortar and virtual, and has successfully led teams and organizations.

EDUCATION/CREDENTIALS

Jennifer holds a BA in Art and Psychology from University of Oregon. She is an International Coach Federation Master Certified Coach with 3000+ hours of experience, a Certified Coach Mentor and Course Leader with inviteCHANGE®. She holds supplementary certifications in Tilt 365, Core Values Index®, Expressive Arts Therapy®, Psych-K® (Psychological Kinesiology), SoulCollage®, Voice Dialogue, and other modalities that support holistic living and authentic leadership.

SUCCESS STORIES

- Staff physician at a VA Hospital and Executive Director of an international non-profit, restructured her position to allow for more life balance and to launch another dream. In clarifying her vision and aligning with her values, she is in the beginning phases of starting up an alternative, creative solution-based, holistic health and wellness center.
- Physician Leader: "Right on my two year schedule, I retired from the operating room, began as a medical co-director for Hospice, and was granted privileges for palliative medicine at Wilcox Hospital. In the years I've worked with Jennifer, I've made two major career evolutions, two major relationship changes, and two enormous geographic changes. I'm living the best life I've ever had– it's all different, it all works, and is a manifestation of ideas I began to articulate with Jennifer years ago.
- University IT Manager sought more personal fulfillment and motivation. Our work included visioning, planning & implementation, resulting in freedom from debt, improved relationships, creating a flexible, virtual position within his organization, building a stronger team, becoming a certified wellness coach, and traveling and living in places that he'd always dreamed of.
- Freelance writer: "There has been a tectonic-caliber shift in my life since I began working with Jennifer. She helped me see new approaches and inroads for myself in the world. With her help, I've felt my self-imposed pressure and expectations dissipate, experiencing confidence that always existed, but was in the shadow of emotions that had hindered me.



Washington Coaching Group

DR. FELIX C. VILLANUEVA, MCC

10416 120th Avenue Ct NW
Gig Harbor, WA 98329

(626) 275-8755
drfelix@discoverwonderment.com

PROFILE

Executive and Organizational Coach, specializing in leadership development, conflict management, and organizational change. Highly trusted and regarded by peers, bringing the utmost professionalism to every client interaction. Passionate about improving the performance level of leaders and managers, and developing healthy interactions among members of the organization.

AREAS OF SPECIALTY

- Executive Coaching
- Individual and Group Coaching
- Mentor Coaching
- Conflict Management
- Interpersonal Relationships
- Life Coaching
- Crisis Intervention
- Client Confidentiality

PROFESSIONAL EXPERIENCE

Founder / President – Gig Harbor, WA 2019 - Present

- Founded Path2Success Coaching and Consulting, LLC.
- Provided over 3,000 executive coaching hours to leaders in Fortune 500 companies and the US Federal Government in locations around the globe.
- Provided training and mentoring to prospective coaches seeking certification through the International Coaching Federation (ICF)

Chief Executive Officer - Altadena, CA 2010 - 2021

Strong organizational management and leadership experience as the leader of 140 satellite organizations in a diverse and multicultural religious, non-profit organization. Efficient, productive and resourceful. A visionary and outside-the-box innovator.

- Led in the implementation of a new board of directors model focused on mission and service to the member organizations.
- Implemented Outside-the-box support and programming to member organizations during the COVID-19 pandemic resulting in lessening financial impact and increasing participation.
- Implemented financial and budgetary process which moved organization from a \$1.5 MM annual deficit to 3 MM annual surplus in a period of 6 years.

Senior Minister - San Diego, CA 2005-2010

Managed and mentored staff of four full- and part-time employees with a budget of over \$2MM in personnel, programs, and facilities.

- Developed an effective 5-year strategic vision plan which yielded budgetary growth of 15% annually.
- Implemented an aggressive publicity, internet and marketing program, staffed by volunteers which resulted in public name recognition and growth in church membership by 56% over a period of five years

Hospice Chaplain - San Diego, CA

2003-2005

Provided end-of-life care to over 200 hospice patients. Recognized for ability to care for patients and families in the dying process in various interfaith contexts.

- Provided crisis management to families in crisis due to the death or terminal illness of a loved one.
- Member of multi-disciplinary hospice team which included: physicians, RNs, LVN,

Senior U.S. Navy Officer (Chaplain Corps) - Various Locations Around the World

1982-2003

Achieved 100% personnel goals during time of personnel shortages.

- Combat Veteran: Operation Iraqi Freedom
- Responsible for the implementation of effective annual training plan, resulting in zero casualties or injuries during war operations.
- Developed training and strategic planning for over 100,000 military personnel and their families in the US and overseas.
- Developed and led first-of-its-kind Team Building workshop. Trained over 100 volunteer force to act as facilitators for program reaching over 100,000 military personnel and their families.

