



Request for Information (RFI)

Services Required:	Coaching Services
Type of Procurement:	Open Bid
Term of Contract:	5 Years
End User:	RTI International (RTI International is a trade name of Research Triangle Institute)
This Procurement Supports:	Organizational Development and Learning (ODL)
Submit Proposal to:	Carol Kozar Director – Strategic Sourcing RTI International 800 Park Offices Drive PO Box 12194 3040 Cornwallis Road Research Triangle Park, NC 27709 ckozar@rti.org
Date of Issue of RFI:	Date: Sept 9, 2009
Date Questions Due:	Date: By 12:00 Noon on Sept 14, 2009 (email only to ckozar@rti.org)
Date Proposal Due:	Time: By 12:00 Noon EDT Sept 21, 2009
Method of Submittal:	Response should include one (1) signed original, three (3) additional copies, and one (1) CD/DVD of RFI Response package mailed to above address
Solicitation Number:	MS FY09 033
Attachments To RFI: All bidders are responsible to carefully review each attachment and follow any instructions that may be relevant to this procurement.	Attachment “B” – Instruction to Bidders Attachment “C” – Statement of Work/Technical Specifications Attachment “D” – Organizational References Attachment “E” – RTI Competency Model

Attachment “B” Instruction to Bidders

RTI International (RTI) seeks information on Coaching Services as described in this Request for Information (RFI). Proposal submission shall be made in accordance with the instructions outlined in this attachment. Bidders shall submit four (4) hard copies of your completed proposal (1 original and 3 copies) plus 1 CD/DVD to Carol Kozar, Director Strategic Sourcing, no later than 12:00 Noon Eastern Daylight Time (EDT) on Sept 21, 2009 at RTI International, Research Triangle Park, North Carolina. Proposals submitted not in accordance with the RFI Instructions contained herein will be considered non-responsive and will be rejected by RTI.

Any questions concerning the RFI should be addressed to RTI’s Procurement Director, Carol Kozar, by email at ckozar@RTI.org by no later than 12:00 Noon EDT on Sept 14, 2009; phone inquiries will not be entertained. Bidders have the discretion to submit hard copies via mail or express courier but must ensure that their proposals are received by the deadline. RTI will not make exceptions for any delay. Late proposals will not be considered. Bidders must submit the offer in accordance with the instructions contained herein.

This document provides ample information for contractors to decide whether they’re willing to participate in this selection process. It will enable the contractors to provide sufficient information for RTI to select a shortlist of contractors to which a Request for Proposal (RFP) may be issued. **Contractors do not need to prepare detailed proposals at this stage.** Contractors should provide basic information regarding capabilities and an indication as to how they would approach working with RTI to achieve the described.

Details

RTI understands that an integral part of the organization’s success depends on an effective leadership team to drive exceptional performance. Therefore, in 2009, RTI plans to expand the pool of leadership coaches. The contracted companies will provide RTI with experienced and expert leadership coaches who are knowledgeable about the critical skills required for successful leadership development to ensure more effective action and greater business success. The contracted companies will have an understanding of RTI’s core business and the challenges that confront its managers and staff.

Details are provided in the Attachment C Statement of Work/Technical Specifications. Offers submitted in response to this RFI shall provide clear, complete, concise, and straightforward responses to the evaluation factors. Elaborate proposals, color brochures and other excesses are discouraged. Information submitted about any company other than the Bidder, whether an affiliated company, contractor, or other associated business, may not be given much weight unless the proposal contains evidence that the Bidder has obtained a commitment from this other business entity to perform a portion of the work.

Based on responses to the RFI, a Request for Proposal (RFP) may be issued to a shortlist of contractors, tentatively planned for **October 9, 2009** which will contain more detailed requirements for the services required, contractual details, and key criteria for successful bidders. Upon review of the RFP, a shortlist of possible contractors may be selected and asked to interview and/or present demonstrations of their offerings. We are currently planning to review these demonstrations on **November 6 (am) and/or November 12 (am), 2009.**

General Instructions:

Proposals received that conform to the proposal instructions will be evaluated. The following criteria will be used in evaluating supplier responses:

- Experience and qualifications in coaching;
- Experience with validated assessment tools and alignment to the RTI Competency Model (See Attachment E);
- Knowledge and/or ability to understand (demonstrated by previous experience) of RTI business and culture;
- Ability to follow instructions relative to the RFI.

Attachment “C”

Statement of Work/Technical Specifications/Information To Be Submitted with Bid

Overview

RTI requires the services of qualified contractors to provide leadership coaching services for Executives, high potential employees and emerging leaders. RTI is committed to ensuring that the company has the type of leadership required to enter into increasingly effective, productive and beneficial relationships with its staff and clients.

