

MASTER SERVICES AGREEMENT

AGREEMENT #: C0003897

This Master Services Agreement (“MSA”) is made and entered into as of the date the last authorized signature is affixed hereto by KickStart Specialists, LLC, (“Contractor”) and Virginia Commonwealth University, a corporation and an institution of higher education of the Commonwealth of Virginia, (“VCU”). Contractor and VCU are sometimes referred to as a “Party” and collectively as the “Parties.”

RECITALS

WHEREAS, Contractor provides various executive coaching services; and

WHEREAS, VCU desires to use executive coaching services on an as-needed and optional-use basis; and

WHEREAS, Contractor is willing to offer executive coaching services to VCU in the manner described herein.

NOW, THEREFORE, in consideration of the mutual promises set forth herein and for other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties hereby agree as follows:

1. **CONTRACT DOCUMENTS.** The contract documents are integrated and shall consist of:

- a) Master Services Agreement
- b) Appendix II – Offeror Response Form
- c) RFP#: 175357155CK in its entirety (incorporated herein by reference)

All of the foregoing, together, (the “Contract”). Should a conflict arise among the foregoing, Master Services Agreement, Appendix II – Offeror Response Form, and RFP#: 175357155CK in its entirety, this MSA shall control.

2. **SERVICES.** Contractor shall provide to VCU executive coaching services as set forth in “Conditions of Award” in Appendix II, and any statements of work or similar document later agreed upon between the Parties.

3. **ENTIRE AGREEMENT.** This Master Services Agreement (MSA), including Appendix II and Appendix III will serve as the complete MSA between Contractor and VCU. The contract between Contractor and VCU (the “Contract”) includes this MSA and statements of work (SOW) or other similar documents (collectively, the “contract documents”). In the event of a conflict among the contract documents, the order of precedence will be: this MSA first and then the SOW or other similar documents.

4. **TERM and RENEWAL OF CONTRACT.** The term of this MSA commences on the Effective Date and ends on September 30, 2025. This MSA will renew upon mutual agreement of authorized representatives for both parties, unless otherwise terminated, under the terms and conditions for three (3) additional two (2) year periods until June 30, 2031.

5. **EFFECTIVE DATE.** This MSA is binding on the date that the last authorized signature is affixed.

6. FEE. VCU shall pay Contractor a fee in accordance with Appendix II and Appendix III as agreed between the Parties. Unless set forth otherwise in Appendix II, all invoices shall be paid net 30 days following receipt of a proper invoice, services rendered, or goods delivered, whichever is later pursuant to and in accordance with § 42-45 of the *Rules Governing Procurement of Goods, Services, Insurance and Construction by a Public Institution of Higher Education of the Commonwealth*.

7. DEPOSIT. VCU shall not be required to pay a security deposit.

8. TERMINATION. VCU may terminate this MSA with or without cause with sixty (60) days prior written notice to Contractor. VCU shall pay any outstanding fees due for Services performed up to the termination date. If Contractor breaches this MSA, in addition to any other rights or remedies, VCU may terminate this MSA without prior notice.

9. WORK MADE FOR HIRE. VCU is engaging the services of Contractor to provide Services as described herein for or on behalf of VCU. Contractor recognizes and agrees that all work and products that Contractor creates or develops within the scope of this MSA will be Work Made for Hire that belongs to VCU and will remain the property of VCU. VCU will exclusively own, solely and completely, any work, deliverable, process, product, idea, concept, or social media page – whether such may be protected by intellectual property laws or not – that Contractor creates, conceives or develops, in whole or in part, within the scope of this MSA. To the extent that Contractor's work for VCU may not be deemed a Work Made For Hire, Contractor hereby assigns all of its ownership, interest and intellectual property rights in such works completely and exclusively to VCU.

10. INSURANCE. Contractor certifies that it has and shall maintain the following insurance coverages for the term of this MSA and that all such insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

- a. COMMERCIAL GENERAL LIABILITY. \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. VCU must be named as an additional insured and so endorsed on the policy.
- b. PROFESSIONAL LIABILITY. \$1,000,000 per occurrence.
- c. AUTOMOBILE LIABILITY, where applicable. \$1,000,000 combined single limit.
- d. CYBER SECURITY LIABILITY, where applicable. \$5,000,000 per occurrence.