LICENSING, MEMBERSHIPS, AND TRAINING

Coaching Certifications:

- | | | |
|--|---|---|
| <ul style="list-style-type: none"> • Master Certified Coach (MCC), International Coaching Federation • Harrison Assessments Employee Development Facilitator | <ul style="list-style-type: none"> • Professional Coaching Certification (PCC) Assessor • DISC Assessment Facilitator | <ul style="list-style-type: none"> • Conscious Business Coaching at BetterUp • Mediation Skills / Conflict Resolution |
|--|---|---|

EDUCATION

Argosy University
Ed.D. Organizational Leadership, 2015

Evangelical Seminary of Puerto Rico
M.Div., 1980

Princeton Theological Seminary
Th.M. Counseling, 1990

University of Puerto Rico
B.S. Biology, 19



ANNETTE S. HURLEY, M.A., HRD, MCC, BCC, NBC-HWC

4211 Ridge Top Rd, #1412 ~ Fairfax, VA 22030

Mobile Office: (703) 585-4021

Email: CoachAnnette@cox.net

CAREER TARGET: Empower individuals, teams, and organizations to cultivate leader potential and legacy through continuous development and learning for increased life and business performance.

CAREER SUMMARY: More than twenty-five years' experience working in the areas of *strategic change consulting; executive coaching; leadership development and learning; team and organizational development; change and career transition management; and assessment and feedback*. Powerful change champion and catalyst for integrating and cascading the service offerings of these business areas. Collaborated, influenced, advocated and led multiple business initiatives within diverse organizational cultures including the *federal government; corporate; military; academic; and non-profit* organizations.

EDUCATION/CERTIFICATONS/MEMBERSHIPS

- ✓ MA, Human Resource Development, Marymount University, Arlington, VA
- ✓ BSW, Social Work/Communications, Western Michigan University, Kalamazoo, MI
- ✓ Training Specialist Certificate Program, Georgetown University, Washington, DC
- ✓ Master Certified Coach (MCC), member, International Coach Federation - (2007 – Current)
- ✓ Professional Certified Coach (PCC), member, International Coach Federation - (1998 - 2007)
- ✓ Certified Professional Coach (CPC), Academy for Coach Training (ACT) - (1998-2007)
- ✓ Board Certified Coach, Center for Credentialing and Education – (2012 – Current)
- ✓ National Board Certified - Health & Wellness Coach – NBC-HWC – (2018 – Current)
- ✓ Assessment and Feedback Specialist in both individual and 360 assessments

SELECTED CAREER CONSULTING HIGHLIGHTS

- **EXECUTIVE, LEADERSHIP & CAREER COACHING...**More than twenty-five years' experience as an executive, leadership and career transition coach providing a suite of coaching and career development services, including 1-to-1 executive coaching; team/group coaching; 360 assessments and feedback; action learning; and coach awareness and skills training. Coached more than 600 C-Suite leaders; federal executives, senior and aspiring leaders. Clients represent diverse global management consulting firms; federal agencies; private sector businesses; non-profits; and ICF-accredited coach training schools. Works with multiple generations and diverse client professions. Adept at addressing the whole-person, clients often choose to engage with a variety of assessment tools to deepen understanding of self and others' leadership preferences, behaviors, motivators and social styles. Lead architect in creating and building capacity for and providing legacy leadership for agency's Executive Coaching Program. Worked collaboratively to formalize the program, building and expanding capabilities while leveraging coaching and client capacity by 150% within a 4-year period. Partnered with an external vendor to build a 15-person coach cadre and then provided 1-to-1 executive and team coaching as well as legacy leadership and oversight. Coaching clients were drawn from the top 135 senior executives and seasoned and aspiring leaders and managers.

- **CHANGE AND CAREER TRANSITION MANAGEMENT**...Key Career Transition Project Director and lead Career Coach for corporate management team (Right Management/Resource Consultants, Inc (now dba as Serco) that oversaw the operation of 55 worldwide Career Transition Centers that provided transition services to 450,000 military and civilian members over a seven-year period. Provided one-to-one and group career transition and development services stateside and in Germany in the areas of: *assessment, portfolio development; communication and marketing strategies; interviewing; networking; and negotiations*. Led more than 25 career counselors at seven sites. Expanded career transition business from military to federal sector leading a \$1M contract to provide services to USDA/Forest Service.
- **LEADERSHIP DEVELOPMENT AND LEARNING**... Key member of 10-person team charged with creating start-up customized holistic corporate leadership program. Team expanded to 40 as a result of strategy design and implementation success. Program cascaded across multiple leader levels including executive, senior leader, aspiring leader and manager. Agency's director championed program vision and fueled with more than \$5M in initial start-up capital resulting in the building of a tangible leadership culture over a five-year period. Facilitated leadership, change and coaching workshops and served as frequent guest speaker for programs varying in length from 1 day to 2 weeks over eight-year period.
- **ORGANIZATIONAL DEVELOPMENT**...Provided strategic direction and innovative thought leadership for the launching of an Organizational Development Consulting practice for a large-scale organization funded at \$9.5M. Key member of a 15-person consultant team who supported executive and senior level leaders in multiple business directorates. Consulted with key start-up leaders to develop the business mission, strategic vision, core beliefs, guiding principles and client service offerings. Provided consulting and facilitation to senior leaders on organizational effectiveness strategies, the implementation of change initiatives, approaches to team development, strategic planning and visioning, and 360 assessment and feedback.

