



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

STANDARD CONTRACT GMU-1836-23-02

This Contract entered on this 25th day of September, 2023 (Effective Date) by Strategy Consulting Team LLC hereinafter called "Contractor" (located at 4000 Legato Road, Suite 1100 Fairfax, VA 22033) 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.

Coaching Vendor Administration for Executive Education Programs

Flat-rate administrative fee based on participant numbers as outlined below:

- 150-199 participants = \$3000
- 100-149 participants = \$2500
- 50-99 participants = \$2000
- 5-49 participant = \$1000

Hourly coaching rate according to the rates listed below:

	Hourly Rate				
	Base Year	Option Years			
SCT Labor Category	Year 1	Year 2	Year 3	Year 4	Year 5
Executive Coach (ICF PCC)	\$ 300.00	\$ 308.00	\$ 315.00	\$ 323.00	\$ 331.00
Leadership Coach (ICF ACC)	\$ 275.00	\$ 282.00	\$ 289.00	\$ 296.00	\$ 304.00

- 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 Summary dated September 14, 2023 (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 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. Such rights, title and interest does not extend to Contractor's proprietary platforms for coaching administration, which shall remain Contractor's Intellectual Property, fully owned by Contractor, but to which tools and sites Mason shall have free use of during the Contract. 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, which shall not be unreasonably withheld. 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.

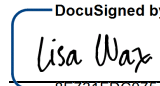
QQ. UNIVERSITY DATA UPON TERMINATION OR EXPIRATION: Upon termination or expiration of the Contract, Contractor will ensure that all University Data are securely returned or destroyed as directed by Mason in its sole discretion within 180 days of the request being made. Transfer to Mason or a third party 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.

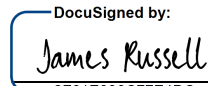
RR. UNIVERSITY REVIEW/APPROVAL: All goods, services, products, design, etc. produced by the Contractor for or on behalf of Mason are subject to Mason's review and approval.

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.

Strategy Consulting Team

DocuSigned by:

 8E731FDC07544BF...
 Signature
 Name: Lisa Wax
 Title: Chief operating officer
 Date: 9/25/2023

George Mason University

DocuSigned by:

 2F61E096C77E4DC...
 Signature
 Name: James Russell
 Title: Purchasing Director
 Date: 9/25/2023



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 Negotiation Summary

Coaching Vendor Administration for Executive Education Programs

MASON Proposed Pricing:

MASON accepts the base year rates for both ICF ACC and PCC-level coaches.

MASON requests to keep this pricing in place for the first two years and increase rates starting in year 3 based on the year 2 and subsequent year pricing that is outlined.

Instead of the hourly admin fees for the Program Manager and the Program Analyst,

MASON proposes a flat-rate administrative fee based on participant numbers as outlined below:

- 150-199 participants = \$2500
- 100-149 participants = \$2000
- 50-99 participants = \$1500
- 5-49 participant = \$1000

SCT Pricing as outlined in the Proposal



July 6, 2023 | GMU-1836-23
GMU Leadership Coaching & Development Services
SCT Proposal

4. PROPOSED PRICING [XIII.B.5]

[XIII.B.5.a.ii Proposed Pricing: Coaching Vendor Administration for Executive Education Programs hourly rate] Table 2 lists SCT's hourly rates for all years included in the GMU-1836-23 solicitation. We propose 4 labor categories to cover all administrative and coaching roles. All travel-related expenses and overhead costs are included in these proposed rates. The period of performance (IX) is (1) year from effective date of contract with four (4) successive one-year renewal options (or as negotiated). We have discounted our coaching rates five percent from our GMU BPA rates.

Table 2. SCT's proposed pricing for GMU-1836-23.

#	SCT Labor Category	Hourly Rate				
		Base Year	Option Years			
		Year 1	Year 2	Year 3	Year 4	Year 5
1	Program Manager	\$ 154.00	\$ 157.85	\$ 161.80	\$ 165.84	\$ 169.99
2	Executive Coach (ICF PCC)	\$ 248.19	\$ 254.39	\$ 260.75	\$ 267.27	\$ 273.96
3	Leadership Coach (ICF ACC)	\$ 221.11	\$ 226.64	\$ 232.30	\$ 238.11	\$ 244.06
4	Program Analyst	\$ 129.50	\$ 132.74	\$ 136.06	\$ 139.46	\$ 142.94

SCT Counter-proposed:

SCT Proposed Pricing:

- SCT and MASON have reached mutual agreement of the rates for both ICF ACC and PCC-level coaches.
- SCT declines the request to keep ACC and PCC coaching pricing in place for the first two years. SCT will adjust rates in Year 2 in accordance with market rates to remain the provider of choice for highly qualified coaches.
- SCT agrees to flat-rate administrative annual fees. However, to ensure sufficient resources to accommodate the anticipated workload and capabilities required, SCT proposes the following annual fee based on participant numbers as outlined below:
 - 5-49 participants: \$7,000
 - 50-99 participants: \$11,500
 - 100-149 participants: \$16,000
 - 150-199 participants: \$20,500
 - Each additional 50 participants: +\$4,500

Mason counter-proposed pricing for your consideration and response.

Coaching Vendor Administration for Executive Education Programs

Mason proposes a flat-rate administrative fee based on participant numbers as outlined below:

- 150-199 participants = \$3000
- 100-149 participants = \$2500
- 50-99 participants = \$2000
- 5-49 participant = \$1000

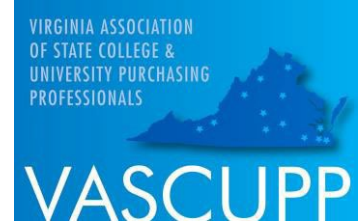
Mason proposed the hourly coaching rate according to the rates listed below:

	Hourly Rate				
	Base Year	Option Years			
SCT Labor Category	Year 1	Year 2	Year 3	Year 4	Year 5
Executive Coach (ICF PCC)	\$ 300.00	\$ 308.00	\$ 315.00	\$ 323.00	\$ 331.00
Leadership Coach (ICF ACC)	\$ 275.00	\$ 282.00	\$ 289.00	\$ 296.00	\$ 304.00

SCT accepts the **flat-rate administrative fee** and **hourly coaching rate** terms proposed by Mason in the GMU-1836-23 2nd Negotiation Letter dated August 30, 2023.



Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, VA 22030
Voice: 703.993.2580 | Fax: 703.993.2589
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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/Offeree 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.



George Mason University (GMU)
Leadership Coaching & Development Services

GMU-1836-23

Submitted to:

Sara Siddall, Strategic Sourcing Manager

James F Russell, Director

Submitted by:

Strategy Consulting Team, LLC

A Woman-Owned Small Business
4000 Legato Road, Fairfax, VA 22033

www.StrategyConsultingTeam.com

Contractor Point of Contact:

Sue Nicholas

CEO

SNicholas@StrategyConsultingTeam.com

(703) 408-4056

DSBSD SWaM Certification: 717336

TIN: 47-4434021



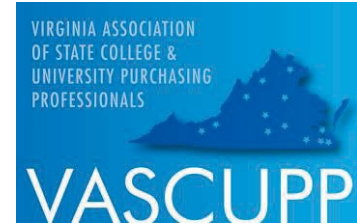
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Purchasing Department
4400 University Drive, Mailstop 3C5
Fairfax, VA 22030
Voice: 703.993.2580 | Fax: 703.993.2589
<http://fiscal.gmu.edu/purchasing/>



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: Strategy Consulting Team LLC

DBA: Strategy Consulting Team (SCT)

Address: 4000 Legato Road, Suite 1100
Fairfax, VA 22033

Date: 6/26/2023

NICHOLAS.SUE.ELIZABETH.13929535
By: 62 Digitally signed by NICHOLAS.SUE.ELIZABETH.13 92953562 Date: 2023.06.26 22:18:39 -04'00'

Signature

FEI/FIN No. 47-4434021

Fax No. 703-896-7601

Email: snicholas@strategyconsultingteam.com

Name: Sue Nicholas

Title: CEO

Telephone No. 703-408-4056

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

SWaM Certification Number: 717336

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.



1. EXECUTIVE SUMMARY [XIII.B.2]

[XIII.B.2 Executive Summary: Offerors must submit an executive summary at the beginning of the proposal] In this proposal, Strategy Consulting Team (SCT) is bidding solely on Part 2 of the Statement of Needs, **Coaching Vendor Administration for Executive Education Programs**. George Mason University's (GMU) Center for the Advancement of Well-Being (CWB) is offering through its executive education programs one-on-one coaching for up to 500 participants annually. SCT, an experienced GMU and CWB partner, has proven capability in large-scale for large scale coaching contracts using International Coaching Federation (ICF)-certified personnel.