11. CONFIDENTIALITY. Contractor may obtain confidential and proprietary information from VCU during the performance of the services under this MSA. Such confidential and proprietary information may be disclosed in writing, orally or contained via any other media. "Confidential Information" is defined as any information designated as confidential by VCU, including but not limited to information about VCU personnel and students of VCU to the extent such information is not available to the public domain in accordance with the laws of the Commonwealth of Virginia and the Family and Education Records Privacy Act (FERPA).

Contractor agrees that all Confidential Information shall be held in the strictest confidence and shall not be used for purposes other than its business with VCU. Contractor agrees not to release, copy or discuss in any format any Confidential Information. Contractor shall disclose Confidential Information only to its officers, directors, or employees with a specific need to know who are held to the confidentiality standards of this MSA. Contractor shall not disclose, publish or otherwise

reveal any Confidential Information received from VCU to any other party whatsoever, except with the specific prior written authorization of VCU.

Upon the completion of the services and upon request of VCU, Contractor shall return all Confidential Information received in written format, including copies or reproductions of or other media containing Confidential Information within seven (7) calendar days of such request. At Contractor's option, any such documents or other media developed by Contractor containing Confidential Information may be destroyed by Contractor provided that Contractor provides VCU a written acknowledgement that all media containing Confidential Information has been destroyed by Contractor.

12. ADVERTISING. All advertising and promotion materials, whether print or electronic, that display a VCU trademark, logo, or otherwise refers to VCU must be reviewed and approved by VCU's Division of University Relations prior to use. VCU retains all rights, title and interest to its trademarks, logos and other intellectual property.

13. LIMITATION OF LIABILITY.

- a. THE TOTAL CUMULATIVE LIABILITY OF VCU, ITS OFFICERS, EMPLOYEES AND AGENTS IN CONNECTION WITH THIS MSA OR IN CONNECTION WITH ANY GOODS, SERVICES, ACTIONS OR OMISSIONS RELATING TO THIS MSA, SHALL NOT UNDER ANY CIRCUMSTANCE EXCEED PAYMENT OF THE MAXIMUM PURCHASE PRICE. REGARDLESS OF ANY PROVISION HEREIN, CONTRACTOR SHALL BE LIABLE FOR ALL PERSONAL INJURY AND PROPERTY DAMAGE RESULTING FROM CONTRACTOR, ITS AGENTS, OFFICERS, DIRECTORS, AND AFFILIATES NEGLIGENCE, GROSS NEGLIGENCE, OR WILLFUL MISCONDUCT.
- b. Contractor shall be liable for the actual damages caused by the negligence of itself, its officers, employees and agents in connection with this MSA or in connection with any goods, services, actions, or omissions relating to this MSA.

14. INDEMNITY. Contractor agrees to indemnify, defend, and hold harmless VCU, the Commonwealth of Virginia, and their officers, employees and agents from any claim, damage, liability, injury, expense or loss, including defense costs and attorneys' fees, arising from Contractor's negligence under this MSA. Accordingly, VCU shall promptly notify Contractor of any claim or action brought against VCU in connection with this MSA. Upon such notification, and at the request and direction of VCU and/or the Office of the Attorney General, Contractor will immediately defend any such claim or action pursuant to the provisions and requirements of § 2.2-514 of the *Code of Virginia (Virginia Code)*.

15. REGULATIONS. During the performance of this MSA, Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of Contractor. Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause. Contractor, in all solicitations or advertisements for employees placed by or on behalf of Contractor, will state that Contractor is an equal opportunity employer; and (2) Contractor agrees to (a) provide a drug-free workplace for Contractor's employees; (b) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in Contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (c) state in all

solicitations or advertisements for employees placed by or on behalf of Contractor that Contractor maintains a drug-free workplace; and (d) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

16. FORCE MAJEURE. Neither Party will be responsible for any losses resulting from delay or failure in performance resulting from any cause beyond either Party's reasonable control, including without limitation, war, strikes or labor disputes, civil disturbances, fires, natural disasters, pandemics, including if VCU, in its sole discretion, must close a campus location or take other restrictive actions due to concerns related to the COVID-19 pandemic or acts of God. If the delay or failure in the performance of the Party claiming Force Majeure continues for thirty (30) days or more, then the Party not claiming Force Majeure may terminate this MSA by written notice to the other Party without penalty. Any funds paid will be reimbursed pro rata based on Services not provided.