PROFESSIONAL CAREER HISTORY

Coaches for Change, LLC, Alexandria, VA Founder and Chief Change Officer Master Certified Coach, Mentor Coach, Facilitator, Trainer, Strategic Consultant and Speaker	<i>08 – Present</i>
National Geospatial-Intelligence Agency (NGA), Bethesda, MD Executive Coaching Program Manager/Facilitator/Consultant Organization Development and Leadership Consulting (HDSL) Division	<i>06 – 08</i>
Booz Allen Hamilton, McLean, VA Executive Coaching Program Manager/Change Management and Leadership Facilitator/Consultant	<i>98 – 06</i>
Coaches for Change, Alexandria, VA Founder and Chief Change Officer Professional Certified Coach, Facilitator, Trainer and Human Resource Consultant	<i>97 – 98</i>
Resource Consultants, Inc (Serco)/Right Management, Germany and Vienna, VA Career Transition Center - Project Director, Center Manager and Career Counselor ACAP - (Army, Navy, Air Force, Department of Agriculture, Forest Service)	<i>91 – 97</i>

CHELESE PERRY, PCC



Washington Coaching Group

chelese@cheleseperryllc.com



703.825.0308



Washington, D.C. Metro Area



linkedin.com/in/cheleseperry/



EXPERTISE

C-Suite Coaching Partnerships
Leadership Development within
Adverse Environments
Leadership Style Assessments
Developing Effective Leaders
Strategic Communication
Multi-Cultural Awareness &
Sensitivity
BIPOC Leadership Strategies
Women in Leadership
Virtual Leadership
Organizational Development
Authentic Relationship Building
Talent Engagement and Retention
Accountability Structures
Remediating Self-Limiting Beliefs
Overcoming Imposter Syndrome
Overcoming Obstacles
Values Alignment
Mindfulness Practices for Leaders
Guidance in Diversity & Inclusion

INDUSTRY CERTIFICATIONS

Professional Certified Coach (PCC),
International Coaching Federation
Certified DiSC® Facilitator & Issuer
Leadership Coaching for
Organizational Well-Being,
George Mason University
Certified, Group Coaching

EXECUTIVE SUMMARY

As a facilitator of optimal growth, provide verifiable expertise engaging leaders and professionals in unearthing capabilities unknown while reinforcing and strategizing the use of their greatest strengths. Esteemed as a disarming, refreshing, and mission-focused Professional Certified Coach (PCC), thrive and succeed in strengthening leadership competencies, navigating role transitions, improving communication, increasing emotional intelligence, and enabling performance excellence. Seek to serve as a certified and trusted partner to private and/or public sector entities – ensuring attainable success and genuine, solutions-oriented growth.

PROFESSIONAL EXPERIENCE

CERTIFIED EXECUTIVE / LIFE COACH, Chelese Perry LLC, 2017 – Present

Selected by private and public sector organizations to coach, design, and deliver leadership programs for Senior Executive Service (SES) members, C-Suite management, supervisors, and high potentials as a distinguished and certified Executive & Life Coach. Conduct thorough, illuminating workshops reinforced by both proven and pioneering leadership and organizational development research. Maintain a passion for exceptional customer service and pragmatic goal attainment, with earned reputation as an instinctive and trustworthy coaching partner.
<https://cheleseperryllc.com/>

- Increase productivity by engaging goal setting and accountability tools, aligning employees with their strengths, and focusing on employee retention and engagement.
- Introduce tools to better handle conflict and difficult conversations, work life balance, effective communication, and strategies to manage up.
- Coach clients in developing well-being practices to better manage executive stress, encompassing meditation, movement, and boundary setting.
- Conduct thorough MBTI, FIRO B, CliftonStrengths, and EQ-i 2.0 assessments, surveys, and interviews to reveal business, group, and individual needs.
- Collaborate with executives, program managers, and stakeholders to build and maintain positive relationships, confidence, and buy-in necessary to drive successful results.
- Support and advise a broad base of clients, ranging from private and non-profit sector organizations to federal agencies including U.S. Department of Justice (DOJ), U.S. Office of Personnel Management (OPM), Department of Defense (DOD), Customs and Border Protection (CBP), Freddie Mac, Delta, GEICO, Norfolk Southern, Comcast, Mount Sinai Health System, Georgia State University, PCORI, and The Annie E. Casey Foundation.

– Current Engagements –

- **Contract Executive Coach, Watering Seeds Foundation (12/2021 – Present):** Executive Coach for Watering Seeds, a not-for-profit workforce readiness and social justice program, providing professional development and executive-quality coaching services to first generation college students and diverse, untapped, and underestimated young adults.
- **Chief, Core Guide (11/2021 – Present):** Support members primarily through the peer group service, Core. Core Groups drive powerful personal transformation through a group-based experience to unpack challenges, foster deep connections, and accelerate members' leadership capacity. Provide a confidential, supportive space to brainstorm, problem-solve, strategize, and recharge in the company of trusted equals.

CHELESE PERRY, PCC

EXECUTIVE LIFE COACH & LEADERSHIP CONSULTANT

PROFESSIONAL DEVELOPMENT

Intensive coursework and industry certifications include:

Positive Intelligence
Miller Heiman Group – Professional Account Management Certification, Conceptual Selling, Strategic Selling
Communicate to Improve Sales Results, Speakeasy Inc.
Certified Reiki Master

EDUCATION

B.S., Business Administration
Florida A&M University
School of Business and Industry

AFFILIATIONS

International Coach Federation
Forbes Coaches Council

EARLIER EXPERIENCE

SALES EXECUTIVE, Abbott Laboratories, 1988 – 1994

Specialized in diagnostic medical technology consulting to major medical centers, correctional facilities, and clinics. Managed multi-million dollar portfolio of clients, exuding customer service excellence and consultative sales strategy.

