Annex A: Terms of Reference

Provision of Coaching Services to UNHCR

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1.1 Background

1.1.1 Introduction

The United Nations High Commissioner for Refugees (UNHCR), is soliciting proposals from qualified companies with experience in coaching mid and senior-level managers.

The objective of the required coaching services is to provide support for personal development. The coaching may be incorporated in and/or independent from the already existing learning programmes offered by UNHCR's Global Learning Centre.

1.1.2 Background

UNHCR's Global Learning Centre (GLC) has been entrusted with the mandate of providing learning solutions for all colleagues across UNHCR. The Management, Leadership, Communication and Innovation (MLCI) Unit in the GLC, delivers tailor made and needs based learning solutions for UNHCR's colleagues worldwide with a special focus on the organization's management and leadership.

The current MLCI programmes target managers and leaders of all levels from first time managers to country representatives and senior managers. Some of the management development programmes include a coaching component which is to be carried out with the involvement of the provider herewith selected. In addition to the coaching provided within these learning programmes, the MLCI Unit wishes to offer "standalone" developmental coaching, independent from the ongoing training programmes.

UNHCR's management and leadership development programmes typically include a coaching component, from 2 to 6 hours per person depending on available funds. These programmes have been offered for a number of years. In 2017 the MLCI unit of the GLC piloted a 'standalone' coaching opportunity for 100 targeted colleagues, 70 signed up, and the pilot was closed with very good evaluation results. The target audience consisted of mid-level managers. Some UNHCR colleagues are familiar with the meaning of coaching, however the majority uses the term "coaching" interchangeably with "on the job tutoring" etc. In light of this the launch and the implementation of the programme is critical to achieve success in making coaching an accessible and widely used developmental tool across the organisation.

An internal online blended coaching programme has been available for colleagues for three years. The objective of the course is to enhance coaching skills to be used in relevant situations as well as to enrich colleagues' management style repertoire and expand towards the less directives styles, when appropriate.

1.2 Statement of Purpose & Objectives

1.2.1 Purpose and objectives

The purpose of this Request for Proposal is to identify one or more suitably qualified team(s) of coaches to support the development of UNHCR managers and leaders by the coaching services provided as part of the existing management programmes described hereafter and/or individually and independently from these.

The pilot version of this innovative learning-cum-coaching programme is based on the following documents providing the formal backdrop against which managers and leaders of UNHCR are expected to deliver the objectives of the organization:

- December 2008 UNHCR Competency Framework
- 2009 Global Management Accountability Framework and UNHCR's strategic objectives
- Competencies of the UN Leadership Framework
- UNHCR's People Strategy 2017-2021
- UNHCR's Strategic directions for 2017-21.

The selected vendor(s) will be provided access to these documents. In addition to the directions provided in the above documents, informal consultations have identified a need for senior managers (D1 and above) to access a reflective space to further develop their individual leadership skills.
Therefore, this project is undertaken to develop, implement, monitor and evaluate a viable and cost effective programme for coaching within UNHCR for various levels of management and leadership.

The expected benefits of a UNHCR management and leadership coaching programme include but are not limited to the following:

- Enhanced effectiveness of senior leaders/managers across the organization,
- Enhanced job satisfaction of senior leaders/managers,
- Development of a supportive culture for colleagues in management and leadership positions,
- Improved alignment to organizational mission and strategies,
- Cultural change within UNHCR.

1.2.2 Scope and focus

The project scope covers the following deliverables:

1. Conducting coaching sessions. Conduct coaching sessions for
    a. participants of the existing management & leadership development programmes described hereafter and/or
    b. requesting colleagues in management and leadership positions (not linked to learning programmes).

    The service must be available to all interested staff members in the relevant categories regardless of physical location, at maximum effectiveness and minimum cost. The sessions are to be conducted via a two-way virtual video platform (such as Skype or other virtual means) except in case the coach

identified is in the same location as the coachee. UNHCR will not reimburse any costs for travel or phone.

2. Monitoring and evaluation. The selected provider is requested to submit a plan for monitoring the delivery and evaluating the effectiveness of the coaching services. UNHCR reserves the right to review and approve individual elements of the proposed monitoring and evaluation strategy before execution by the selected provider.
3. Reporting results. The coaches will be requested to report back the number of attended coaching sessions to UNHCR, and to provide general feedback particularly related to shortcomings or strengths of the support systems within UNHCR. Further feedback about the coaching may be collected through anonymized surveys on the annual basis.