[XIII.B.2] SCT is a certified Virginia Department of Small Business and Supplier Diversity (DSBSD) Woman-Owned Small Business. The company primarily serves the federal government, non-profits, and academia in areas of human capital and leadership development. Since 2018, SCT has supported George Mason directly through leadership development and coaching services. We have also supported Virginia Tech through leadership and mentor coaching. SCT's proposed Program Manager, Adam Schmidt, has served as SCT's primary point of contact to GMU. Based on our capabilities and experience, we are prepared to support GMU in coaching vendor administration.

[XIII.B.2] Specialized experience. SCT has held, and currently holds, simultaneous, large-scale coaching contracts requiring coaches accredited by the ICF as well as monthly reporting. These clients include:

- Army Coaching Program (ACP) (2023-2026): Over 50 coaches for 1,100 participants
- Securities & Exchange Commission (SEC) (2022-2027): Over 20 coaches for 43 participants
- National Institute of Food & Agriculture (NIFA) (2021-2022): 5 coaches for 25 participants

[XIII.B.2] Technical competence. All SCT coaches are certified by the ICF at the Master, Professional, or Associate level. Many hold additional coaching certifications from universities such as George Mason and Georgetown. SCT coaches facilitate sessions aimed to develop personal and professional goals and strategies for reaching those goals. We offer proven tools such as goal-setting frameworks, coaching agreements, detailed tracking of coaching sessions, and effective virtual facilitation to ensure that everyone who engages with the developmental opportunity is given a customized—yet consistent—experience.

[XIII.B.2] Project management capability. To support the administration, management, tracking, and availability of the coaching services, SCT will provide a virtual platform dedicated to the CWB coaching program. The platform will be the primary access point for coaching requests, assigning coaches, scheduling sessions, and enabling rapid reporting. In support of aligning coaches and participants, the portal will include a bio and one-minute video from each coach on their coaching approach. Importantly, the platform is also the site for receiving customer support, whether it be outreach to a coach, a technical issue, or the need to reschedule.

[XIII.B.2] Corporate summary. SCT is in good legal standing. We are not involved in any litigation, investigation, or action from any state, local, federal, or other regulatory body, or lawsuits. Our name has not changed since being incorporated in 2015.

2. QUALIFICATIONS AND EXPERIENCE [XIII.B.3]

a. BACKGROUND AND BRIEF HISTORY OF THE COMPANY [XIII.B.3.A]

[XIII.B.3.a Background and brief history of your company] Firm History and Current State. SCT was founded in 2015 by Sue Nicholas to be a trusted partner that delivers results and navigates complex challenges for higher education, public sector, and not-for-profit clients. In 2020, SCT was certified by the US Women's Chamber of Commerce as a Woman-Owned Small Business. Our core values that guide our actions are Integrity, Superior Value, Excellence, Innovation, Teamwork, Empowerment and Continuous Learning. SCT's corporate headquarters are in Fairfax, Virginia and we are registered with the DSBSD as a Small, Women-owned, and Minority-owned (SWaM) business.

[XIII.B.3.a] SCT has grown strategically and steadily as an organization over the past seven years. In 2017, SCT was awarded its General Services Administration Schedule contract and in 2018, SCT was one of eight small business awardees for the Human Resource Solutions (HRS) Personnel Life Cycle Solutions (PLS) Indefinite Delivery, Indefinite Quantity (IDIQ) contract. Under these contracts, SCT provides organizational improvement and talent management expertise to a variety of government clients. Combined with its HRS PLS teaming partners, SCT has reached across six continents and 10,000+ employees to support the DoD and its global mission to serve. SCT has recently been awarded blanket purchase agreements with NASA, the SEC, and the Department of Commerce (DOC), as well as a large-scale coaching contract with the Army.

[XIII.B.3.a] SCT has adopted a Diversity, Equity, Inclusion, and Accessibility (DEIA) Plan to demonstrate commitment to removing bias and barriers, ensuring equity, building inclusive teams, and cultivating a sense of belonging. This DEIA Plan identifies qualitative and quantitative approaches utilized to measure progress in the areas of Leadership and Commitment, Diverse Talent, and Culture and Sustainability:

- Leadership and Commitment – Demonstrate leadership's commitment and accountability to DEIA. Identify quantitative approaches utilized to measure the progress of a Diversity and Inclusion program.
- Diverse Talent – Demonstrate a pursuit of a high-performing diverse workforce from underserved communities.
- Culture and Sustainability – Demonstrate how an inclusive and fair work environment will be cultivated and maintained.

[XIII.B.3.a] Our CEO. A versatile and accomplished leader, **Sue Nicholas** is an ICF Master Certified Coaching (MCC) and has held a variety of leadership positions in both the public and private sectors. She has successfully led large complex teams and organizations, building new capabilities and leading expansion into new markets through innovative, pragmatic, and integrated solutions. Sue offers experience in leading high performing teams in various sectors including strategic planning, organizational assessment and design, leadership coaching, change management and communications, human capital strategic planning, workforce analytics, manpower studies, talent management, performance management and continuous process improvement across federal government, academic, private, and non-profit markets.



[XIII.B.3.a] Sue is a trusted advisor to senior-level executives and has a reputation for building long-lasting relationships. She is a thought leader and outstanding public speaker that has served as a member of a number of boards of advisors and directors. Sue holds a Bachelor of Science in Information Systems from Thomas College and a M.B.A. from Northeastern University. She is certified in Leadership Coaching from Georgetown University, holds a MCC from the International Coaching Federation (ICF), and is a certified practitioner in The Leadership Circle Profile, Leadership Culture survey, and Gallup Strengths Finder. She is also a certified Project Management Professional (PMP).

**b. NAMES, QUALIFICATIONS AND EXPERIENCE OF PERSONNEL TO BE ASSIGNED TO
WORK WITH MASON [XIII.B.3.B]**



[XIII.B.3.b] Adam Schmidt, MCC, Advanced Certificate in Team Coaching (ACTC), PMP, is an expert in training and career development. A former Army Officer, Mr. Schmidt is experienced in designing, developing, and delivering large-scale talent development strategies for organizations both public and private. Currently, Mr. Schmidt manages SCT's coaching contracts with the Army, SEC, and DOC.

[XIII.B.3.b] Mr. Schmidt is a solutions-driven project manager and consultant with the ability to conceptualize, design and implement complex projects leveraging both industry-standard and innovative management practices. As a skilled facilitator, certified leadership coach and communicator, he offers exceptional ability to connect with and enable high performing leaders and teams. He is a certified MCC, PMP and facilitator. He holds a bachelor's degree from the United States Military Academy, a Masters of Public Policy from the University of Michigan and Executive Certificates in Leadership Coaching and Facilitation from Georgetown University.

[XIII.B.3.b] A leadership development expert, Mr. Schmidt offers 15 years' experience in providing strategic leadership, executing operationally, and building effective, collaborative teams. Adam has delivered leadership coaching and training to federal senior leaders including leadership development, cross-organizational interactions, organizational capacity and performance, and emotional intelligence. As a leadership development manager at Booz Allen Hamilton, Adam designed and developed the firm's leadership development programs and facilitated numerous virtual and in-person leadership programs. Prior to Booz, Adam was the program manager for leader development at LMI, responsible for programs and assessments for a global workforce of 1,300 people. Adam has served as a leadership coach and trainer for over 60 federal government leaders. He is a solutions-driven manager and consultant with the ability to conceptualize, design and implement complex projects leveraging both industry-standard and innovative management practices. As a skilled facilitator, certified leadership coach and communicator, he offers exceptional ability to connect with and enable high-performing leaders and teams.

[XIII.B.3.b] Additional coaches available for SCT to call on to support the Mason Executive Education Programs are listed on the following page.



