

# University of New Mexico Hospitals

Request for Proposals

Addendum No. 2

**RFP P458-22 Executive Coaching**



**Due Date: June 1, 2022, 2:00 p.m. MST** The time and date proposals are due shall be strictly observed.

**ADDENDUM NUMBER TWO**  
**RFP P458-22 Executive Coaching**  
**Q & A**

1. Is there a preferred number of coaching team members for this project? **Answer:** No.
2. Page 10 Exhibit A /Scope of Work/ Item C. and Page 11 Exhibit B/ Evaluation Criteria / Proposed Plan and Approach/ Item B. Are there specific assessments (StrengthsFinder, Myers Briggs, Enneagram, etc.) being utilized by the executive team at present? **Answer:** UNMH implemented a baseline assessment administered by Healthcare Source, the company that administers our hiring assessment tool, to all our leadership team. The assessment does a forced ranking of ten leadership competencies among peers in the same job family (executives, directors, supervisors). The assessment results may or may not be shared during 1:1 coaching sessions, so the ideal proposal will include an option for an assessment specific to Chief-level positions.
3. Page 10 Exhibit A/ Scope of Work/ Item C.  
Is there a preference between virtual or in-person debriefs? **Answer:** Due to different preferences for each individual, a choice of either in-person or virtual, as well as a blended approach should be proposed based on vendor's capabilities.
4. Page 10 Exhibit A/ Scope of Work/ Item G. Has the preferred platform for materials distribution been identified at this time? **Answer:** No. The proposal should include the vendor's approach(es) for distributing materials, and we will work with our internal Information Technologies department to ensure security protocols are followed should electronic distribution be determined as the preferred method.
5. Would executives being coached desire to have contact with consultants outside of established meeting times? How would these expectations be clearly established? **Answer:** The executives may need to have contact with coaches outside of established meetings. Please include parameters around this in the proposal.
6. Will the cost of reading materials and other coaching resources assigned to executives be covered by the institution or the consulting firm? **Answer:** Cost of materials should be included in the proposal, however, if the preferred method of distribution is electronic, an agreement may be made to have materials printed onsite with cost covered by the organization (by department cost center)
7. Will the consulting firm be provided with any contextual documentation for the historical and contemporary structure and operations of executive leadership? **Answer:** Upon awarding of the contract, the internal committee will meet with the vendor to provide context regarding historical and contemporary organizational structure.
8. Exhibit A (page 10), Scope of Work, Items A. – C.: Please clarify the difference between the services requested in item A for the Chief Officers and the services requested in sections B. and C. for the Executive Director team. Specifically, a “personalized and objective coaching experience” is mentioned in item A, for the Chief Officers, but is not mentioned in items B. and C. for the Executive Director team. Does this mean that UNMH wishes to provide direct coaching to only the Chief Officers and not to the Executive Director team? Or should we infer that direct coaching is a

requested service for the Executive Director team as well? **Answer:** While the initial roll out only involves our Chief Officers, our hope is that the proposal contains a plan for phasing in the second and third tiers of leadership, using the same approach of a personalized and objective coaching experience.

- 9.** Would you please provide us a rough sense of UNMH’s budget for executive coaching services? We ask this because such an estimate helps us determine how to establish the most cost effective project workplan—or allows us to decide not to submit a proposal if we feel we cannot provide the scope and depth of professional assistance required within a prospective client’s budget. **Answer:** At this time, there is not a set budget, as we are seeking a creative approach to a personalized executive coaching experience.
- 10.** Will local providers be given preference in selection? **Answer:** Yes. Preferences will be given for NM Business and New Mexico Resident Veterans Business. See Section 111, 2.1.1 and 2.1.2.
- 11.** Has the UNMH contracted for these services previously? **Answer:** No
- 12.** Is there an incumbent from an existing contract? **Answer:** No
- 13.** Does UNMH anticipate the potential for coaching additional leaders beyond the Chief Executive team? **Answer:** While the initial roll out only involves our Chief Officers, our hope is that the proposal contains a plan for phasing in the second and third tiers of leadership.
- 14.** Is there any data from organizational assessments that have been previously used that is available to inform this effort? **Answer:** UNMH implemented a baseline assessment administered by Healthcare Source, the company that administers our hiring assessment tool, to all our leadership team. The assessment does a forced ranking of ten leadership competencies among peers in the same job family (executives, directors, supervisors). The assessment results may or may not be shared during 1:1 coaching sessions, so the ideal proposal will include an option for an assessment specific to Chief-level positions.
- 15.** What leadership or 360-degree assessments have been used in the past for feedback and development if any? **Answer:** UNMH utilizes leader performance appraisals completed by the upline leader. Using the appraisal and the competency assessment, leaders create an individual development plan. The plan may be utilized during the coaching sessions if the Chief Officer has specific coaching needs identified on the plan.
- 16.** Does the organization have an existing leadership competency or success model? If so, will you share it? **Answer:** UNMH utilizes the Healthcare Source leadership competency model as well as a model created internally by our Organizational and Professional Development department. We will share the internal model with the vendor that is awarded the contract.
- 17.** Will a fully virtual delivery of the executive coaching services be acceptable? If not, what is an acceptable ratio of in-person to virtual delivery for the engagement? **Answer:** Due to different preferences for each individual, a choice of either in-person or virtual, as well as a blended approach should be proposed based on vendor's capabilities.
- 18.** On page 11 under Evaluation Criteria Exhibit B, the RFP requests vendors to “Provide a list of several leadership coaching assignments completed by your firm in the last three (3) years; include the name of the entity, size and industry of the entity and the position title for each coaching assignment.” By requesting the position title for each coaching assignment, this request would violate the confidentiality of our clients and cannot be accommodated. Will you accept a list with only the entity, size, industry of the entity? If not, what alternative will you accept that will not allow an individual to be