17. GOVERNING LAW AND FORUM. This MSA shall be construed, governed, and interpreted pursuant to the laws of the Commonwealth of Virginia without regard to choice of law principles. Contractor agrees that all disputes arising under this MSA will be brought before a court of competent jurisdiction located in Richmond, Virginia. VCU does not waive its right to jury trial.

18. SOVEREIGN IMMUNITY. VCU is an agency of the Commonwealth of Virginia and is afforded the protection of sovereign immunity under Virginia law. Any claims against VCU or the Commonwealth of Virginia are subject to the requirements established under Virginia law for bringing such claims against VCU or the Commonwealth of Virginia, including the Virginia Tort Claims Act (*Virginia Code* §§ 8.01-195.1 et seq.) and other applicable statutes relating to claims against the Commonwealth or its agencies. Notwithstanding any other provision, nothing in this MSA shall be deemed to be or construed as a waiver of VCU's or the Commonwealth of Virginia's sovereign immunity, or any other applicable requirements under Virginia law for bringing claims against VCU or the Commonwealth of Virginia.

19. ENTIRE AGREEMENT. This Master Services Agreement (MSA) and Appendix II will serve as the complete contract between Contractor and VCU. The contract between Contractor and VCU may include statements of work (SOW), a data protection addendum (DPA), or other similar documents as necessary. In the event of a conflict among the contract documents, the order of precedence will be: this MSA, Appendix II, if applicable, the DPA, SOW, and then the RFP.

20. MISCELLANEOUS. This MSA may be executed in any number of counterparts, each of which shall be deemed an original, but all such counterparts together shall constitute but one and the same instrument. The relationship between VCU and Contractor created by this MSA is that of independent contractors. Nothing contained herein shall be construed as constituting any other relationship between VCU and Contractor. Contractor shall not assign this MSA to another party without the written consent of VCU. The conditions and covenants herein contained shall inure to the benefit of and are binding upon the parties hereto, their personal representatives, successors and permitted assigns. As a registered vendor in eVA and/or RealSource, Contractor is responsible for the security of its portal account, including restricting access to it, maintaining the confidentiality of login information, and taking any other actions necessary to protect the security of the Contractor's account. VCU will not be responsible for a third party's fraudulent collection of VCU payments due to the Contractor's failure to update or protect its account information.

20. NOTICES. All notices, requests, demands and other communications which are required or permitted to be given under this MSA shall be in writing and shall be deemed to have been duly given upon the delivery or receipt thereof, as the case may be, if delivered personally or sent by

registered or certified mail, return receipt requested, postage prepaid, to the respective Party hereto.

Contractor:

KickStart Specialists, LLC
Attention: Kate Foster
11809 Crown Prince Circle
Henrico, VA 23238
804-873-3931
kfoster@kickstartspecialists.com

VCU:

Virginia Commonwealth University
Procurement Services
912 W. Grace Street, 5th Fl
Richmond, VA 23284
procurement_services@vcu.edu

IN WITNESS WHEREOF, the Parties to this MSA by their duly authorized representatives have executed this MSA the day and year below.

Virginia Commonwealth University

DocuSigned by:
By: John McHugh
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Printed Name: John McHugh

Title: Director, Procurement Services

Date: 2/26/2024

KickStart Specialists, LLC

By: Kate Foster

Printed Name: Kate Foster

Title: Principal

Date: 2/21/24



VCU Procurement Services

APPENDIX II

OFFEROR RESPONSE FORM

RFP 175357155CK – EXECUTIVE COACHING SERVICES

1. General Information

- A. **Contractor Name:** KickStart Specialists, LLC
- B. **Street Address:** 11809 Crown Prince Circle
- D. **City:** Henrico
- E. **State:** VA
- F. **Zip Code:** 23238
- G. **Phone Number:** 804-873-3931
- H. **Email Address:** contact@kickstartspecialists.com
- I. **Brief history of the firm:**

KickStart Specialists is a small, women-owned micro business located in the Richmond area. Our company Principals, Kate Foster and Bob Riley, have over 59 years of combined leadership experience with Virginia-based large corporations and consulting firms prior to forming KickStart Specialists in 2011. Our company provides custom learning, coaching, and leadership development solutions that are thought provoking, immediately beneficial, meaningful to participants, and fun. Our service areas are coaching, consulting, profiling and assessments, team building, retreat planning and keynote speaking to assist organizations and individuals manage change, maneuver obstacles, and implement strategies for success. Leveraging our strong leadership and training backgrounds, we have worked successfully with organizations in many industries throughout Virginia, including non-profits, state agencies, municipalities, hospitals, small businesses and large corporations.