Additional Contributions, Select Projects & Achievements

- Demonstrated a proven track record of aligning initiatives to exceed clients' key ROI.
- Deployed persuasive, needs-assessment aptitude and diligence in the creation and maintenance of key stakeholder relationships among premier client group.
- Earned Abbott Diagnostics 100% Club member each year.

EXPERIENCE *continued*

Certified Executive | Life Coach, Chelese Perry LLC Projects Continued:

- **Contract Executive Coach | Mentor, CoachDiversity Institute (01/2021 – Present):** Coach leaders and executives on raising personal awareness and knowledge of diversity relative to inclusive leadership and organizational culture.
- **Contract Executive Coach, LEADZus (01/2019 – Present):** Coach executive and senior leaders for a financial services client.

COMMUNITY & EDUCATION ADVISOR, 2006 – 2017

Vital efforts include having led, guided, and significantly contributed to educational initiatives, school program development, introduction of STEAM curricula, and grant securement for critical education needs. Honored with Volunteer of the Year 2012 – 2013, on account of notable contributions to school improvement, innovative student and program development, and community-driven advancements.

Additional Contributions, Select Projects & Achievements

- Served as Chair, School Improvement Parent Committee; partnered with administrators and instructors to further identify, engage, and embrace the underserved communities.
 - Gathered SOL data illustrating performance gaps among historically underserved students; subsequently developed and gained leadership approval to launch unique programs which helped to address these gaps.
- Developed and led after-school programs to introduce girls to STEAM (Science, Technology, Engineering, Arts, and Math).
 - Participants successfully pursued and graduated with university STEAM degrees.
- Served as PTA Vice President with leadership to approve grants and ensure accountability and focus among executive board.
- Secured a grant leading to the development of a math lab which allowed for additional support for children in need of advanced math assistance.
 - Hired a dedicated math lead and staffed a dedicated math lab with 50+ parent volunteers to support this effort.
- Served as Chair of Staff Appreciation; along with a team of parent volunteers, led the development of monthly well-being initiatives for staff members.

SENIOR NATIONAL ACCOUNT EXECUTIVE, Coca-Cola USA, 1994 – 2000

Progressed throughout the organization to guide a team of 10 cross-functional industry leaders in forging strategic partnerships with key global business partners. Designed and implemented tactical sales, marketing, and business development programs designed to utilize the power of the Coca-Cola brand, depth of business expertise, and consultation to partner with clients – ultimately growing their business and brand presence globally.

Additional Contributions, Select Projects & Achievements

- Developed lasting, key relationships with clients' senior leadership and franchise community that secured a seven-year, multi-million dollar contract.
 - Created competitive advantage and coaching to the client, employing strategies to effectively communicate corporate initiatives enterprise-wide.
- Mentored and coached female executives around inclusion, executive presence, managing up, and imposter syndrome.



Lyssa M. deHart, LICSW, MCC, BCC

Bainbridge Island, WA 98110

Phone: 206-900-2022 • E-Mail: Lyssadehart@gmail.com

www.LyssadeHart.com



Washington Coaching Group

Learning & Development – Coaching

Professional and executive coach leveraging 20+ years' counseling and coaching experience working with individuals and organizations. Years of experience in creating safe spaces for learning and development. A decade of experience working in Governmental Agencies. Individual, Organizational, and Team Coaching and training experience. Author of two books: *StoryJacking: Change Your Inner Dialogue Transform Your Life, the Reflective Coach*. And the creator of *Coaching with the Power of Metaphors Certification Program*.

Experience

Lyssa deHart, LLC

Aug 2004 - present

Professional & Executive Coach, Therapist, Consultant, Trainer, and Author

- Drive continuous improvement in relationships, healthy conflict styles, and synergy across groups and teams through ongoing coaching.
- Foster psychologically safe spaces for clients, promoting personal responsibility and self-management.
- Develop personalized programs in collaboration with clients to achieve sustainable change and support their goals.
- Apply extensive experience with Insights Discovery to enhance self-awareness, growth mindset, and emotional intelligence.
- Cultivate powerful communication, emotional intelligence, and influencing skills in leaders for a visible impact in their organizations.
- Employ systems thinking and collaboration to apply coaching practices and principles for efficient team cross-pollination.
- Utilize various individual and 360 assessments (Tilt365, EQi 2.0, Hogan) to identify individual and team strengths, styles, and growth opportunities.
- Increase confidence, trust, and emotional regulation through coaching, reducing negative and dysfunctional leadership styles for sustainable change.
- Support clients with deep listening and powerful inquiry to enhance self-awareness, emotional intelligence, and breakthroughs in problem areas.
- Author of "StoryJacking: Change Your Inner Dialog, Transform Your Life" (2017).
- Developed an interactive geocache training program to improve teamwork and cross-communication within organizations.

inviteCHANGE

May 2017 – present

Faculty, Adult Learning Educator, Executive Coach, Mentor Coach

- Delivered training and coaching for individuals and organizations, including Merrill Lynch, Boeing, and Microsoft.
- Modeled effective listening and communication skills to enhance learning experiences.
- Guided coaching students through Tilt365 exploration in collaboration with inviteCHANGE.
- Supported Microsoft's culture change initiative through coaching and training.
- Applied Tilt365 Assessment tool with mid and senior management clients for targeted development.