identified in order to maintain confidentiality? **Answer:** We will accept a list of only entity, size and industry, provided there is mention on the proposal that the vendor has coaching experience at the C-Suite level.

**19.** Has the University offered Executive Coaching in the past? **Answer:** Yes, but only through our internal Organizational and Professional Development department, and coaching is offered to all levels of leadership.

**20.** Does the University have a current vendor for Executive Coaching? **Answer:** No

**21.** If so, what coaching processes & tools have you used? **Answer:** We have used homegrown coaching templates and met with leaders to help them create and realize their own action plans.

**22.** What types of assessments have you used in the past? **Answer:** UNMH utilizes the Healthcare Source leadership competency model as well as a model created internally by our Organizational and Professional Development department. We will share the internal model with the vendor that is awarded the contract.

**23.** What have you found to be the most effective coaching practices for your organization? **Answer:** One of our most effective coaching practices is the partnership between the coach and the leader with the creation and realization of the action plan. Exceptional coaches have guided the leader through the entire cycle and ensured ownership and buy-in from the leader.

**24.** How is coaching perceived in your organization? **Answer:** Overall, the leadership team views coaching as a benefit, and UNMH advertises it as professional development.

**25.** If you have done prior coaching, what is the average coaching length (i.e. one month, 3 months)? **Answer:** This has been dependent on the defined steps in the action plan, but on average has been 3-6 months.

**26.** In Exhibit B, Evaluation Criteria under Experience of the Firm, bullet B, you request "a list of leadership coaching assignments completed by your firm in the last three (3) years; include the name of the entity, size and industry of the entity and the position title for each coaching assignment." Providing the position title for each assignment potentially violates the privacy of the individuals that have been coached. May we leave out specific titles and use general terms such as "C-Suite Executives, Vice Presidents, Directors or Managers?" **Answer:** We will accept a list of only entity, size and industry, provided there is mention on the proposal that the vendor has coaching experience at the C-Suite level.

**27.** Will the University consider out-of-state vendors? **Answer:** Yes

**28.** RFP Section II. 2.1 (page 6), Number of Responses and Copies, notes that offerors must submit one physical hard copy of the proposal and one electronic copy, and that the electronic copy must not be emailed. In what form should the electronic copy be sent? **Answer:** Send the thumb drive with your proposal and this can be mailed, not emailed.

**29.** Should it be on a flash drive (i.e., to be inserted into a USB port) that is mailed with the original hard copy? **Answer:** Yes send a flash drive with password (if required).

**30.** Can it be uploaded to a site like Dropbox, with instructions on how to access it included with the mailed original hard copy? **Answer:** No

**31.** Section 2.2.2 of the RFP (page 6), Proposal Content and Organization, indicates that proposals should be organized and indexed in the format listed in that section (shown below). Would you please clarify what the numbers in parentheses refer to, in C.a, C.b, C.c, and C.d.?

- A. Table of Contents
- B. Signed Authorized Signature Page (Exhibit D)
- C. Proposal Summary
  - a. Experience of Firm (1-6), Evaluation Criteria
  - b. Qualifications of Personnel (1-2)
  - c. Proposed Plan and Approach (1-3)
  - d. Cost (Exhibit A and Exhibit J) (1)

**Answer:** See Addendum one question 9.

**32.** The final sentence in item 3 of Exhibit J (page 29), states: “Please use the chart below to provide your pricing for the Mental Health Wellbeing.” We assume that this text is in error and that pricing is request for Executive Coaching services. Please confirm this. **Answer:** This is an error. It is for Executive Coaching