Name	ICF Certification	Name	ICF Certification
Abigail K Wenner	PCC	Kim Boyd	ACC
Adam Schmidt	PCC	Kyle Moses	PCC
Andrea Vinyard	ACC	Lauren Springer	PCC
Angel Diaz	PCC	Leslie Schreiber	ACC
Azra Syed	ACC	Linda Stephens-Jones	PCC
Becky Lee	ACC	Lisa Kuruvilla	PCC
Brie Knox	ACC	Lisa Spinelli	ACC
Candi Campbell	PCC	Mark Staelgraeve	ACC
Carolyn Lee	ACC	Martha Wescoat-Andes	ACC
Catherine Hargenrader	PCC	Mary Shaffran	PCC
Cathy McClain	PCC	Megan Broker	PCC
Chris Thyberg	ACC	Melissa Kessler	ACC
Christina Schiavone	PCC	Melissa Schreiberstein	ACC
Chuck Palm	PCC	Michael Tucker	PCC
Deb Friedman	ACC	Michelle Levister	ACC
Dwayne Buckingham	ACC	Mindy Facenda	ACC
Ellen Petersen	PCC	Natalia Vayner-Heyraud	ACC
Frieda Cheslow	ACC	Norm Davis	PCC
Gary Phillips	ACC	Olu Burrell	PCC
Heather Soubra	ACC	Richard Christ	PCC
Heidi Grahm	ACC	Roberta Miceli	PCC
Hilarie Gaylin	PCC	Roger Campbell	ACC
James Dobbs	PCC	Sadia Gazanfar	PCC
Jane Maliszewski	PCC	Sandra Gregory	PCC
Jennifer Boon	ACC	Sara Rund	PCC
Jennifer Brand	ACC	Shayla Jennings	ACC
Jennifer Copeland	ACC	Teresa Kloster	PCC
Jennifer Niggemeier	PCC	Tom Fox	PCC
Jeohanna Martinez Bigles	ACC	Tony Cerella	ACC
Josh Phillips	ACC	Tony Stamilio	PCC
Kenneth Williams	ACC	Valerie Franco	ACC

Note: ACC = Associate Professional Coach; PCC = Professional Certified Coach; MCC = Master Certified Coach

c. REFERENCES THAT DEMONSTRATE THE OFFEROR'S QUALIFICATIONS [XIII.B.3.C]

[XIII.B.3.c Three (3) references that demonstrate the Offeror's qualifications]

GEORGE MASON UNIVERSITY (GMU) CENTER FOR THE ADVANCEMENT OF WELL-BEING (CWB)	
Contact Name	Dr. Pamela L. Patterson, Associate Vice President, University Life
Phone Number	(703) 993-2884
Email Address	ppatter2@gmu.edu
Period of Performance	October 22, 2018 – January 23, 2023
Nature of work	Leadership Training and Development Services

ARMY COACHING PROGRAM (ACP)	
Contact Name	LTC Andrew Yang, Army Talent Management Task Force
Phone Number	(210) 454-5948
Email Address	andrew.k.yang.mil@army.mil
Period of Performance	May 1, 2023 – October 31, 2026
Nature of work	Leadership Development Assessments and Coaching

SECURITIES AND EXCHANGE COMMISSION (SEC)	
Contact Name	Christelle LaPolice, Senior Advisor for Learning & Development
Phone Number	(202) 551 4143
Email Address	lapolicec@sec.gov
Period of Performance	November 15, 2022 – November 14, 2027
Nature of work	Executive Coaching

NATIONAL INSTITUTE OF FOOD AND AGRICULTURE (NIFA)	
Contact Name	Drenda Williams, Acting Associate Director for Operations
Phone Number	(816) 772-5163
Email Address	drenda.williams@usda.gov
Period of Performance	September 15, 2021 – September 14, 2022
Nature of work	Executive Coaching

d. EXPERIENCE AND EXPERTISE [XIII.B.3.D]

[XIII.B.3.d For each service proposed from section XI, Statement of Needs, include a brief paragraph summarizing your experience and expertise]

[XIII.B.3.d] Summary of Strengths and Capabilities. SCT's subject matter expertise in coaching and coaching program administration is derived from an experienced and credentialed workforce thoughtfully composed through the hiring and contracting process and a dedicated investment in enhancing capabilities through thought leadership, communities of practice, and third-party training and credentialing. SCT's relevant capabilities include:

[XIII.B.3.d] Leadership Assessment and Coaching: The professional coaching methodology used by SCT trusts that every client is competent, creative, and resourceful. SCT partners with clients

in a journey of discovery and solution building. We employ assessment tools and feedback processes to understand the leader's strengths and potential derailers. Every SCT coach is certified by the ICF—the gold standard in professional coaching. SCT coaches pride themselves on powerful questioning, authentic listening, and client accountability. We hold clients accountable to making shifts within themselves to positively impact organizational effectiveness. Benefits of SCT's approach include aligning individual leader goals with organizational goals, creating more effective and empathic leadership teams, and increasing motivation and engagement with all levels of employees.

[XIII.B.3.d] *Provide coaches for large scale contracts/Ability to support multiple simultaneous coaching programs:* SCT has held, and currently holds, simultaneous, large-scale coaching contracts requiring coaches accredited by the ICF. These clients include:

- ACP (2023–2026): Over 50 coaches for 1,100 participants
- SEC (2022–2027): Over 20 coaches for 43 participants
- NIFA (2021–2022): 5 coaches for 25 participants

[XIII.B.3.d] *Coach selection and assignment process:* For large-scale coaching programs such as Army Coaching programs, SCT has used a five-step coach selection and assignment process, described in detail in Section 3 of this proposal. SCT has an extensive network of ICF-certified coaches to recruit from, including our existing coach bench; those available through our strong connections with ICF, GMU, and Georgetown University; and those accessible to us through personal connections and referrals.

Following verification that each coach meets SCT and task standards, SCT's coaches are invited to our customized online platform, where they provide a written biography, photo, short video biography, assessment certifications and availability to coach. These items will be used as the data available for future clients to review their potential coaches. Coachees (clients) then enter their preferences for coaching focus or coach characteristics in the portal and use the portal to search and identify "top" matches. Based on those inputs, SCT staff makes the final pairing based on preference, expertise, and availability.

[XIII.B.3.d] *George Mason and other university experience.* Since 2018, SCT has supported George Mason directly through leadership development and coaching services. We have also supported Virginia Tech through leadership and mentor coaching. Adam Schmidt has served as SCT's primary point of contact with GMU.

RESUME

[XIII.B.3.d.i Resume with education, certifications, and projects related to the service proposed]

Adam Schmidt (key), Program Manager & Executive Coach, MCC, PMP

<i>Number of years supporting executive coaching</i>	10+ years
<i>Executive Coaching certifications completed</i>	MCC, ICF, 2022 Leadership Coaching Certificate – Georgetown University, 2015 Facilitation Certificate - Georgetown University, 2017 The Leadership Circle 360 Assessment Certification Training
<i>Agencies and organizations provided executive coaching for</i>	Army Acquisition Workforce (AAW), Department of Energy, Arlington National Cemetery (ANC), US Army, Booz Allen Hamilton, NATO, LMI, NIFA
<i>Program management experience</i>	Army Acquisition Workforce, Booz Allen Hamilton, NATO, LMI, NIFA
<i>Degrees and Certificates</i>	Master of Public Policy, University of Michigan, 2011 BS, Electrical Engineering, United States Military Academy, 2003 PMP

Leadership Development/Coaching Philosophy

Adam's facilitation style is shaped by the fundamentals of ICF Professional Coaching—powerful questioning, authentic listening, accountability and being fully present for clients. He guides teams to overcome obstacles—both real and perceived—while seamlessly integrating new leader development concepts and theory. He enables groups to explore their strengths and weaknesses, make distinctions about their origins and experiment with sustainable ways to leverage their offerings and opportunities to improve.

Adam's goal for each client is to expand their self-awareness while developing skillsets and behaviors that will allow them to meet their goals. He will provide objective, unbiased, and knowledgeable perspective to assist clients work through issues that often involve a complex mix of tactical, strategic, and relational components. Adam endeavors to help clients create lasting, transformative and positive change.

Background

Adam brings over 17 years of experience as a former Army officer, leadership coach, and organizational effectiveness consultant. Adam partners with clients in thought-provoking and creative processes that inspire them to unlock their potential. He has an extensive background in strategic leadership, coaching, facilitation, communications, and leadership development, with a strong track record of building effective, collaborative relationships.

As a leadership development manager at Booz Allen Hamilton, Adam designed and developed the firm's leadership development programs and facilitated numerous virtual and in-person leadership programs. Prior to Booz, Adam was the program manager for leader development at LMI, responsible for programs and assessments for a global workforce of 1,300 people.