- J. **Client Reference List:** (Provide at least one business reference)

#1 - Reference Name: Poarch Thompson Law
Contact: Rachel Thompson, Managing Attorney
Phone #: 540-387-1005
Address: 201 S. College Ave Salem VA 24153
E-mail address: rachel@poarchlaw.com

Description and date(s) and services provided: For the past 4 years we have provided executive coaching on a weekly basis for the Managing Partner, as well as for selected lawyers at this immigration practice. As a result of ongoing executive coaching, the Managing Partner says she is much more strategic in her approach to running the firm, and she is much more proactive now in managing the staff and lawyers. Since 2016, we have provided a variety of leadership development services to the leadership team at Poarch Thompson Law. The entire staff has completed DISC, CliftonStrengths, and

Emotional Intelligence assessments and we have facilitated annual workshops. Dates of Service: February 2016 - present

#2 - Reference Name: VDOT – Performance Transformation Division

Contact: Jay Styles, Division Administrator

Phone #: (804) 356-5398

Address: 1401 E. Broad St. Richmond VA 23219

E-mail address: Jay.Styles@VDOT.Virginia.gov

Description and date(s) and services provided: The Performance Transformation Division uses KickStart Specialists on an ongoing basis to assess where the team is as it relates to culture, employee satisfaction, productivity, challenges, and leadership development. KickStart Specialists utilized a combination of group surveys and interviews to establish a baseline to determine what is going well and challenges for the team. KickStart Specialists then prepared a summary report that included recommendations for improvements. These recommendations included a combination of tasks that the team could complete independently as well as suggestions that may be best provided via a 3rd party to improve culture and address challenges. KickStart Specialists currently provides ongoing services as needed and conducts periodic check-ins to ensure the team is making progress toward their goals and provides follow-up leadership and team building activities (along with a DISC workshop). Dates of Service: July 2023 - present

#3 - Reference Name: City of Chesapeake – Chesapeake Integrated Behavioral Healthcare (CIBH)

Contact: Ed Gonzalez

Phone #: (757) 943-2482

Address: 224 Great Bridge Blvd, Chesapeake, VA 23320

Email address: egonzalez@chesapeakeibh.net

Description and date(s) and services provided: In June of 2022, the CIBH division leadership team lost their director. One of the existing managers was promoted into the Director role and realized quickly that he was facing some leadership challenges. The leadership team had struggled with building an environment of transparency and accountability which led to a lack of trust and team cohesion that was undermining the health of the group, and the rest of the CIBH organization. The leadership team completed a survey assessment and individual interviews with KickStart Specialists to identify the challenges. KickStart Specialists recommended a long-term approach to strengthening the CIBH leadership team, with some immediate short-term action steps. Short-term goals focused on building the strength of the leadership team. A 100-day plan consisting of leadership development group coaching sessions/training, team building, and the development of core leadership tools was utilized. Afterward, surveys and interviews were designed and conducted by KickStart Specialists targeting staff within the entire organization to establish a baseline and identify strengths and challenges. KickStart Specialists submitted a findings report that highlighted the organizational challenges and included recommendations for moving forward. Currently, different program areas are partnering with KickStart Specialists for coaching, team building, and leadership development activities, including DISC assessments. Dates of Service: November 2022 – present.

