

## ITN-2019-00013 SCOPE OF WORK

Various administrative and academic area of Florida International University need support for their strategic and operational priorities, goals, and objectives through Organizational Development/Consulting and/or Executive Coaching. Services provided by vendors will augment support for leadership from existing Human Resource staff and programming.

Our expectation is that any vendor, who would like to work with FIU, will have an established service platform that will include the following:

### **DESCRIPTION OF SERVICES**

#### **EXECUTIVE COACHING**

Executive Coaching services will be available for all leaders for a flat fee per coaching assignment, as needed or requested. Vendors are encouraged to offer additional ad hoc ancillary coaching services in their proposal in order to distinguish themselves from other vendors.

Executive Coaching services are intended to do the following leverage an individual leader's strengths and maximize that of their team; strengthen the leader's influence and impact; enhance cross-functional partnering, transparency, and effectiveness; understand core strengths and identify areas of opportunity for improvement; create and facilitate coaching and development plans for each leader's development.

These services much include:

- **Introductory & Pre-planning Meeting.** Each vendor must conduct two (2) introductory meetings, at no additional cost, with the leader requesting services and the participant. The purpose of the meetings are to share reasons for coaching assignment, discuss coaching objectives and expectations for results, as well as to confirm suitability of the Coach.
- **Assessments.** Vendor must provide a variety of assessment tools and resources used for diagnostic, feedback and coaching purposes. Examples of assessment tools we would expect are 360-degree feedback, analyses of psychological preferences such as Myers-Briggs, Emotional Intelligence (EI) assessments for coaching related to dimensions of awareness and impact on others, as well as other assessments such as DISC or StrengthsFinder. We expect that the vendor will provide and initiate access for these assessments, at no additional charge.
- **Minimum Coaching Assignment Services.** Vendor must provide one-on-one executive coaching services to a leader for a minimum of 12 months, per assignment. We would like to have the option to extend those coaching services on a month-by-month basis, as needed or requested. During the course of the 12-month coaching assignment, we expect the following:
  - **Off-Site Coaching Introduction.** Vendor must provide a dedicated, uninterrupted structure and timeframe with coaching client for the start of the coaching relationship. Coaching is a personal relationship that starts with two individuals who are not familiar with each other. We expect that the start of that relationship will take place off-site, outside of the work environment so that the Executive Coach has the participant's undivided attention and the participant is able to fully engage in the beginning of the coaching experience. This meeting will include discussion of topics such as the participant's career goals, perceived strengths and areas for improvement, as well as discussion of assessment analysis and feedback, if applicable.
  - **Coaching/Development Plan.** The introductory meetings, assessments and off-site coaching introduction will result in a customized coaching plan to support the individual leader and help achieve development goals, discussed with the participant in full detail.

- **Coaching to Plan.** Coaching will occur via face-to-face, one-on-one meetings that will occur a minimum of once per month, and coaching calls a minimum of once per month. The participant should have access to their coach, via email or phone, in between coaching sessions and/or calls for inquiries and/or questions.
- **Status Updates.** Vendor must provide quarterly status/progress updates related to coaching plan and/or development goals to the executive leader. Updates expected to be provided during in-person meetings and/or via conference/skype calls.
- **Close Out and/or Extension.** Vendor must provide final report related to progress on established coaching plan and/or development goals. Creation and delivery of said report should be provided along with a summary of achievements should be provided upon completion of the coaching assignment period. Vendor will also share their recommendations for next steps and/or extension of coaching assignment, etc.

### **STRATEGY DEVELOPMENT/ALIGNMENT**

Strategic planning including initial assessment, delivery of data and recommendations in assessment summary, and an organizational plan to address concerns, observations, etc. A comprehensive strategy plan may include discussions around

- Developing Effective Team Dynamics
- Value Integration
- Implementing a Model of Accountability & Results
- Design and Implementation of Scorecards & Measures of Results

### **ORGANIZATIONAL CULTURE ASSESSMENT & ALIGNMENT**

Assessment of culture to identify existing cultural norms, behaviors and results

- Assessment of organizational space, offices, workspaces, buildings, use of wall space, etc.
- Assessment of organizational behavior (interactions, meetings, decision-making, etc.)
- Interviews with staff and leadership
- Facilitation of organizational culture surveys

Data Analysis and Results Feedback

- Share organization's Culture IQ
- Identify barriers to desired organizational culture
- Present assessment report/results and recommendations

Strategy Development, Alignment and Implementation plan

- Develop strategy for communication, implementation and assessment of aligned culture
- Establish and share principles, values, and methods/processes through which this comes alive

### **MISSION & VISION WORK**

Provide framework for administrative and academic leaders to establish or further develop Vision and Mission that align with the leader's values and purpose.

The vendor will engage in an introductory meeting with senior/executive leadership to discuss unit and specific needs. The vendor will then facilitate a two-day work session with selected leaders of organization/unit. Deliverables from this work will include the following:

- Mastery of Vision and Mission and their role

- Design/develop personal/organizational Vision and Mission Statements
- Develop Organizational Shared Values set
- Design and employ strategies for moving through obstacles
- Develop a communications plan for sharing of outcomes with extended organization

### **LEADERSHIP RETREAT PLANNING, DEVELOPMENT & FACILITATION**

Provide a framework and plan for creating a clear path, enhance organizational climate and create greater employee engagement. The strategic planning, design and facilitation of a retreat may include:

- Meeting with leadership to identify and communicate purpose and intended result of retreat
- Development of a plan to connect the organization's mission to organizational processes and employee behaviors
- Design of a detailed agenda which will include overall theme of retreat and existing salient issues, including a proposed list of participants
- Selection of an appropriate retreat site
- Design, communication and gathering of any applicable pre-work assessments, interviews, etc.
- Finalizing and communicating retreat expectations
- Preparing executive leader for retreat 's activities and results

### **LEADERSHIP DEVELOPMENT CONTENT DESIGN & FACILITATION**

The vendor will provide services to augment and support existing professional and/or leadership development of the organization/unit/team, based on discussions and feedback from HR representative/source. Leadership and supervisory development to strengthen and hone the following competencies:

- Relationship Agility
- Change Management
- Emotional Intelligence
- Conflict Management & Resolution
- Performance Coaching & Management
- Effective Communication and Collaboration
- Efficient and Effective Work Processes and Protocols

Areas of improvement and learning priorities will be identified and communicated to ensure delivery of appropriate and relevant content to organization. Vendor is expected and encouraged to make recommendations for updating and/or revision of content based on feedback and/or observations from organization.

### **TRAIN-THE-TRAINER SERVICES**

The vendor will provide subject matter experts and seasoned/certified facilitators to train employees on use of training material for the benefit of the organization.

Vendor will include the following as a part of this service:

- Reference tools and resources
- Access to designated staff for any design and delivery questions and/or concerns
- Invitations to "refresh" and attend additional training enrichment activities
- Notifications or information related to ongoing learning opportunities to sharpen training skills and ensure long-term success of the organization