Suggested parameters for the project plan:

a. Global reach
b. Diversity of coaches (language, ethnicity, experience and gender)
c. Relevance of coach background to target group
d. Minimum re-current cost vs. maximum outreach
e. Distance and face-to-face modalities
f. Monitoring data
g. Launch strategy
h. Debriefing meeting

1.2.3 Target Audience

A. Learning programme related individual coaching

Innovation Fellowship Programme

The yearlong Innovation Fellowship programme is managed by the UNHCR Innovation Service in partnership with the UNHCR Global Learning Center (GLC), and aims to foster the culture of innovation at UNHCR. The programme focuses on building the Fellows' innovation competencies in addition to supporting them facilitate innovation with colleagues, partners, and refugees in their own operations or divisions. Over the course of the year, Innovation Fellows learn and use innovation methods, tools, and embed new approaches in innovation projects. They focus on problem-solving, ideation and experimenting solutions to real-life challenges in the field or at Headquarters, with the aim of transforming these challenges into action-oriented projects and opportunities for change.

As part of the external support the Fellows benefit from during their learning process, coaches are required to work with them to improve their effectiveness and performance, and help them achieve their full potential when driving innovation in their respective operations and/or UNHCR at large.

***Grade**:* all staff and affiliated workforce

***Expected number** of target audience per year:* max. 25

***Number of coaching hours** required:* 6 hours over a period of 12 months during their participation in the programme.

***Timeframe:** first half of 2019*

Inter-Agency Coordination Learning Programme (IACLP)

The Inter-Agency Coordination Learning Programme is currently being revised into a multi-level learning programme targeting staff across functions and grades. The IACLP will have three levels. All three levels contain a coaching element. For levels II and III there will be an option of professional coaches, while for level I participants, current participants or alumni of level II will be assigned as internal coaches.

In addition to bringing in external experience for coaching from both the private sector and from humanitarian partners, the learning programme will establish a roster of alumni and others with considerable experience in inter-agency coordination to serve as internal coaches. The focus on coaching will the twofold: 1. Support on the course materials and how these relate to actual work expediencies; and 2. The joint action plan developed with the learner.

For participants in level III of the learning programme the coaching will form the main element of learning delivery. Participants at this level will be presented with a list of 3 possible coaches and asked to select a coach the learner would feel comfortable working with. This person could be internal or external, depending on the learners preference. The list would contain retired/internal candidates, professionals from the private sector, OCHA staff, partners, and other external coaches. (Read in conjunction with para 1.1.2.)

***Grade**:* D1 and D2s deployed to particularly challenging environments
***Expected number** of target audience per year (for external coaching):* 25
***Number of coaching hours** required:* 4 at level 1 (external coaching) and up to 10 at level III (internal coaching)
Timeframe: Yearly – start up for coaching is early 2019

Management Learning Programme (MLP)

The Management Learning Programme targeting colleagues at the mid-management level. It is an blended learning programme designed to support key objectives in DHRM's People Strategy that are part of an overall shift towards a more caring, actively managing and accountable management culture at UNHCR. The overall objective of the MLP is to strengthen participants' managerial competencies in order to improve team performance, staff motivation and efficiency. Starting 2018, the completion of the MLP is a requirement for P3 colleagues in case they wish to apply for P4 positions.
The MLP combines theory with practical application through a self-study and a tutored assignment phase. The self-study phase includes e-learnings focusing on self-awareness and individual as well as team management whereas the tutored phase includes several practical assignments and a valuable 360 degree assessment exercise with feedback. The aim of the coaching of MLP participants is to provide them with detailed, comprehensive feedback on their results during the 360 exercise.
***Grade**:* P3
***Expected number** of target audience per year:* 430*
***Number of coaching hours** required:* 2
***Timeframe:** ongoing staring in 2019*

- For 2018 UNHCR already has a selected provider, the services will be required under this RFP from 2019. The number of future target audience is subject to available funds.

CP-SLM

CP-SLM is a blended learning programme that aims to enhance functional knowledge of staff at the P4 level as well as to objectively assess one's individual managerial competencies and leadership skills to assume higher level positions. During the management assessment participants need to demonstrate key managerial and leadership competencies through multiple exercises, upon which they will be assessed for senior management and leadership positions.

Colleagues not passing the assessment, but achieving results that are close to the pass rate will be entitled to coaching to set developmental goals in order to successfully attempt the assessment at the next opportunity.