- Focused on change management skills to promote effective leadership, expand coaching culture, and elevate team performance.
- Led coach training for diverse international teams, emphasizing cultural competence, inclusion, and diversity appreciation.
- Collaborated with managers, supervisors, and leaders in High Touch Coaching program to foster culture change, improve engagement, and boost employee performance.
- Provided executive coaching for leaders across multiple industries, concentrating on confidence, executive presence, and emotional intelligence.

University of Phoenix

January 2002 – October 2007

Lead Faculty, Adult Learning Educator, Community Building

- Led the design and implementation of student orientation, enhancing educational goal completion as Lead Faculty.
- Established strategic alliances with external organizations to facilitate training and education for Human Services Program students.
- Fostered critical thinking and active communication by engaging students in a dynamic, interactive adult learning environment.
- Delivered courses in Human Services, covering topics such as Personality, Case Management, Psychological Theory, Human Development, and Advocacy and Mediation.
- Mentored undergraduate students to minimize dropouts and facilitate timely graduation.

United States Air Force

September 1998 – March 2005

Clinical Social Worker, Coach, Adult Learning Educator, Group Leader, Trainer, Speaker

- Conducted individual, group, crisis intervention, conflict mediation, and assessments for military personnel.
- Led and facilitated various group learning and skills practice sessions (5 groups, lasting 7 weeks or more) with less than 5% recidivism.
- Delivered engaging, large-scale presentations to inspire personal and professional growth.
- Created training programs incorporating role modeling, psychological safety, conflict management, and self-awareness.
- Designed and executed a successful, ongoing 7-year Anger Management Group based on cognitive-behavioral strategies, focusing on enhancing participants' thinking, insight, mindfulness, breathing practices, and interpersonal skills.
- Provided continuous, goal-oriented support for individuals to address family maltreatment issues, aggression, communication strategies, empathy, and confidence skill-building.
- Evaluated family maltreatment allegations and collaborated with a multidisciplinary team to offer comprehensive, research-based interventions.

State of New Mexico

August 1995 – September 1998

Investigator, Educator, Advocate, Coach, Trainer

- Collaborated with high-risk families on short-term intensive interventions to preserve family unity and prevent children from entering state custody.
- Conducted client-centered assessments and implemented tailored intervention strategies to address clients' needs and goals, offering direct support.
- Facilitated the development of healthy communication skills, clear expectations, agreements, and strength-building in clients.
- Employed conflict management techniques in crisis intervention situations.
- Evaluated risk and safety in potentially volatile environments.
- Navigated intricate systems to enhance the capacity of individuals and families for positive outcomes.
- Coordinated with multiple agencies, from law enforcement, the judicial system, to non-profit support systems, to streamline investigations and devise solutions for family and child safety needs.

Education

Updated Online PCC Marker Training	2022
Coaching SuperVision Academy	2022
ICF – PCC Marker Training – Royal Roads	2018
inviteCHANGE	
Mentor Coach Cert Course – Audit	2018
Team and Group Coaching	2017
Advanced Authentic Presence	2016
Mentor Coach Certification Course	2016
Advanced Credentialed Coach Pathway	2015
Voice Dialogue	2015
Mindfulness Coaching School	2016
Neuroleadership/Results Coaching	2007/2008
MSW, Social Work, NMSU	1993 - 1995
BFA, Photography/Art History, UNM	1992

Certifications/ Trainings

- ❖ Developed and Train the Coaching with the Power of Metaphor Certification (POM)
- ❖ Certified Coaching Supervisor (CSA)
- ❖ Board Certified Coach (BCC) 2021
- ❖ Master Certified Coach (MCC) 2018 – International Coach Federation (ICF)
- ❖ ICF ACC and PCC Assessor 2021
- ❖ Foundation EMCC – Team Coach
- ❖ PCC Marker Training – ICF
- ❖ Professional Certified Coach (PCC) 2016 – ICF
- ❖ Certified Mentor Coach - ICF
- ❖ Associate Certified Coach (ACC) 2014 - ICF
- ❖ LICSW – Clinical Social Worker – Washington State 2013 to present
- ❖ LISW – Clinical Social Worker – New Mexico 1998 - 2013
- ❖ MSW/LMSW – Masters of Social Work/ Licensed Masters of Social Work – New Mexico 1995 - 1998
- ❖ Trained in the Five Behaviors Model
- ❖ Certified EMDR – PTSD – Complex Trauma Practitioner
- ❖ 7 Habits of Highly Effective People Trainer
- ❖ Tilt365 Character Tool
- ❖ Hogan Assessment Tool – Hiring and talent development tool'
- ❖ Meyers-Briggs Type Indicator – Team building and awareness development
- ❖ EQi- 2.0 and EQ 360 Tools – Identifies emotional intelligence
- ❖ The Gottman Institute – Relationship Training Level I and Level II
- ❖ Mediation Training, I and II

Volunteerism

Annual volunteer with the Rotary Auction Bainbridge Island, WA	2025-present
International Coach Federation (ICF) WA Chapter	
Director of Virtual Learning	2016 - 2019
Chapter President	2017
Chapter Past President	2018
Buy Nothing Project – Organizational Coach	2015 – 2018
Big Brothers/Big Sisters	2010 – 2013
International Coach Federation (ICF) NM Chapter	
Treasurer	2008 – 2009
Prior to 1993	
Juvenile Probation and Parole	
Rape Crisis	
Agora Hotline	

D. Marlene Thomas, PCC

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. She provided coaching and 360 debriefing to members of the TSA Leader Assessment Program, as well as coached in the TSA Aspiring Leader Development Program.