Adam Schmidt, Program Manager & Executive Coach, MCC, PMP – Page 2

Strategy Consulting Team, Senior Consultant, October 2018–Present

- ◆ As SCT's Learning and Development lead, engages with senior leaders in leadership development, strategic planning, talent management, succession planning, employee engagement, and training, strategic communications and business and workforce transformation.
- ◆ **ACP:** For the Army Talent Management Task Force, designed, developed, and now implements a coaching program for over 1,100 leaders from across the United States Army. Supported by a large team of ICF coaches, this work will result in over 5,000 coaches' hours per annum. This large program required the development of customized software to register coachees and coaches alike, while tracking progress with each individual client.
- ◆ **SEC:** For the SEC, manages an enterprise-wide level coaching program for over 40 participants, including the section of coaches, coach and client connection and tracking of coaching progress.
- ◆ **NIFA:** As the ICF Master Certified Coach (MCC), leads and manages NIFA Executive Coaching program for over 40 senior government leaders and provides leadership coaching to NIFA leaders. In addition to quality control of coaching, tracks sessions completed, client chemistry issues and organizational themes.
- ◆ **AAW:** Provides leadership coaching to AAW leaders. Delivers leadership training and group coaching while supporting the Professional Development and Leadership Development Human Capital Strategic Plan (HCSP) leads.
Serves as lead analyst and facilitator providing specialized, analytical, and technical expertise in the continued development and execution of a HCSP for the AAW. Provides specific focus on leadership coordination for the Army Director for Acquisition Career Management Office.
- ◆ **ANC:** As a Training and Leadership Development Specialist, assessed and provided recommendations for technical training curriculums.

Booz Allen Hamilton, Manager, Leadership Development, April 2018–November 2018

- ◆ Designed, developed, and implemented the firm's leadership development programs and facilitated virtual and in-person leadership programs and sustainment events. Collaborated with a team of professionals that provided deep leadership development expertise, project and program management and stakeholder engagement.
- ◆ Assessed leadership development needs and improved content and processes to ensure programs remain relevant and impactful while managing all design and operational aspects of leaderships programs, including communication, coaching, diagnostics, residential sessions, vendor management, and budget forecasting.

LMI Government Consulting, Manager, Corporate Leadership Coaching, 2015–2018

- ◆ Conceptualized, developed, and implemented an innovative Corporate Leadership Coaching. Provided leadership coaching programs and facilitated leadership seminars for employees and employee groups with a focus on adult developmental theory, leadership skills, assessments, career development, and coaching-management.

United States Army Officer, July 2003–May 2010

PAST PERFORMANCE DESCRIPTIONS

[XIII.B.3.d.ii Include up to three past performance descriptions]

GEORGE MASON UNIVERSITY CENTER FOR THE ADVANCEMENT OF WELL-BEING LEADERSHIP TRAINING AND DEVELOPMENT SERVICES

Contact Name	Melissa A Schreiberstein, Director of Well-Being Programs
Phone Number	703-993-4264
Email Address	mschrei6@gmu.edu
<p>[XIII.B.3.d.ii] Summary of Engagement: The objective of this effort was to support the George Mason Leadership Coaching for Organizational Well-Being program. Leveraging SCT's ability to quickly assemble exceptional expertise, SCT provided senior subject matter expertise in both professional coaching and training. Certified in the ICFs unique "PCC Marker Assessment," as well as being ICF MCC coaches, SCT staff provided training, assessments, observations, and facilitation for four cohorts of the GMU program.</p> <p>[XIII.B.3.d.ii] Coaching Administration.</p> <p>SCT is conducting PCC assessments for the George Mason Coaching Program. These assessments occur both in real-time during GMU coaching program modules and, more formally, through the PCC-level assessment of recorded sessions for each cohort participant. These assessments are detailed—assessing participants against the nine ICF competencies of professional coaching, providing customized, written feedback and sharing with participants the areas they can build on to be exceptional coaches.</p> <p>[XIII.B.3.d.ii] SCT facilitates Learning Labs for each module within the GMU Leadership Coaching Program. SCT's facilitation approach considers three key elements: (1) how we want participants to feel when a facilitation is complete, (2) what we want participants to know when a facilitation is complete and (3) how we want participants to behave when a facilitation is complete. Leveraging this framework, SCT staff connects with each cohort differently, ensuring that GMU participants are engaged completely and are empowered to learn and develop at their own pace, while still meeting the demands of a sterling program.</p> <p>[XIII.B.3.d.ii] SCT staff provides training for every module of GMU's Leadership Coaching program. This training focuses on myriad topics—from the specific of ICF coaching competencies to the practicalities of coaching in business and the broader professional space of training and development. SCT's training approach is tailored to each group of participants—appreciating varied learning styles, learning speeds and approaches.</p> <p>[XIII.B.3.d.ii] For each cohort of the coaching program, SCT provides mentor coaching for a series of GMU students that enables them to consider their journey into coaching, while SCT's MCC and PCC-Marker certified staff provide program participants with 1:1 training, insight, and mentorship to fully develop their sense of the coaching profession. Further, through the GMU contract, SCT supported Virginia Tech in 2018 and 2021 with leadership coaching sessions, including MCC mentor coaching, and assessment battery to include FIRO-B assessment and Coaching Mindset Index 360 assessment.</p>	
Dollar Value	GMU IDIQ Task Orders: \$34,100.00
Period of Performance	October 22, 2018–January 23, 2023



ARMY COACHING PROGRAM (ACP)

Contact Name	Barbara Jeffries
Phone Number	502-624-6496
Email Address	barbara.j.jeffries5.civ@army.mil
<p>[XIII.B.3.d.ii] Summary of Engagement: SCT provides Professional Executive and Formal Coaching and validated talent assessments to Army Leadership, including 900 Senior Leaders and 180 Junior Leaders.</p> <p>[XIII.B.3.d.ii] Coaching Administration. SCT is providing over 50 coaches in support of large-scale coaching contract. This effort, running concurrently with our large programs with SEC, Army, and DOC, highlight our ability to support multiple simultaneous coaching programs. All coaches that SCT contracts with are accredited by the ICF and have ACC, PCC, or MCC certifications.</p> <p>For the Army coaching program, SCT provides monthly reporting of coaching progress and does so not only through a static monthly report, but designed and now implements a dynamic, real-time dashboard for organizations to track coaching progress across their enterprise for an unlimited number of coach-client engagements.</p> <p>[XIII.B.3.d.ii] SCT established and maintains a coaching portal to assign participants to coaches, schedule coaching sessions, organize data, and provide rapid response to the Army to meet delivery thresholds.</p> <p>[XIII.B.3.d.ii] SCT provides and administers two industry-validated talent assessment instruments – CliftonStrengths and EQi-2.0, that examine and evaluate emotional and social strengths and weaknesses. This includes purchasing the assessment instrument and uploading names into the assessment system, tracking completion, and providing analysis and feedback.</p> <p>[XIII.B.3.d.ii] SCT currently provides ICF-credentialed Coaches with an ACC certification level for Junior Leaders who desire to receive Formal Coaching. Each engagement includes up to five hours of confidential one-on-one coaching with the option for an additional 0.5 hours to provide analysis and feedback to review data from their selected talent assessment instrument. Beginning in late 2023, SCT will provide ICF-credentialed coaches with a PCC certification level for Senior Leaders who desire to receive Professional Executive Coaching.</p> <p>[XIII.B.3.d.ii] SCT's coaching services facilitate the creation and development of work and life balance, personal and professional goals and help develop a strategy for achieving those goals. Additionally, coaching services include navigating participants through significant Army decisions on career transitions, key billets, and executive leadership development in order to further increase self-awareness and profession satisfaction. SCT provides confidential observation and feedback to help participants identify success factors, strengths and developmental opportunities within the Army as well as, produce personal action plans.</p> <p>[XIII.B.3.d.ii] SCT submits a monthly status report no later than the 10th of each month to the Contracting Officer Representative. MSRs provide a synopsis of the SCT's performance for the previous month, including a list of accomplishments, problems and issues, and recommendations for corrections; a list of personnel signed up for coaching and assessments; a list of personnel currently undertaking the assessment; and a list of personnel who have completed the assessment.</p>	
Dollar Value	\$4,381,923.78
Period of Performance	May 1, 2023–October 31, 2026

NATIONAL INSTITUTE OF FOOD AND AGRICULTURE (NIFA)