#4 - Reference Name: Family LifeLine (Non-profit)

Contact: Katina Williams

Phone #: (804) 837-8840

Address: 2325 West Broad St Richmond VA 23220

Email address: Williamsk@yourunitedway.org

Description and date(s) and services provided: KickStart Specialists has been facilitating executive coaching and leadership development services to Family Lifeline since 2012. In 2020 the long-standing

CEO resigned to take on a new opportunity. The selected replacement had no prior CEO experience. KickStart Specialists facilitated the changeover by initially working with both leaders to support the transition. Through coaching, the new CEO developed a 100-day plan upon placement in her new role. KickStart Specialists worked with Family Lifeline to assess and re-baseline where the organization was culturally, including employee satisfaction. Working with KickStart Specialists, the CEO developed a new culture model that ultimately provided the foundational stability needed for staff to get through the pandemic with minimal negative impact. Executive coaching enabled the CEO to gain confidence in her role leading to successfully meeting/exceeding her organizational goals, despite challenging pandemic circumstances. Most recently, KickStart Specialists facilitated a performance management assessment of the CEO that included a 360-degree feedback from staff and other stakeholders. The CEO received outstanding feedback and has been highly regarded in her role from the onset. Dates of service: November 2019-present

K. Experience

Provide Curriculum vitae, Resumes or capabilities statement for all personnel that may be assigned to the University. Include relevant experience or certifications. You may attach additional pages.

We are delighted to present the following coaches and consultants to be assigned to VCU's executive coaching and development initiative. KickStart Specialists has a broad contractor base with industry best experience featuring a wide variety of partnerships including small and large companies, non-profits, universities, hospitals, state agencies, and municipalities. Pairing KickStart Specialists' experienced and talented resources (skill, fit for client culture, experience, availability) ensures VCU clients are getting the highest level of quality and dedication.

Resumes for each person are included as additional pages (see Appendix A). Upon receipt of award, a web page will be provided to identify the coaches who will serve VCU, including a headshot, a brief description of specialties, and certifications so VCU faculty and staff can easily learn more about our coaches in order to make an informed decision about their "right-fit" coach. Additionally, a table summarizing each person's role and certifications is included.

REDACTED

REDACTED

REDACTED

Summary Table of Roles and Certifications:

Name	Role	Certifications
Kate Foster	Executive Coach, Consultant	<ul style="list-style-type: none"> ▪ New Agreements Coaching Certification (affiliated with ICF) ▪ SIM Leadership Cert.
Bob Riley	Executive Coach, Consultant	<ul style="list-style-type: none"> ▪ Coach Training Alliance Certified Coach (ICF) ▪ Certified Human Behavior Consultant – Uniquely You
Melissa Curtin	Executive Coach, Consultant	<ul style="list-style-type: none"> ▪ The New Agreements Coach Certification (affiliated with ICF) ▪ Martha Beck Life Coaching Certification ▪ Leadership Metro Richmond ▪ Emergenetics
Dan Riegel	Executive Coach, Consultant	<ul style="list-style-type: none"> ▪ MBA - Finance
Anne Chamberlain	Executive Coach, Consultant	<ul style="list-style-type: none"> ▪ Mindfulness Instructor certification ▪ MBTI (Myers-Briggs)
Andre Minns	Leadership Coach, Consultant	<ul style="list-style-type: none"> ▪ Coach Training Alliance Certified Coach (ICF)
Ujwala Warek	Leadership Coach, Consultant	<ul style="list-style-type: none"> ▪ Leadership Coaching for Organizational Performance ▪ Women’s Leadership Forum ▪ Negotiation and Leadership ▪ Venture Capital Executive
Deb Starkey	Leadership Coach, Consultant	<ul style="list-style-type: none"> ▪ ICan Institute Coaching Certification
Wendi Pannell	Consultant	<ul style="list-style-type: none"> ▪ Project Management Professional (PMP)
Kathy Geffen	Consultant	<ul style="list-style-type: none"> ▪ Prosci Certified Change Management
Jason McNair	Consultant	<ul style="list-style-type: none"> ▪ MBTI (Myers-Briggs) ▪ Real Colors
Dana Felts	Operations Manager	<ul style="list-style-type: none"> ▪ MPA

L. Other**Provide any other information the University should consider in evaluating the firm's proposal:**

KickStart Specialists helps organizations ramp up their team effectiveness and productivity by providing custom, business value-driven, fun learning experiences. We leverage our facilitation skills and creative problem-solving abilities to provide 1) group and individual coaching, 2) profiling and assessments, 3) training and workshops, and 4) professional consultation to help individuals and teams grow their leadership skills and capabilities.