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 returning military service members and their families/caregivers during their transition to civilian life.

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)

Ms. Thomas holds a Master's Degree in Management/Human Resources from the University of Maryland University College, as well as certificates in management from Harvard University and the Federal Executive Institute.



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 Certified Professional Coach
(CPCC)
DiSC Certified Trainer & Partner
True Colors Facilitator
GTCI Certified Team Coach
Brain-Based Coach Certification

Education

M.S. Management, University of
Maryland University College
(UMUC)

B.S. Technology and
Management (UMUC)

Federal Executive Institute (FEI)

Harvard University (Certificate)



Washington Coaching Group

Susan Sussman, MCC



susan@fasttrackcoachacademy.com

For 29 years (1994-present) Susan Sussman been an executive and life coach:

- From 2019 – Present she has done Federal executive coaching for TSA with clients at a variety of executive levels and is skilled in providing 360 assessment feedback in a way that allows it to be heard.
- Non-Governmental work (from 1994-present) has included coaching attorneys, physicians, architects, clergy, educators, and business executives.

For 29 years (1994-present) she has been a coach trainer and from 2019-present has been the director of and designer & creator of curricula for FastTrack Coach Academy, an ICF-approved coach training program.

- Susan provides organizations, and the people who work within them, the skills and tools to include or expand coaching as an approach to leadership development.
- She has expertise in leadership coaching and coach training, and her clients have included Federal supervisors at the GS 12-13 level; mid-level managers in the GS 14-15 range; and SIS/SES officers from a wide variety of Government agencies.

For 10 years (2013-2023) she has trained internal coaches for the HR departments of a variety of different university hospital centers, all with numerous campuses.

Susan uses a strengths-spotter approach to her work that encourages clients and trainees to develop the ability to determine which of their strengths will allow them to meet and overcome the challenges they face.

She is a Master Certified Coach (MCC) through the International Coaching Federation and has M.Ed. in educational psychology from Temple University in Philadelphia, Pa., with a focus in group dynamics.



Washington Coaching Group

Michael D. Rochelle, Professional Certified Coach, ICF

Lieutenant General (Retired) Michael Rochelle is founder and President of MDR Strategies, LLC, an executive, leadership coaching and leader development firm located in northern Virginia.

Immediately upon retirement from the United States Army in 2009, General Rochelle founded MDR Strategies, LLC and operates a thriving executive coaching and leader development and training concern. He coaches and consults internationally on a broad range of leader development, team leadership, and team coaching matters.

General Rochelle culminated his distinguished career as the Deputy Chief of Staff for Personnel, G-1, Headquarters, United States Army. In this position, he served as the U.S Army's senior-most Human Resources Officer. In this position, he was responsible for all human resources policy and oversaw human resource management for the 1.1-million-person United States Army. Prior to his service as Army G-1, General Rochelle's service included numerous world-wide command and staff billets, including Commanding General U.S. Army Recruiting Command, Fort Knox, KY; Director, U.S. Army Installation Management Agency, Alexandria, Virginia; Commanding General, U.S. Army's Soldier Support Institute, Fort Jackson, SC, and Senior Military Assistant to the Deputy Secretary of Defense, Office of the Secretary of Defense.

Following his transition from military service, Rochelle served on the Board of Governors of the Center for Creative Leadership (CCL), the Board of Directors of the Military Officers Association of America (MOAA), the Board of Visitors of Norfolk State University, Norfolk, Virginia, the Board of Directors, Globili, LLC of Cincinnati, OH. He currently serves on the Board of Advisors, Bullseye Engagement of Houston, TX.

Michael Rochelle and MDR Strategies, LLC's coaching clients include:

- Walmart (corporate officers)
- John Deere, Inc. (corporate officers)
- The U.S. Department of Energy
- George Mason University Leader Development Programs
- The Pac-12 Athletic Conference
- New England Die Cutting, Inc
- Frontier Communications, Inc.
- Leadership Arlington; Arlington, VA
- Stand Beside Them (Wounded Warriors in Transition)
- The Smithsonian-Mason School of Conservation
- Long Island University, Long Island, NY

- The International Foundation for Election Security (IFES)
- The Office of the Director of Intercollegiate Athletics, George Mason University (Team Coaching)

EDUCATION

Master of Arts in Public Administration, Shippensburg State
University Bachelor of Arts, Foreign Language Education, Norfolk
State University

Graduate, United States Army War College

Professional Certificate, Leadership Coaching for

Organizational Performance, George Mason University

Professional Certificate, Coaching Teams for Sustained

Performance, The Miro Group and One21Five

The Foundations Course, Newfield Network

Gateway to Team Coaching, Global Team Coaching Institute

Certificate of Completion, Leadership Development Program (LDP), Center for
Creative Leadership

Certificate of Completion, Conversations2Mastery, The Washington Coaching Group

Mentor Coaching Certification Program, Invite Change, Inc.