Proposal submission should include a description of the Contractor’s approach/philosophy to coaching, compliance standards, as well as the products/services being offered. Coaches will be required to maintain professional boundaries in the coaching relationship, including confidentiality (a Confidentiality Disclosure Agreement must be on file), and adheres to the coaching profession code of ethics.

RTI’s Organizational, Learning and Development (ODL) group has responsibility to oversee leadership coaching for Executives, high potential employees, emerging leaders and individual growth or developmental coaching on a select basis. Since the above-mentioned services are essential to the implementation of change, the ongoing enhancement of partnership and leadership skills, and the maintenance of a competent organization, it is RTI’s intention to establish five-year Master Services Agreements (MSA’s) with qualified contractors for the provision of these services. The coaching shall be performed at an RTI location, by telephone and or a meeting site determined by both.

RTI

RTI is an independent, nonprofit organization with a distinguished history in scientific research and technology development with over 3500 employees (approximately 2600 domestically and 1000 internationally) working in more than 30 countries. The mission of the organization guides all activities: *To improve the human condition by turning knowledge into practice.* RTI provides project management services to clients in government, industry, academia, and public service throughout the United States and abroad with approximately 85% of its work being federally funded contracts and the other 15% being commercially funded projects.

Headquarters are located in Research Triangle Park, NC with satellite offices throughout the United States and overseas. Regional offices include:

- Atlanta, GA;
- Chicago, IL;
- Rockville, MD;
- San Francisco, CA;
- Waltham, MA;
- Washington, DC.

International offices include:

- Dubai, United Arab Emirates;
- Manchester, United Kingdom;
- San Salvador, El Salvador;
- Jakarta, Indonesia;
- Pretoria, South Africa.

Coaching Services Objectives:

- Provide RTI with experienced and expert leadership coaches who are knowledgeable about the critical skills required for effective and sustainable leadership development.
- Provide sustainable leadership coaching services for Executives, high potentials and emerging leaders.
- Establish a professional partnership between a qualified coach and an individual that supports the achievement of extraordinary results, based on goals and a timeline set by the coachee and coachee's sponsor with executive approval.
- Focus on the skills, behaviors and actions needed to successfully produce the relevant results within the agreed upon timeline.

Future Coaching requirements would include, but not be limited to, the following:

- Analyze and develop coaching solutions to diagnose complex problems and key issues;
- Develop clearly defined coaching plans with concrete outcomes as requested;
- Alignment of coaching plans to sponsoring executive's strategic objectives, coachee goals, and RTI's competencies and values (see attached competencies and values);
- Develop S.M.A.R.T. (Specific, Measurable, Attainable, Results, Time-Sensitive) Goals with the coachee and approved by the sponsoring executive;
- Define how you assess the competencies that need developing ;
- Use appropriate validated behavioral change instruments to measure and evaluate targeted behaviors (determine if change has occurred);
- Use RTI customized 360 assessment tool for all 360 instruments;
- Articulate the closure of the coaching process within the plan and your solution(s) to end each assignment;
- Assess coachee progress (timeline and goals) using data to guide and modify the coaching plan in conjunction with coachee and approved by the sponsoring executive;
- Help coachee coordinate the actions and output of all organizational learning processes as requested;
- Create lasting breakthroughs that make a difference;
- Respond to RTI Quarterly and Annual Reporting on Metrics that demonstrate measurable business impact.

Proposal Submission should include the following:

- Complete questionnaire and provide a copy of response;
Questionnaire Link and Instructions:
<http://thinktank4.groupsystems.com/opinio/s?s=802>
- Submit three samples of coaching plans aligned to strategic objectives competencies and coachee goals;
- Submit three samples of metrics used to measure outcomes;
- Submit three organizational references detailing your success with coaching in those organizations (See Attachment D: Organizational References).

Attachment "D"

ORGANIZATIONAL REFERENCES

Please type in the information, save the document, print and submit a copy of this document along with the three references.

1. Name of Organization: _____
What year was coaching work performed? _____
Contact Information of Coachee Executive Sponsor:
Name: _____
Title: _____
Phone: _____
Email: _____

Attach Reference Letter

2. Name of Organization: _____
What year was coaching work performed? _____
Contact Information of Coachee Executive Sponsor:
Name: _____
Title: _____
Phone: _____
Email: _____

Attach Reference Letter

3. Name of Organization: _____
What year was coaching work performed? _____
Contact Information of Coachee Executive Sponsor:
Name: _____
Title: _____
Phone: _____
Email: _____

Attach Reference Letter