Contact Name	Mr. Doug Rose, Administrative Operations Officer
Phone Number	(254) 563-8740
Email Address	Doug.Rose@usda.gov
<p>[XIII.B.3.d.ii] Summary of Engagement: SCT provided individual and group coaching, executive development, training, facilitation, and organizational development support to grow and develop NIFA's political appointees and career members of the Senior Executive Service (SES).</p> <p>[XIII.B.3.d.ii] Coaching Administration.</p> <p>For this effort, SCT provided a large bench of ICF-certified coaches for a large-scale coaching and contract with the US Department of Agriculture. This program again highlights SCT's ability to support multiple simultaneous coaching programs as it ran concurrently with our SEC and DOC efforts. For this contract, SCT only contracted with coaches who are accredited by the ICF and have ACC, PCC, or MCC certifications. SCT provides a monthly reporting of coaching progress, including a breakdown of sessions completed, thematic notes and management issues/concerns that need to be addressed.</p> <p>For this contract, SCT leveraged its formal and informal coaching networks to "hand-select" ICF-certified coaches through interviews, resume reviews, and performance reviews of prior work with SCT.</p> <p>[XIII.B.3.d.ii] SCT provided 8 ICF-certified leadership coaches at the ACC, PCC, and MCC levels for leadership coaching of up to 83 individuals, including SES members, supervisors, team leads, and GS-13 level and above employees. Each individual coaching client used a goal-setting worksheet to identify and document goals for their coaching program. SCT coaches provided various assessments to increase an individual's awareness and inform developmental goals. The group coaching includes cultural intelligence training inclusive of the Intercultural Development Inventory assessment; StrengthFinders leadership assessment workshop; and leading a multigenerational workforce workshop.</p> <p>[XIII.B.3.d.ii] SCT provided NIFA with interventions at multiple levels of the organization to ensure increased efficiency, performance, and engagement to meet organization goals. First, we had 1:1 Leadership Coaching individual leaders across multiple locations and time zones, with a focus on building strategic self-awareness, emotional intelligence, and general leadership capacity. Second, we supported the team level with facilitation of executive meetings, group coaching on topics like leading with trust and working through conflict.</p> <p>[XIII.B.3.d.ii] SCT's Leadership Coaching is a customized experience and process that supported NIFA leaders in shaping their ability to accomplish both short- and long-term goals. Our ICF-certified coaches maintained confidentiality, broadened the perspectives of clients, and transformed learning into action. We provided resources, role-play scenarios, tools, readings, and development activities.</p> <p>[XIII.B.3.d.ii] In general terms, the outcomes for the client were Increased focus through setting objectives and goals; Increased awareness through confronting hurdles, developing new insights, discovering new possibilities and courses of actions; and achieved results through managing progress, accountability, and the scope of learning and growth. We maintained timeliness through an Excel-based coaching management spreadsheet.</p>	
Dollar Value	\$249,702.00
Period of Performance	September 15, 2021–September 14, 2022

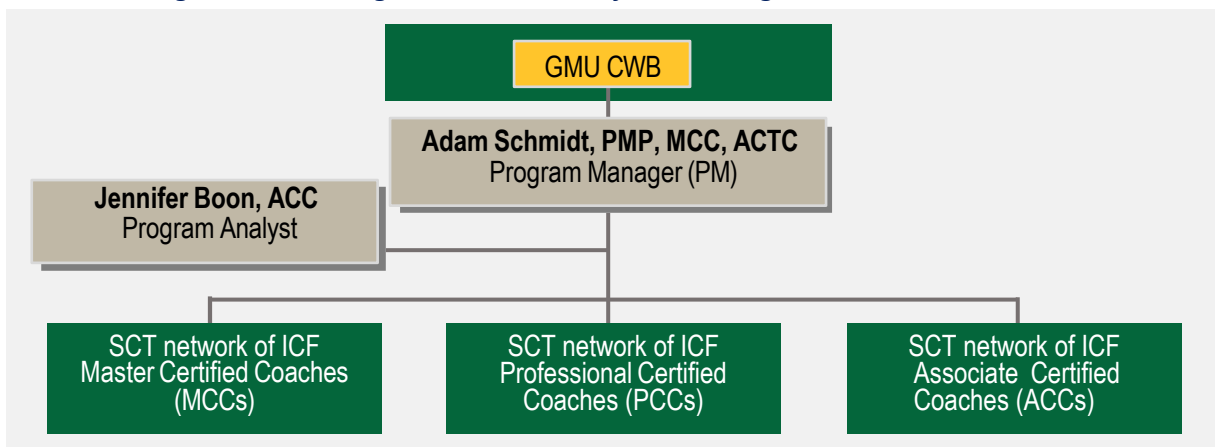
3. SPECIFIC PLAN (METHODOLOGY) [XIII.B.4]

[XIII.B.4 Specific Plan (Methodology)]

COACHING VENDOR ADMINISTRATION FOR LEADERSHIP DEVELOPMENT PROGRAMS [XI.2]

[XIII.B.4.a/b] Figure 1 highlights SCT’s management structure and lines of communication. This management structure design aligns team members with the major functional areas of the task—senior leader coaching, junior leader coaching, and talent assessments—while establishing clear lines of authority and balanced chain of command. SCT will remain flexible to adjusting the team organization chart based on evolving requirements and lessons learned on the task.

Figure 1. SCT’s organizational chart for coaching vendor administration.



[XIII.B.4.a/b] Program Manager (PM). The PM will oversee all contractual and staffing requirements to ensure customer satisfaction. To launch the coaching program with the CWB, the PM will meet with CWB leaders and review the intent of the coaching program, introduce the coaching network, set schedule and communication expectations, and identify potential barriers to success. He will ensure technological capability and alignment to conduct coaching sessions via virtual platform.

[XIII.B.4.a/b] Program Analyst. The Program Analyst, Jennifer Boon, ACC will be responsible for assigning coaching program participants with coaches. She will manage the day-to-day oversight of the coaching portal to ensure client and coach data is accurate and that scheduling and rescheduling functions are effective. As an ACC, Jennifer will manage a portal and methodology for organizing qualitative and quantitative metrics, such as participant satisfaction, session completion and feedback for coaches. Jennifer has extensive experience in managing both individual and group coaching programming. For ACP, she designed, developed, administered, and implemented a customized coaching and client portal managing the progress and registration of over 1,000 coaching clients. This work required Jennifer to oversee the portal, validate participant data and aggregate the data received to identify key areas of concern for coaches to engage on.

[XIII.B.4.a/b] Coaches. SCT coaches facilitate sessions aimed to develop personal and professional goals and strategies for reaching those goals. To mitigate issues around timing and

expectations, SCT offers proven tools such as goal-setting frameworks, coaching agreements, detailed tracking of coaching sessions, and effective virtual facilitation. These tools allow SCT to manage individuals and teams, to track progress, and to ensure that everyone who engages with the developmental opportunity is given a customized—yet consistent—experience.

[XIII.B.4.a/b] Diversity. SCT's vision is to foster a culture that exemplifies and values diversity and provides for a safe, fair, and inclusive workplace where every employee feels like they belong. SCT recruits and contracts a diverse pool of qualified coaches through the ICF's portfolio of coaches. To recommend best practices, SCT has a DEIA Community of Practice (COP). SCT includes an Equal Employment Opportunity statement in our job postings.

[XIII.B.4.a/b] Management Plan. SCT will develop a management plan that addresses how SCT will meet the performance standards, meet deadlines, and manage personnel. The plan will incorporate industry standards for project management and address process management, documentation management, and critical steps and actions to meet requirements.

[XIII.B.4.a/b] SCT will foster planned and controlled projects and effectively monitor tasks using measurable metrics and risk management techniques. SCT will implement policies, procedures, and tools to manage, document, and report progress and outcomes of the work. The management plan will include:

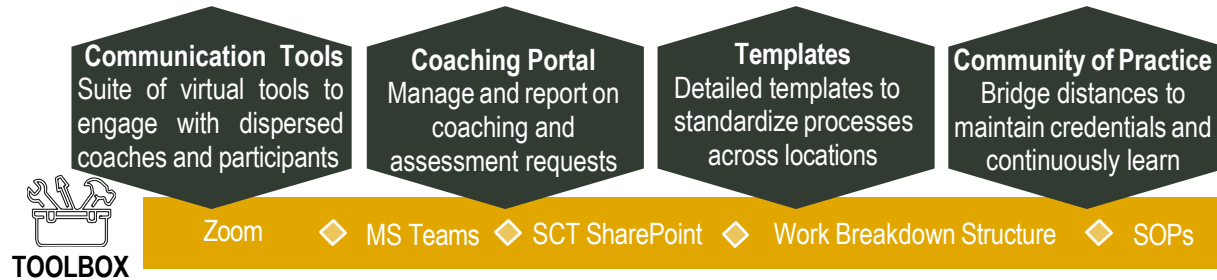
- *Schedule.* A realistic and timely roadmap for achieving project milestones and deliverables. It will include tasks and activities, start and end dates, interdependencies, critical path, milestones, and status meetings for all tasks.
- *Resources.* Identify the owners and contributors for each task and activity. SCT will manage required resources and identify any CWB support required to include documentation, data, and access to leadership and employees.
- *Virtual technology.* Verify the preferred platform for virtual coaching and training sessions. Apply best practices to facilitate virtual workshops and facilitate experiences through use of various tools to create maximum engagement, such as live polling, Mural, in-person chat, and other virtual facilitation exercises.
- *Quality Control Plan.* Comprehensive approach to Quality Assurance (QA) in accordance with the management plan, ensuring deliverables are delivered on time and on budget, all client expectations are met or exceeded, risks are planned for and mitigated, and that we communicate with clients in a timely, clear manner. Responsibility for QA guidance and quality control oversight for this contract will rest with the PM.
- *Project management tools.* Include Gantt charts, tracking and reporting templates, and stakeholder registrar.