***Grade**:* P4

***Expected number** of target audience per year: 100*

***Number of coaching hours** required:* 4

***Timeframe: From** November onwards*

Strategic Leadership Programme (SLP)

The programme enhances the capacity of senior UNHCR leaders' ability to respond effectively to current and future leadership challenges. The SLP is effective for senior managers and leaders to become more self-aware and develop a more strategic outlook.

The Strategic Leadership Programme concentrates on the following objectives:

- To further develop leadership potential and practice strategic leadership with authenticity and integrity;
- To practice strategic thinking; mentoring and coaching of staff and peers;
- To draw out the specific strengths of management teams;
- To navigate the complexities of collaborations with other agencies and key stakeholders (including staff groups) with diverging interests and positions.

***Grade**:* P5

***Expected number** of target audience per year:* 75 in 2018 and 2019 depending on the number of applicants. In following years we estimate the number significantly less.

***Number of coaching hours** required:* 4-6

***Timeframe:** coaching starting in 2019. The SLP starts in 2018 Q4.*

B. Individual coaching independent from learning programmes:

<u>Resident Coordinator (RC) and Humanitarian Coordinator (HC) candidates</u>

The **Resident Coordinator** is the leader of the United Nations Country Team (UNCT) and as such plays a central role at the country level. The RC is responsible for the coordination of UN operational activities for development in order to ensure alignment of UN assistance with national development priorities, plans and capacity building in the context of internationally agreed treaty obligations and development goals, and placing the UN centrally in development and international cooperation in the country.

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The purpose of the coaching is to prepare the candidates to pass the assessment, therefore the potential provider must have a proven record of having successfully prepared candidates.

***Grade**:* D1-D2
***Expected number** of target audience per year:* 2-5
***Number of coaching hours** required:* 5-6 over a period of 3-4 months
***Timeframe:** starting in 2019*

Newly appointed Heads of Offices and Sub-Offices in hardship duty stations

Colleagues in management and leadership positions are expected to lead by example, motivate and demonstrate the care for the staff, ensure achieving results through teamwork, and yet they find themselves under a lot of pressure and often alone. While psychological support is made available to everybody in the organisation, coaching services for colleagues in management and leadership positions are meant to support their people management strategies. Therefore, coaching support is expected to:

- provide reflective space, room for discussing dilemmas and support in decision making,
- allow them to review, analyse and evaluate team dynamics, and
- provide opportunities to re-assess their leadership skills and challenges they are meeting.

Individual coaching support may be requested by any manager or leader in UNHCR. Some colleagues potentially requesting individual coaching are from the below groups of target audiences. During coaching of Heads of Offices and/or Sub-Offices, the coaches will be expected to focus on people management and leadership issues. In case of physical and mental health issues, the clients should be referred to the available internal or external resources of staff welfare, ethics and conflict resolution/mediation.

To address challenges in addition to what is specified in the first paragraph of this section – the provider might offer group coaching or other alternative solutions to support colleagues working in remote and isolated duty stations.

***Grade**:* P3-P5
***Expected number** of target audience per year:* 70-120
***Number of coaching hours** required:* 6 over a period of 12 months after being appointed.
***Timeframe:** ongoing*

Graduates of the Certification Programme in Human Resource Management (CP-HRM)

CP-HRM graduates aspiring to apply (or presently serving) to HR Field Service positions or HR officers in field locations. The aim of CP-HRM is to train HR practitioners to be strategic partners and trusted HR advisors in their operations. By the nature of their job they need to be provided with a reflective space and coaching

support. They are also meant to benefit from learning the coaching skills through the coaching process.
***Grade**:* G5-P4
***Expected number** of target audience per year:* 20-40
***Number of coaching hours** required:* 6 over a period of 6 months after graduating from CP-HRM.
Timeframe: February – September

Individual colleagues

Colleagues in leadership and management positions might require coaching support up to six hours each.

a. Target audience: summary table

SUMMARY	Programme / Target Group Name	Grade	Exp. N° of target audience / Year	N° of coaching hrs / prs	Cumulative no. of coaching hours
A. Learning programme related individual coaching: Participants of ongoing learning programmes	Innovation Fellowship Programme	all staff and affiliated workforce	max. 25	6 over a period of 12 months during their participation in the programme	150
	Inter-Agency Coordination Learning Programme (IACLP)	D1 and D2s deployed to particularly challenging environments	60	4	240
	Management Learning Programme (MLP) (Note that for 2018 we have a provider)	P3	430	2 over a period of 3 months	860
	CP-SLM	P4	100	4	400