Certificate of Completion, Masterful Coaching Course Certificate Program, George
Mason University

PROFESSIONAL ASSOCIATIONS and AFFILIATIONS

George Mason University Coaching Fellow and Coach Training
Faculty

Senior Associate (Coach), Cambria Consulting, Boston, MA

Coaching Fellow, The Institute of Coaching (IOC), at McLean, Harvard
Medical School

Member, International Coach Federation (ICF)

Society for Human Resource Management (SHRM)

Military Officers Association of America (MOAA), member and former
Board Member

Former member, National Association of Corporate Directors.

Board member and Treasurer, Capital Area Chapter, National
Association of Corporate Directors (NACD)



Washington Coaching Group

Larisa Harrington (PCC, C-IAYT) – Executive Leadership & Well-Being Coach

Larisa Harrington's mission is to empower executives and leaders to maximize their potential and be their best selves so they can make a positive impact in their organizations, families, and communities. She believes that effective leadership is rooted in emotional intelligence, healthy communication, and a growth mindset. Specializing in mindfulness, stress management, burnout recovery and prevention and work-life balance, Larisa supports clients in deepening their self-awareness so they can make a bigger impact without sacrificing their health and well-being.

Key Accomplishments

- As a Professional Certified Coach with over 2 decades of experience supporting individuals and teams, Larisa has coached and trained thousands of professionals in all levels of leadership to include SES, C-Suite, mid-level managers, and individual contributors throughout the government, corporations, small businesses, non-profits, healthcare and education.
 - Within the Transportation Security Administration's Rising Leader Development Program, Larisa has coached 100+ leaders from TSOs to Assistant Administrators. Additionally, she has provided coaching and training to leaders from the National Security Agency, Federal Drug Administration and National Institutes of Health over the last 10 years.
 - Larisa, a 20-year Air Force veteran, Larisa coached and trained civilians and military members working in the intelligence community. She has a deep understanding of how high-stress environments affect an individuals' health and well-being and their ability to sustainably function and perform.
 - As an executive well-being consultant, trainer and speaker, Larisa has extensive experience in providing individuals and teams with soft skills and tools to improve their communication, productivity, performance, efficiency, effectiveness.
-

Professional History

Well-Being Coach & Strategist, Founder, Strong By Nature Wellness, 2007-Present
Mindset, Mindfulness & Yoga Coach, Air Force Wounded Warriors, 2016-Present
Executive Leadership Coach, The Washington Coaching Group, 2021- Present
Clarity Coach, Holistic Business School, 2022-Present
Executive Coach & Consultant, Founder, Better Execs, 2022-Present
Turkish Linguist & Readiness NCO, U.S. Air Force, 1997-2017

Certifications/Trainings

George Mason University – Leadership Coaching for Organizational Well-Being Certificate, 2019
Professional Certified Coach (PCC) – International Coach Federation, 2020
Polarity Approach to Continuity and Transformation Certified – Polarity Partnerships, 2020
Leadership Development – American Management Association, 2016
Group and Individual Crisis Intervention – International Critical Incident Stress Foundation, 2016



Sarah Sutton, MCC is a seasoned, senior integrative leadership, and she looks forward to meeting you. She started her career solidly in the fields of corporate wellness and communications, before launching her business, Truce, LLC 18 years ago, in addition to being an executive coach and Core group guide facilitator for Chief.

Sarah excels at empowering especially established and rising C-suite women leaders to uplevel your skills and fast forward your career, all while reclaiming your self-care. You develop unbeatable confidence through:

- 1) branding your unique leadership style and executive presence for noticeable gravitas;
- 2) assertively communicating during high-stakes conversations, including managing difficult employees, presenting to executive teams and boards, and negotiating for yourself; and
- 3) integrating your life roles for inherent resilience.

The results? You become self-aware of the *real* issues getting in your way, showcase charismatic poise under pressure, make decisions with integrity, gain the trust of those around you, and start deeply exhaling and living each day with energy and purpose. Yes, it really is that life-changing.

In addition to working with clients one-on-one, Sarah facilitates peer mastermind groups and trains global teams especially on conflict resolution, strategic thinking, battling burnout by building real boundaries, and applying relationship intelligence to dynamically lead collaborative and empowered hybrid teams. Her corporate clients lead a variety of company sizes and industries, including healthcare, life sciences, technology, education, government, nonprofit, legal, financial services, insurance, retail, communications, consulting, entertainment, and transportation.

After her own 70-pound weight loss 20 years ago, as well as her evolution from a wellness coach to an executive coach, Sarah remains a passionate advocate of: well-being, role reinventions, lifelong learning (with recent studies in Positive Intelligence, the Enneagram, and workplace psychological safety), and inclusion and belonging. With 3,500+ client hours to her grateful credit, Sarah holds the distinguished Master Certified Coach (ICF MCC) accreditation, an industry top tier held by just 4% of coaches globally. She lives in the Washington, DC area with her husband, rescue dog, and extended family.