[XIII.B.4.a/b] SCT will maintain oversight and management of the project plan and work with leaders and initiative owners to ensure milestones are met within contractual and agreed upon due dates. SCT will inform the CWB leaders of progress and status through meetings, emails, briefings, and status reports.

[XIII.B.4.a/b] Managing a dispersed workforce. Under this contract, SCT will manage coaches located across the country. Our approach to managing remote personnel, shown in Figure 2, involves regular communications using virtual tools and a coaching portal, templates, and

Standard Operating Procedures (SOPs), and engaging coaches through SCT's leadership coaching COP.

Figure 2. SCT's processes and tools enable effective management of dispersed teams.



[XIII.B.4.a/b] Ongoing communications: We are experienced in conducting virtual “face-to-face” meetings. Additionally, we use a team SharePoint portal to communicate and report up-to-date information, review best practices, and share lessons learned. The SCT PM will set expectations and share processes on how the team will interact with the tools available. The PM will define required communications, who needs to be communicated with, how frequently they will communicate, and the intention of the communications. The PM will ensure staff members are skilled in using communication technology.

[XIII.B.4.a/b] We fully understand the power of **effective, timely, and professional communications** in a dispersed environment. We use tools such as Zoom for Government and Microsoft Teams for business to easily connect with staff and have virtual “face-to-face” meetings. We also have significant experience with WebEx, Go-To Meeting, Adobe Connect, and Skype. We are skilled in the pre-planning required to conduct effective virtual meetings, and it will be the leader's and team's responsibility to select the most appropriate technologies for team interactions.

[XIII.B.4.a/b] Coaching portal. To support the administration, management, tracking and availability of the coaching services and more, SCT will provide a virtual platform dedicated to ACP coaching. The platform will be the primary access point for coaching requests, assigning coaches, scheduling sessions, and enabling rapid reporting. The principal “face” of the virtual platform is a fully interactive dashboard. Accessible 24 hours a day, 7 days a week, the platform will directly link all coaching and development support in order to provide a seamless experience, management infrastructure, and data analytics capability. In support of aligning coaches and participants, the portal will include a bio and one-minute video from each coach on their coaching approach. Importantly, the platform is also the site for receiving customer support, whether it be outreach to a coach, a technical issue, or the need to reschedule.

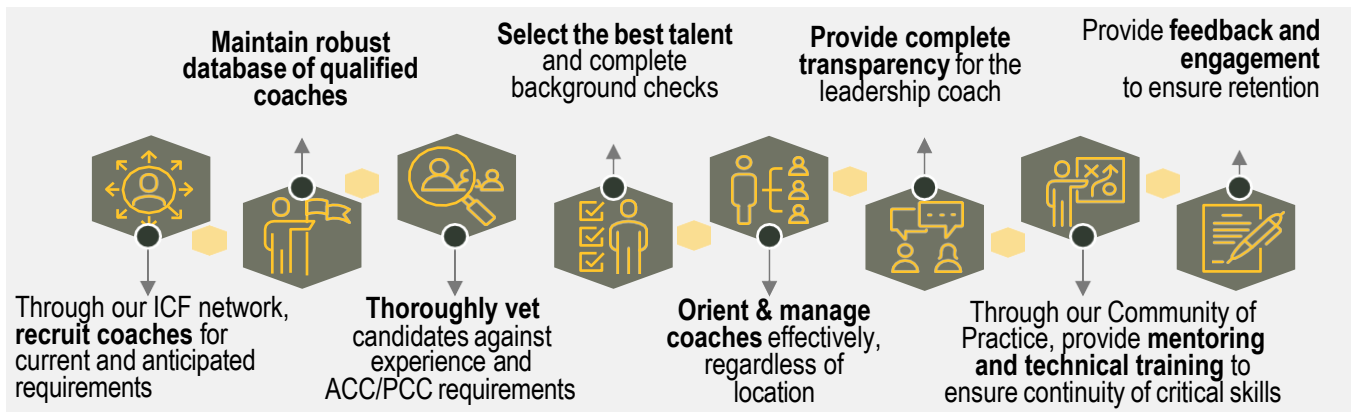
[XIII.B.4.a/b] Templates/SOPs: SCT's experienced leaders will take time to set expectations, focus, create processes on how the dispersed team will interact, and put the appropriate tools in place. They will define communications objectives, recipients, frequency, and intention. The leaders will ensure each staff member is skilled in using communications technology. SCT provides documentation detailing the way we initiate and execute our tasks to team members. This information will also be part of the formal onboarding process and ongoing refresher training as needed.

[XIII.B.4.a/b] COP: SCT carefully curates the learning environment for associated coaches to ensure our leadership development professionals are working in step under high-level organizing principles and methodologies. Geographic distance and previous coaching experience offer tactical value in serving clients of the coaching program; however, we facilitate the community of practice to share best practices, help workload management, develop lessons learned, and otherwise have our coaches working toward common outcomes. Through the COP, we also ensure that coaches are current on both their coaching and assessment certifications.

COACH SELECTION AND ASSIGNMENT PROCESS [XI.2]

[XI.2] Coach Selection. Current SCT employees will fill the PM, Program Analyst, and some of the coaching roles. However, in addition to leveraging current staff to execute the CWB Coaching task, SCT has prepared a recruitment approach for contracting additional independent coaches from the ICF network. Through previous and current coaching contracts, we have identified qualified ACC and PCC coaches to serve in task roles, and should the award be made to SCT, we have the experience to expand that network nationwide. SCT's recruitment approach, Figure 3, includes procedures to enable a rapid phase-in and facilitate staffing sustainment of the ongoing program with minimal disruption. The goal of our recruitment plan is to provide staff with the required skills, certifications, and experience to ensure successful task execution.

Figure 3. Overarching approach to recruitment, hiring, onboarding and retention.



To fill task roles, SCT recruits and vets qualified candidates for all positions to achieve 100% staffing.

SCT understands the sensitivity and complexity of this task and the importance of a high employee retention rate and filling any unexpected vacancies in a timely manner. We focus on employee engagement and continual education. We employ a variety of strategies for engaging employees, including informative corporate orientation, leveraging virtual collaboration tools, establishing clear roles and responsibilities, and facilitating recognition, coaching, continuous learning, and two-way lines of feedback.

In case of a vacancy or surge in requirements, SCT maintains an extensive pool of vetted candidates. SCT has a nationwide cadre of hand-selected and vetted ICF-certified coaches. Coaches who join SCT's bench of coaches are interviewed and assessed, assuring they are (1) rooted in the core ethics and principals of ICF coaching—the gold standard in the profession, (2)

can communicate easily and effectively and, (3) are responsive, thoughtful, and present. This selection process has allowed SCT to develop and maintain its own in-house COP of ICF-certified coaches. On a bi-annual basis, that network of professional coaches, through our Leadership Coaching COP, meets for continued professional development, best-practice sharing, and coach mentorship. Each coach engaged on this contract will be a member of that professional community.

[XI.2] Coach Assignment. SCT will use the following five steps for the coach assignment process.

