

Executive Coaching

Request for Proposal – Questions & Answers

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Orange County Employees Retirement System (OCERS)

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Questions Submitted:

Question 1

Does OCERS use coaching today? Is there an existing process to align to?

Answer 1

Currently, the OCERS agency does not use coaching services. No, there is not an existing process that the firm may align to.

Question 2

Will there be a handover & implementation phase we need to consider? Is there a set timeframe for this?

Answer 2

No, there will not be a handover and implementation phase to consider. Also, there is not a set timeframe.

Question 3

What would success look like? How do you currently measure the impact?

Answer 3

Success would be indicated when the key objectives are met. OCERS is seeking to maximize the following:

- a. Team Strengths
- b. Awareness of individual and collective challenges, blind spots, and gaps in performance
- c. Behavioral attributes
- d. Communication, engagement, and influence
- e. Efficiency and efficacy

Currently, OCERS does not measure these impacts.

Question 4

Have the leaders been coached before? Individually and/or as a team?

Answer 4

Yes, some members of the Senior Executive Team have participated in individual and/or team coaching services.

Question 5

How long has the team been intact and working together?

Answer 5

The Senior Executive Team have worked together for about four (4) consecutive years.

Question 6

The RFP states that a firm “may be asked to provide services onsite, remotely, or a combination of both.” Would the OCERS accept the virtual platforms of Zoom or Microsoft Teams?

Answer 6

The OCERS agency will accept the virtual platforms of Zoom and Microsoft Teams. However, Zoom is the preferred platform of use.

Question 7

Section 3 describes the format for coaching as onsite, remote or a combination of both.

- a. We have many coaches outside Orange County and much of our coaching is conducted via phone or virtual platform. Are in-person coaching sessions a requirement for this project?
- b. Due to COVID-19 and the health and safety of our clients and employees, we are only meeting remotely and not offering any in-person sessions until July, 2021 at the earliest. This may be extended through the end of 2021. Would this preclude us from being awarded a contract?

Answer 7

- a. No, in-person coaching sessions are not required.
- b. No, this will not preclude the firm from being awarded a contract.

Question 8

When travel becomes safe again, how many in-person coaching sessions does OCERS envision?

Answer 8

Due to the current health crisis, the OCERS agency does not anticipate in-person coaching sessions will take place through the end of 2021. However, when the appropriate authorities have deemed it safe, the total number of sessions (in-person or virtual) will be determined by mutual agreement of the parties.

Question 9

What frequency is envisioned for the individual and group coaching sessions?

Answer 9

The OCERS agency would like the selected firm to recommend and present various options (light to comprehensive) so that the Senior Executive Team (as individuals and as a group) may choose the intensity level that works best for them.

Question 10

Could the OCERS clarify what members of the OCERS team are to be coached?

Answer 10

There are five (5) members of the Senior Executive Team that will receive coaching services. The Senior Executive Team consists of:

- a. Chief Executive Officer (CEO)
- b. Chief Investment Officer (CIO)
- c. General Counsel
- d. Assistant Chief Executive Officer – Internal Operations and Finance
- e. Assistant Chief Executive Officer – External Operations

Question 11

Is the OCERS envisioning “Team Building” Services to follow this executive coaching contract?

Answer 11

No, at this time, the OCERS agency does not envision “Team Building” services to follow the executive coaching contract.

Question 12

What was the impetus for the request for executive coaching services?

Answer 12

The Senior Executive Team is seeking to enhance their work as an individual and as a collaborative team. This team oversees a \$20 billion agency. Additionally, as outlined in OCERS Strategic Plan, the agency seeks to Cultivate a Collaborative and Inclusive Culture and Continuously Improve Business Processes and Procedures to be Efficient and Effective.

Question 13

What are the objectives and key outcomes that OCERS is seeking to constitute program success?