	Strategic Leadership Programme (SLP)	P5	75	3 over a period of 6 months	225
B. B) Individual coaching independent from learning programmes for developmental purposes	Resident Coordinator (RC) and Humanitarian Coordinator (HC) candidates	D1-D2	2-5	5-6 over a period of 3-4 months	15-18 (average)
	Newly appointed Heads of Offices and Sub-Offices in hardship duty stations	P3-P5	70-120	6 over a period of 12 months after being appointed	570 (average)
	Participants and colleagues graduated from the Certification Programme in Human Resource Management (CP-HRM)	G6-P4	20-40	6 over a period of 6 months during their participation in CP-HRM	180 (average)
	Individual colleagues	TBD	TBD	TBD	TBD

1.2.4 Scope of proposals to be submitted

Potential vendors are invited to submit their proposals to at least one of the following sets of coaching services:

A) **Learning programme related individual coaching**
B) **Individual coaching independent** from learning programmes

Please note that all the programmes are planned to be recurring for multiple years subject to available funds.

[redacted]

2.1 Project title, or core requirement

UNHCR is looking for one or more seasoned consulting company / consortia of consultants with extensive UN/UNHCR leadership coaching experience at the senior most level and at management level.

Entities responding to this RFP should demonstrate how the proposed coaching team meets the following minimum qualifications and/or experience:

- Experience in coaching for global audience
- Fluency (level B2/C1) in other UN languages (French, Russian, Arabic, Spanish and Chinese) is an advantage
- Computer literate with access to internet
- Relevant coaching and academic background
- Recent experience in working with the UN/UNHCR or other international and humanitarian organisations is an advantage
- Experience in coaching linked to blended learning programmes is an advantage
- Coaching qualifications from recognised Coaching Associations (ICF or equivalent) are desirable
- A variety of national backgrounds and experiences in working in multicultural environments;
- Diversity in gender, languages, ethnicity and geographical location;
- Understanding of UNHCR staff, culture, management and leadership development efforts.
- Relevant Certificates/Qualifications can be included in the technical proposal.

Quality Assurance:

The bidders have to demonstrate and describe the quality assurance plan and mechanism they have in place to ensure consistently high quality coaching.

Consideration:

The bidders have to demonstrate that they can provide the adequately skilled people to assume the responsibilities and perform the coaching services. No substitutions will be made without prior written consent from the GLC. The company shall guarantee that the services will be uninterrupted for the duration of the contract. Absences due to an emergency situation need to be approved by the GLC and a solution agreed so that the ongoing project is not adversely affected.

The selected provider will agree to deliver the following services over the duration of the partnership:

1. Preparation.
   The selected provider(s)' coaches will familiarize themselves with the relevant context and if applicable with the course content with the support and guidance of the UNHCR Project Manager.
2. Conducting coaching sessions.

- Conduct training related coaching sessions for target audiences described in para 1.2.3. The service must be available to all interested staff members regardless of physical location, at maximum effectiveness and minimum cost. The sessions are to be conducted via a two-way virtual video venue (such as Skype or other virtual means) except in case the coach identified is in the same location as the coachee. UNHCR will not reimburse any costs for travel or phone.

3. Monitoring and evaluation.
   - Create and execute a plan for monitoring the delivery and evaluating the effectiveness of the coaching services. UNHCR reserves the right to review and approve individual elements of the proposed strategy before execution.
4. Reporting results.
   - Report the number of attended coaching sessions to UNHCR, and provide general feedback particularly related to shortcomings or strengths of the support systems within UNHCR. Further feedback about the coaching may be collected through anonymized surveys on the annual basis.

2.2 Other services, required for the performance of the key requirements

2.2.1 Communication during the project

The project is anchored within the Global Learning Centre of UNHCR and will be led by a UNHCR appointed Project Managers responsible for the different management development programmes) coordinated by a Project Lead. The UNHCR Project Managers will provide logistical support to the selected provider and ensure the necessary internal UNHCR coordination and consultations are happening. The Project Managers will be operationally responsible for the coaching conducted linked to the training programme in their area of responsibility. The selected provider will be briefed by the UNHCR Project Lead about UNHCR's culture, the key specific operational directions, management and leadership development efforts, and internal mechanisms of support and of addressing grievances.