1. **Support Request Received:** In this first phase, SCT will carefully review the task order request for coaching support, considering, in particular, the number of coaches that will be needed, assessment needs (e.g., 360, EQi-2.0, Hogan, etc.), specific ICF requirements and any notable expertise that would be in service to the task. In this phase, SCT will confirm their understanding of the task with GMU before moving forward.
2. **Coach Bench Reviewed and Recruited:** SCT will leverage its large bench of ICF-certified coaches to recruit from. SCT will consider three “pools” of coaches to pull from. First, our existing coach bench. Comprised of more than 50 ICF-certified coaches at the ACC, PCC, and MCC levels, these are coaches that have worked for SCT previously and are fully vetted in terms of their quality, competence, and professionalism. A second pool are the formal networks SCT has access too. This pool includes coaches SCT may not have worked with yet but can be reached through SCT’s strong connections with the ICF, GMU, and Georgetown University. SCT’s informal pool is represented by those coaches accessible to us through personal connections and referrals.
3. **Individual Coach Reviews.** No matter which “pool” a recruited coach is from, every coach’s resume will be reviewed, an interview will be conducted, and a verification of their credentials will be conducted by our coaching management staff, which will include two ICF MCCs. Coaches found not to meet SCT’s high standards of quality or would meet the demands of the coaching support requested will be removed from the potential coaches list.
4. **Selected Coach Registers for the Task.** If approved by SCT’s reviewers, the coaches will be invited to onboard with SCT for the task through SCT’s customized online platform, where they will provide a written biography, photo, short video biography, assessment certifications and availability to coach. These items will be used as the data available for future clients to review their potential coaches.
5. **Coach and Client are Matched.** As coachees (clients), register for coaching in SCT’s portal, they will be asked to identify the areas they feel they might like to work on and to share any aspects of a coach they may desire (e.g., gender, years of experience, ICF-credential level, etc.). After sharing that information, clients will review the database of coaches available to them and have the opportunity to identify their “top 3” choices. Based on the information provided, each client will then be “hand-matched” by SCT staff with a coach that offered expertise in their area of concern and meets their criteria.

SCT COACHING PHILOSOPHY AND APPROACH

[XIII.B.4.a/b] Executive coaching is a customized experience and process that supports a leader in shaping their ability to accomplish both short- and long-term goals. Our ICF-certified coaches are charged with maintaining confidentiality, broadening the perspectives of their clients, and transforming learning into action (Figure 4). This strategy is accomplished through thoughtful questioning and active listening and results in participants discovering new insights and paths forward. We provide resources, role-play scenarios, tools, pertinent reading, and development activities.

Figure 4. Elements of SCT's successful leadership coaching program.



Confidential.

As the coachee, you deserve a space to be fully authentic. Coaching conversations are strictly confidential.



Applying skills.

Through reflection, we support coachees in applying skills that they already possess but may not be aware of or applying.



Deepening learning

You are creative, resourceful, and whole. Through powerful questions, you may learn new skills and broaden your perspective on the realm of possibilities.



Transforming learning into action.

Design goals, actions and accountability measures that integrate and expand new learning.

[XIII.B.4.a/b] Timing. SCT coaches will meet with each employee in person or by virtual platform with frequency determined by the coaching contract; for example, 1-3 sessions per participant. We will work with each participant to develop schedule sessions and be available for impromptu contact between scheduled sessions to report progress or receive on-the-spot coaching, as needed.

[XIII.B.4.a/b] Coaching Agreement. During the initial coaching session, within one week after the initial meetings, SCT will provide a confidential coaching agreement to be signed by each employee and the coach. The sample Coaching Agreement includes all information about expectations for the coaching session, scheduling, confidentiality, the participant's commitment to the coaching program, and overall outcomes.

[XIII.B.4.a/b] Establishing Goals. Each individual coaching client will use a goal-setting worksheet. This worksheet helps individual clients identify and document goals for their coaching program. Clients are provided a framework to articulate the "how," "who," and "when" of their respective goals, with an emphasis on identifying the metrics that will allow clients to track progress against their goals.

[XIII.B.4.a/b] Coaching Experience. In each meeting with their Leadership Coach, clients are empowered to determine the agenda for their engagement. SCT coaches are trained to actively listen, create space for the client to share deeply, and ask questions that inspire the client to see new solutions. They are engaging, thoughtful, and artful at facilitating conversations to enable leaders to see new possibilities and overcome barriers. SCT coaches pride themselves on powerful questioning, authentic listening, and client accountability. They remain focused on broadening the perspective of their clients, connecting the difficult work of leadership to their personal values and leadership character. Clients are invited to identify, explore, and develop actionable plans to improve organizational effectiveness.

ACCURATE, DETAILED, AND TIMELY MONTHLY REPORTING OF COACHING PROGRESS**[XI.2]**

[XI.2] SCT promotes monthly reviews of task performance with the client's program leaders, as appropriate, to discuss progress against the project schedule, any performance issues, identified risks and mitigation progress, project administration issues, and overall project status. The PM will submit Monthly Coaching Reports (MCRs) each month that include the following:

- Reporting period accomplishments, problems and issues, and recommendations for corrections;
- Lists of personnel signed up for coaching engagement; currently enrolled in engagement; and completed engagement;
- List of personnel undertaking the assessment debrief and list of personnel who completed the assessment debrief; and
- Summary of the program registration, coaching updates, coaching hours completed, and unexcused absences.

These status reports will provide an additional mechanism for ensuring that the project is progressing as required to achieve project objectives and meet or exceed all expectations.

MONTHLY COACHING REPORT [XI.2]

[XI.2] Please see SCT's example monthly coaching report in Appendix D.



4. PROPOSED PRICING [XIII.B.5]

[XIII.B.5.a.ii Proposed Pricing: Coaching Vendor Administration for Executive Education Programs hourly rate] Table 2 lists SCT's hourly rates for all years included in the GMU-1836-23 solicitation. We propose 4 labor categories to cover all administrative and coaching roles. All travel-related expenses and overhead costs are included in these proposed rates. The period of performance (IX) is (1) year from effective date of contract with four (4) successive one-year renewal options (or as negotiated). We have discounted our coaching rates five percent from our GMU BPA rates.

Table 2. SCT's proposed pricing for GMU-1836-23.

#	SCT Labor Category	Hourly Rate				
		Base Year	Option Years			
		Year 1	Year 2	Year 3	Year 4	Year 5
1	Program Manager	\$ 154.00	\$ 157.85	\$ 161.80	\$ 165.84	\$ 169.99
2	Executive Coach (ICF PCC)	\$ 248.19	\$ 254.39	\$ 260.75	\$ 267.27	\$ 273.96
3	Leadership Coach (ICF ACC)	\$ 221.11	\$ 226.64	\$ 232.30	\$ 238.11	\$ 244.06
4	Program Analyst	\$ 129.50	\$ 132.74	\$ 136.06	\$ 139.46	\$ 142.94

5. MISCELLANEOUS [XIII.B.6]

[XIII.B.6 In your proposal response please address the following]

- Are you and/or your subcontractor currently involved in litigation with any party? No.
- 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. None.
- Please list all lawsuits that involved your firm or any subcontractor in the last three years. None.
- In the past ten (10) years, has your firm's name changed? No.

6. PAYMENT PREFERENCE [XIII.B.1.D]

[XIII.B.1.d State your payment preference] SCT's payment preference is Option #3 - Net 30 Payment Terms. SCT is already enrolled in Paymode-X for all payments to be made. Lisa Wax, SCT's Chief Operating Officer, is responsible for managing invoices and payments.



July 6, 2023 | GMU-1836-23
GMU Leadership Coaching & Development Services
SCT Proposal

7. APPENDIX A: SMALL BUSINESS SUBCONTRACTING PLAN [XIII.B.1.B]

[XIII.B.1.b Return Attachment A - Small Business Subcontracting Plan]

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: Strategy Consulting Team LCC

Preparer Name: Lisa Wax **Date:** June 15, 2023

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: 717336 Certification Date: July 30, 2019

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: _____



8. APPENDIX B: ATTACHMENT C – RFP ROLE SELECTION [XIII.B.1.C]

[XIII.B.1.c Return Attachment C - RFP Role Selection]

Offeror: Strategy Consulting Team (SCT)

**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:

Adam Schmidt, Proposed Program Manager:
ICF Master Certified Coach (MCC) accreditation
ICF Advanced Certification in Team Coaching (ACTC)

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

Adam Schmidt, PCC Markets Training, March 11, 2020

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.

Adam Schmidt, MCC, ACTC has been on the Faculty at George Mason University since 2021 primarily in the roles of Learning Lab Advisor (all modules), PCC Marker Assessor and various module support activities (e.g. observation coach or "competency round robin" lead). In that work, Adam has designed, developed and delivered several cohorts of learning labs with exceptional. Adam's grounded and hands-on approach to teaching the ICF competencies, leveraging digital whiteboards, polling and team exercises, have earned excellent feedback.

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

The MCC logo is displayed in large, bold, orange and yellow letters on a dark blue background. The letters 'M' and 'C' are orange, and the 'C' and 'C' are yellow.

ICF Credentials and Standards

is honored to confer upon

Adam Schmidt

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: 5/25/2022

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Boris Dobis, ACC
Chair
2022 /CF Credentials and
Standards Global Board

A handwritten signature in black ink, appearing to read 'Magdalena Mook', is positioned above a horizontal line.