Answer 13

The OCERS agency is seeking key outcomes with clear terminal and enabling objectives set by the firm to maximize the following:

- a. Team Strengths
- b. Awareness of individual and collective challenges, blind spots, and gaps in performance
- c. Behavioral attributes
- d. Communication, engagement, and influence
- e. Efficiency and efficacy

Question 14

Do the proposal requirements outlined in Section 7 need to be provided in a proposal in the order they are listed in the RFP, or can a response vary in order with all the information requested?

Answer 14

The OCERS agency prefers that the responses to Section 7 align with the order listed in the proposal. However, alignment of the questions is not required.

Question 15

Does the OCERS have a ceiling price for this project, and if so, could that information be shared?

Answer 15

The maximum budget for this project is not to exceed \$100,000.00. This will include all materials, licensing fees, and travel expenses (if any). Please be competitive in your pricing as this is a primary consideration in our evaluation process.

Question 16

What kind of organizational chart should be included in a response? Would leadership suffice or would staff have to be included as well? We have several staff members that only work on one contract, so should they be included as well?

Answer 16

The firm shall provide a complete organizational chart and an organizational chart that clearly show the reporting structure of all fully trained and qualified staff that will be assigned to the OCERS agency.

Question 17

Is OCERS currently working with a consulting or coaching firm?

Answer 17

No, the OCERS agency is not currently working with a consulting or coaching firm.

Question 18

Section 3, item 1 outlines the use of a comprehensive assessment. Does OCERS currently use any assessments or have a specific assessment in mind?

Answer 18

No, the OCERS agency is not currently using an assessment and does not have an assessment in mind.

Question 19

Section 3 explains the desire for collaboration “for delivery of coaching and training sessions”.

- a. Is there specific training that OCERS is interested in or is it your belief that the need for specific topics will be an outcome of the coaching sessions?
- b. Is the training intended for the Executive Team or for all 90 employees?
- c. If training is included in this proposal, can you provide additional details?

Answer 19

- a. OCERS is not interested in specific training. Outcomes of the coaching will include recommended training sessions for the Senior Executive Team either individually or collectively as determined appropriate.
- b. Any training recommended would be initially intended for OCERS Senior Executive Team and not all OCERS employees.
- c. No, specific training is not included in this proposal. Please refer to 19.a.

Question 20

Section 3, item 2 refers to a guide which includes “a succession plan to support individual and Executive Team goals”. Can you explain what is meant by a succession plan in this context? Is an outcome of coaching intended to identify successors for the Executive Team or the CEO?

Answer 20

The OCERS agency would like the selected firm to recommend a succession plan that will support the Senior Executive Team’s success following the conclusion of the coaching services. The plan should align with established individual and team goals. No, a coaching outcome is not to identify a successor for the Senior Executive Team or CEO.

Question 21

Section 3, item 5 ensures alignment of Coach to Executive. Does OCERS envision that one individual will coach all members of the Executive Team or are executives able to select different coaches from the same firm? If multiple coaches are selected, how is a coach selected for group coaching sessions?

Answer 21

The OCERS agency envisions that the selected firm will go through a matching exercise to find a coach that is a good match for each individual. Based on the matching exercise, OCERS envisions the firm making a recommendation for a group coach.

Question 22

Section 3, item 7 requests the ability to meet with Senior Executives, Manager of LOD, and Director of Human Resources. Are you interested in a specific number of status meetings with this group over the course of the year or is this on an ad hoc basis?

Answer 22

The OCERS agency has not determined the total number of status meetings or if the meetings should be on an ad hoc basis. This will be discussed once a firm is selected.

Question 23

We are under several long-term government contracts to provide similar services, however, since those contracts were negotiated, our pricing has increased. None of those agencies are public pension funds or institutional investor clients. How does that impact the representation requested in Section 7, item 8?

Answer 23

An explanation of the pricing proposal for the scope of work should be included in the final proposal. This will include a breakdown of the firms pricing, fees, costs, billing practices, and payment terms that would apply or the firm should provide an explanation as to why this representation cannot be provided. All pricing proposals should be “best and final,” although OCERS reserves the right to negotiate on pricing.