- B.A. Boston College
- M.S. The George Washington University
- ICF MCC (International Coaching Federation Master Certified Coach)
- Inaugural NBC-HWC (National Board-Certified Health & Wellness Coach)
- Certified faith-based transformation coach
- Core Strengths SDI 2.0 certified assessment/ team Relationship Intelligence trainer
- Summer 2023: The Leadership Circle Profile; Hogan Suite



Washington Coaching Group



L'Lorenzo Seabrook, MBA, PCC

Leadership Coach

L'Lorenzo works with managers, directors, vice presidents, chief executive and operating officers in the areas of leader development and team performance. He specializes in coaching, facilitation, and training services. Since 2013, professional coaching has been a natural fit as it complements his diverse and mature background of developing leaders and shaping outcomes for nearly three decades. L'Lorenzo focuses on shifting mindsets and capabilities to support individual and organizational success for today and adapts to meet future challenges. He possesses a comprehensive background in effective communications that strengthens professional relationships leading to breakthrough organizational results. He is an achievement driven professional who possesses strong interpersonal, time management, and organizational skills that includes extreme comfort in interacting with personalities in fluid, complex organizational settings.

L'Lorenzo uses practical experiences, perspective, and humor in his approach and maintains strict confidentiality. His coaching style often leads towards a positive impact for organizational effectiveness wherein he effectively builds trust and morale while managing each individual's expectation. As a result of his coaching, leaders frequently report increased work satisfaction, reduced stress, and increased self-confidence and resilience.

L'Lorenzo brings an abundance of practical experience in developing and supporting the professional growth of others while demonstrating leadership strengths that builds and sustains organizational cultures of excellence. He is a leader and a team member who inspires trust, inviting individuals to freely participate in some of the most critical discussions often leading to clarity, organizational competitive advantage and increased productivity. He has led and managed change management activities for over 20 years often confronting new dynamics while providing timely solutions to meet today's challenges. L'Lorenzo is highly adaptable wherein he has operated in environments that required right-now solutions. He is a dynamic facilitator who has developed just-in-time leadership and management training where members participate in immersive learning environments designed to close the gap from the unknown to the known, increase employee engagements, and achieve greater leader/direct report alignment. He is very passionate about serving people and a greater purpose and is often described as open- minded, balanced judgment, tactful, steady and calculating.

The MCC logo is displayed in large, bold, orange and yellow letters on a dark blue background.

ICF Credentials and Standards

is honored to confer upon

Ellen Fulton

the designation of

Master Certified Coach (MCC)™

The designation is earned by demonstrating knowledge and proficient use of core coaching skills through a comprehensive application and evaluation process designed to ensure high standards for the coaching profession and the clients it serves.

Awarded on this day: 3/29/2016

A handwritten signature in black ink, appearing to read "Boris Dobis".

Boris Dobis, ACC
Chair
2022 ICF Credentials and
Standards Global Board

A handwritten signature in black ink, appearing to read "Magdalena Mook".

Magdalena Mook
Executive Director
International Coaching Federation



Valid through: 12/31/2025



Learning Record

Ellen Fulton (Generated on 8/26/2021)

Includes activities thru 8/26/2021

Credits

Core Competency

Achieved	Claimed	Activity Name	Amount
08/26/2021	08/26/2021	PCC Follow-up Training PCCFOLLOWTRAININGCCEU	12.000
			Number of Claims 1
			Total Core Competencies Claimed 12.000

Washington State, USA

www.invitechange.comcustomercare@invitechange.com

Ellen Fulton, MCC
340 Sunset Drive #1704
Fort Lauderdale, Florida
33301

Congratulations Ellen,

You have successfully completed all components of the 2020 inviteCHANGE Mentor Coach Certification Program. It has been an honor and a pleasure to work with you over the past several months.

CONTINUING COACH EDUCATION HOURS:

The International Coach Federation (ICF) has approved this program for Continuing Coach Education (CCE) units for the following hours:

Core Competencies	24.5
Resource Development	3.5

Resource Development includes training formerly called Personal Development, Business Development, or Other Skills and Tools.

MENTOR COACHING HOURS:

This letter confirms that during this program we've worked together from April 2020 through October 2020 for a total of (7) group mentor coaching hours. Please indicate Janet Harvey, MCC as the mentor coach for this component. You also received individual Mentor Coaching hours from an inviteCHANGE Certified Mentor Coach as listed below.

SESSION #	DATE	MENTOR COACH NAME
ONE	May 26, 2020	Jan Berg, MCC

In accordance with current ICF guidelines, our mentor coaching focused exclusively on your professional development in the ICF Core Competencies.

We are very pleased to welcome you to our graduate community and if we may support your excellence in the future, please reach out.

Warmest regards,



Janet M. Harvey, Director of Training
ICF Master Certified Coach



PCC Markers Certificate

is hereby awarded to

Ellen Fulton

This Certificate documents full attendance at

The ICF PCC Markers Training

And satisfied the ICF requirements for

30 Core Competency CCEs

March 6, 2018



Continuing Coach Education Units (CCE Units) can be applied towards re-certification of ICF Credentials.