Magdalena Mook
Executive Director
International Coaching Federation



Valid through: 5/31/2025

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Awarded on this day: 5/26/2017

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Chair
2022 /CF Credentials and
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Executive Director
International Coaching Federation



**Credential
and Standards**

Valid through: 5/24/2022



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Awarded on this day: 3/10/2023

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Magdalena Mook
Executive Director
International Coaching Federation



Credential
and Standards

Valid through: 3/31/2026



PCC Markers Certificate

is hereby awarded to

Adam Schmidt

This Certificate documents full attendance at

Cohort 17 of the PCC Markers Training

And satisfied the ICF requirements for

33 Core Competency CCEs

March 11, 2020



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



9. APPENDIX C: SIGNED ADDENDA [XIII.B.1.A]

[XIII.B.1.a Return all addenda, if any, signed and completed as required]



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

Strategy Consulting Team (SCT)

Name of Offeror/Firm

Philip Baylor

NAME (Print or typed)

Philip Baylor

Signature

June 26, 2023

Date



10. APPENDIX D: SCT MONTHLY COACHING REPORT [XI.2]



Monthly Status Report: Army Coaching Program
Period Covered: May 1 – May 30, 2023

Functional and Performance Activities, Accomplishments, Problems, Issues and Recommendations	PWS Section
<ul style="list-style-type: none"> • Functional and Performance Activities <ul style="list-style-type: none"> ○ SCT updated and further developed the portal for coachee registration, customized with Army provided colors and look ○ SCT is registering and onboarding select ICF Certified coaches to expand the coaching bench to meet and exceed the needs of the ACP. ○ SCT identified all metrics that will be required on forthcoming MSR's ○ SCT requested post-satisfaction survey legacy info from ACP • Accomplishments <ul style="list-style-type: none"> ○ SCT and ACP identified 5/15 for an in-person kickoff ○ SCT developed and documented the likely "flow" for the ACP, capturing both the automated and manual processes that will need to take place for each coach and coachee ○ SCT customized the MSR IAW with guidance from ACP team • Problems and Issues <ul style="list-style-type: none"> ○ None at this time. • Recommendations <ul style="list-style-type: none"> ○ None at this time. 	5.5.1

Contract: GSA schedule 000000000000

Task Order: 00000000000000

Date: May 1, 2023



Monthly Status Report: Army Coaching Program
Period Covered: May 1 – May 30, 2023

List of Personnel Signed up for Coaching and Complete with Coaching	PWS Section
Coaching Only <ul style="list-style-type: none"> • See Appendix A to this MSR Coaching with Assessment <ul style="list-style-type: none"> • See Appendix A to this MSR Complete Coaching <ul style="list-style-type: none"> • See Appendix A to this MSR 	5.5.2
List of Personnel Currently Taking the Assessment	PWS Section
Currently Taking the Assessment <ul style="list-style-type: none"> • See Appendix B to this MSR Completed the Assessment <ul style="list-style-type: none"> • See Appendix B to this MSR 	5.5.3
Assessment Debrief	PWS Section
List of personnel undertaking the assessment debrief <ul style="list-style-type: none"> • See Appendix C to this report List of personnel who have completed the assessment debrief <ul style="list-style-type: none"> • See Appendix C to this report 	5.5.5

Contract: GSA schedule 000000000000

Task Order: 00000000000000

Date: May 1, 2023



Monthly Status Report: Army Coaching Program
Period Covered: May 1 – May 30, 2023

Action Plans	PWS Section
List of action plans created as a result of coaching <ul style="list-style-type: none">None at this time. List of action plans created if services fail to meet the performance standard <ul style="list-style-type: none">None at this time.	5.5.4

Contract: GSA schedule 000000000000

Task Order: 00000000000000

Date: May 1, 2023



Monthly Status Report: Army Coaching Program
Period Covered: May 1 – May 30, 2023

Program Summary	PWS Section
<p>Summary of the program registration, coaching updates, coaching hours completed, and</p> <ul style="list-style-type: none"> • Number of newly registered participants (by program and cohort): <ul style="list-style-type: none"> ○ BCAP: 0 ○ CCAP: 0 ○ ALAP: 0 ○ DCHAP: 0 ○ MCAP: 0 ○ SMAP: 0 • Number of Post-Coaching Satisfaction Surveys completed: 0 • Thematic Coaching updates: None at this time. • Number of Coaching hours complete: 0 • Number of Coaching hours remaining: 990 Hours for the Junior Coaching element • Additional Coaching Hours Requested: 0 • Number of unexcused absences: 0 	<p>5.5.6</p>

Contract: GSA schedule 000000000000

Task Order: 00000000000000

Date: May 1, 2023



Monthly Status Report: Army Coaching Program
Period Covered: May 1 – May 30, 2023

Appendix A: Personnel Signed Up and Complete with the ACP

Coaching Only: 4 Participants

Count	First Name	Last Name	Rank	Program	Cohort
1	Johnny	Sample	CPT	30 under 30	14
2	Jane	Example	LTC	BCAP	12
3	Mike	Illustrative	LTC	BCAP	13
4	Another	Line	COL	CCAP	3

Coaching with Assessment: 4 Participants

Count	First Name	Last Name	Rank	Program	Cohort
1	Johnny	Sample	CPT	30 under 30	14
2	Jane	Example	LTC	BCAP	12
3	Mike	Illustrative	LTC	BCAP	13
4	Another	Line	COL	CCAP	3

Completed the Coaching Program: 4 Participants

Count	First Name	Last Name	Rank	Program	Cohort
1	Johnny	Sample	CPT	30 under 30	14
2	Jane	Example	LTC	BCAP	12
3	Mike	Illustrative	LTC	BCAP	13
4	Another	Line	COL	CCAP	3

Contract: GSA schedule 000000000000

Task Order: 00000000000000

Date: May 1, 2023



Monthly Status Report: Army Coaching Program
Period Covered: May 1 – May 30, 2023

Appendix B: Assessments

Currently Taking the Assessment: 4

Count	First Name	Last Name	Rank	Program	Cohort
1	Johnny	Sample	CPT	30 under 30	14
2	Jane	Example	LTC	BCAP	12
3	Mike	Illustrative	LTC	BCAP	13
4	Another	Line	COL	CCAP	3

Complete with Assessment: 4

Count	First Name	Last Name	Rank	Program	Cohort
1	Johnny	Sample	CPT	30 under 30	14
2	Jane	Example	LTC	BCAP	12
3	Mike	Illustrative	LTC	BCAP	13
4	Another	Line	COL	CCAP	3

Contract: GSA schedule 000000000000

Task Order: 00000000000000

Date: May 1, 2023



Monthly Status Report: Army Coaching Program
Period Covered: May 1 – May 30, 2023

Appendix C: Assessment D

Currently Taking the Assessment: 4

Count	First Name	Last Name	Rank	Program	Cohort
1	Johnny	Sample	CPT	30 under 30	14
2	Jane	Example	LTC	BCAP	12
3	Mike	Illustrative	LTC	BCAP	13
4	Another	Line	COL	CCAP	3

Complete with Assessment: 4

Count	First Name	Last Name	Rank	Program	Cohort
1	Johnny	Sample	CPT	30 under 30	14
2	Jane	Example	LTC	BCAP	12
3	Mike	Illustrative	LTC	BCAP	13
4	Another	Line	COL	CCAP	3

Contract: GSA schedule 000000000000

Task Order: 00000000000000

Date: May 1, 2023



11. APPENDIX E: GLOSSARY OF ABBREVIATIONS

Abbreviation	Definition
AAW	Army Acquisition Workforce
ACP	Army Coaching Program
ANC	Arlington National Cemetery
COP	Community of Practice
CWB	Center for the Advancement of Well-Being
DEIA	Diversity, Equity, Inclusion, and Accessibility
DOC	Department of Commerce
DSBSD	Virginia Department of Small Business and Supplier Diversity
HCSP	Human Capital Strategic Plan
HRS	Human Resources Solution
ICF	International Coaching Federation
IDIQ	Indefinite Delivery, Indefinite Quantity
MCC	Master Certified Coaching
NIFA	National Institute of Food and Agriculture
PCC	Professional Certified Coach
PLS	Personnel Life-Cycle Solutions
PM	Program Manager
PMP	Project Management Professional
QA	Quality Assurance
SCT	Strategy Consulting Team
SEC	Securities and Exchange Commission
SOP	Standard Operating Procedures
SWaM	Small, Women-owned, and Minority-owned



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And satisfied the ICF requirements for

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