The selected provider(s) will appoint a Project Manager to act as a focal point for eventual consultations and joint coordination of the programme with UNHCR before the launch. A different Project Manager (but subject to approval by UNHCR's Project Manager/Project Lead) may be appointed to manage communication and logistics related to the execution phase as well as to monitoring, evaluation and reporting. The Project Manager(s) of the selected provider(s) will be guided by and will work in cooperation with the UNHCR Project Manager and Project Lead.

Communication related to monitoring and evaluation of the coaching sessions as well as reporting about them must respect the preliminary agreements and guidance about confidentiality. In case of the stand-alone individual coaching sessions for developmental purposes the content of the sessions must be strictly confidential to enable the managers and leaders to openly discuss their challenges, and consider effective ways of addressing them. In case of the programme-related coaching, the coaches will be requested to provide general

feedback about the pattern of the content to UNHCR, particularly related to shortcomings or strengths of the support systems within UNHCR. In case of both types of coaching, the number of attended sessions will be reported back to UNHCR in. Further feedback about the coaching may be collected through anonymized surveys on the annual basis.

2.2.2 Assigning the coaches

Each selected coachee will receive the invitation to be paired up with an external coach and we expect that at least one session of introduction will take place. Should the coachee wish to work with someone else than the coach originally assigned to him/her, it should be possible to change the coach once.

2.3 Customer Responsibilities

The Expected Role of the GLC

- The GLC maintains regular contact with focal point of the coaching team(s)
- The GLC will determine and agree on concrete timelines, project milestones and deadlines with the selected vendor

In case of coaching linked to learning programmes:

- The GLC announces the courses and administers registration through the Learn&Connect platform
- The GLC gives selected participants access to programme on Learn&Connect
- The GLCs sets up the course on Learn&Connect
- The GLC runs course evaluation through the Learn&Connect platform at the end of the course
- Provider selects and train coaches in cooperation with the GLC
- Provider allocates coaches to learners
- Provider monitors the coaching progress
- Provider (lead) maintains regular contact with the GLC

2.4 Add any additional relevant sections for the specific project

[redacted]

Your Technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

3.1 Company Qualifications

- A description of your company with evidence of your company's capacity to perform the services required, including:
  - Company profile, registration certificate and last audit reports
  - Quality assurance plan/certification documents (if any)
- If a multi-location company, please specify the location of the company's headquarters, and the branches that will be involved in the project work with founding dates
- General company qualifications & company understanding of humanitarian sector
- Recent relevant experience in successful completion of similar projects

3.2 Proposed Services

- Proposed approach and methodology to coaching and selection of coaches. Proposed method to monitor coaches, administration
- Proposed project management set-up

3.3 Personnel Qualifications

- Coaching certification and academic background of coaches
- Experience of proposed coaches

The technical proposal should mirror the structure of this TOR. The volume of the technical proposal, excluding the CVs, should not exceed 15 pages.

Vendors may submit a proposal for one or more deliverable of the TOR, clearly indicating the programme title(s).

3.4 Vendor Registration Form

If your company is not already registered with UNHCR, please complete, sign, and submit with your Technical Proposal the Vendor Registration Form (Annex C).

3.5 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services by signing this document (Annex D) and including it in your submitted Technical Proposal.

[redacted]

4.1 Technical Evaluation

The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: **70%** from the total score.

Company Qualifications	• General company qualifications & company. Ability to recruit, train and coordinate the necessary number of coaches with the required qualifications to smoothly deliver the required services.	5
	• Recent relevant experience in successful completion of similar projects.	10
Proposed Services	• Proposed approach and methodology to coaching and to selection of coaches.	20
	• Proposed project management set-up; Proposed method to monitor coaches, administration.	15
Proposed Personnel	• Relevant academic and coaching qualifications of proposed coaches.	10
	• Demonstrable experience of coaches in management/leadership coaching; understanding of humanitarian sector and UN operations	10
Total		**70**

The technical criteria will be subject to minimum passing weighted score of 42 out of 70; if a bid does not meet these minimums it will be deemed technically non-compliant and will not proceed to the financial evaluation.

Furthermore some technical criteria (Proposed approach and methodology and Personnel Qualifications) will be subject to minimum passing scores; if a bid does not meet these minimums it will be deemed technically non-compliant and will not proceed to the financial evaluation.

[redacted]

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier.

Performance will be monitored based on actual coaching hours completed and on L1 evaluation of the coaching. The vendor must provide periodic recorded of the actual coaching hours completed and might propose a feedback platform for evaluating the coaching.

For the coaching services associated to learning programmes UNHCR will include a component in the online L1 evaluation administered on Learn&Connect.