It is our goal to provide superior solutions that will completely support your objectives and that will KickStart your employees into success. Because we are small, we can be nimble, flexible, and responsive to your needs. Our executive coaching services are custom tailored to the needs of each individual being coached, utilizing the experience of the assigned coach. We leverage different feedback mechanisms such as individual self-assessment, 360° feedback, and other instruments as needed to help

define the client's areas of opportunity and measure growth. In response to VCU's need for development services, our workshops and training sessions are well designed, energizing, and are customized to your specific needs. An in depth description of our coaching, assessment approach, and training/workshops focused on leadership development is described in greater detail.

A. COACHING SERVICES:

KickStart Specialists provides both individual leadership coaching services as well as team or group coaching services. All of our coaches have a minimum of 3 years of coaching experience before they can take on clients at the middle management level and at least 5 years of experience before coaching at an executive level. Most of our coaches have over 10 years of coaching experience. See "Section K. Experience" for a list of individual certifications and relevant experience.

Our coaching clients cross a multitude of industries and leadership levels. We pride ourselves on the diversity of our clients and immerse ourselves into the culture of the organization we are working with to make sure we are both relatable and practical when working with our clientele. One hundred percent of our coaching clients have come to us via word of mouth and we have grown tremendously over the years with little to no marketing.

Our client challenges are diverse with varying degrees of impact. Some challenges impact just the individual, while other can impact entire departments or organizations. Here are a few of the challenges that we have helped clients (individuals and/or teams) overcome:

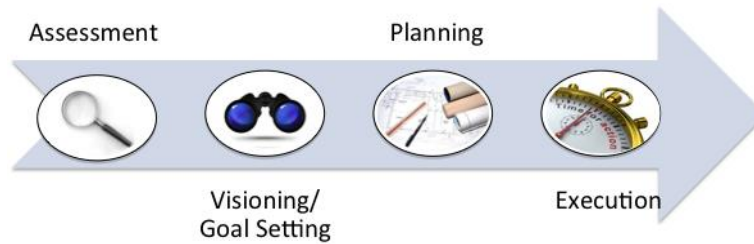
- Organizational mergers
- Dysfunction/poor performance
- New leadership
- Poor culture/no culture
- Overwhelm
- Unclear direction/strategy
- Individual leadership presence
- Poor communication
- Performance improvement
- Rapid growth with lack of infrastructure
- Broken trust
- Fallout from the pandemic – high turnover, disgruntled staff, quiet-quitting, lack of motivation
- Career development
- Lack of confidence/experience

Most of our coaching sessions are in-person either at the client's office, our offices or sometimes outside locations depending on the sensitivity and preference of the client. We do also offer virtual Zoom sessions for clients who prefer it for any reason. All sessions are strictly confidential.

Our Coaching Approach

KickStart Specialists, LLC will provide a customized leadership coaching approach to help individuals or teams take full advantage of their leadership abilities and to develop their influence and leadership presence.

The diagram below summarizes the high-level flow that executive/leadership coaching engagements follow, beginning with the initial input gathering and assessment of the current situation. The flow continues into desired state visioning and goal-setting, then planning of action steps, and finally to executing against action steps and measuring results.



Coaching Deliverables

KickStart Specialists will ensure the development of the following deliverables during the course of the coaching engagement:

1. **KEY DEVELOPMENT ITEMS** – these specific points for the client’s development will be used to drive the outcomes of the coaching, and will form the basis for evaluating the effectiveness of the coaching assignment.
2. **ONE-ON-ONE CONFIDENTIAL MEETINGS** – the client will schedule and participate in individual confidential coaching sessions with KickStart Specialists lasting from 60 to 90 minutes. Meetings will take place at client’s office or a mutually agreeable location. In addition, throughout the duration of this program, the client will have access to their coach by phone or email for any questions or support needed. The coach will not share the content of private coaching sessions unless approval in advance is obtained from the client.
3. **ASSESSMENT INSTRUMENTS** – the coach and client may choose to utilize one or more of the following tools (or others) to assist in increasing self-awareness and understanding of leadership preferences:
 - a) Listening Skills Profile
 - b) DISC Assessment and Report
 - c) 360 Feedback
 - d) Emotional Intelligence
 - e) Wheel of Leadership (KickStart original)
 - f) CliftonStrengths
 - g) Videotaping for feedback on style and delivery
 - h) One meeting where coach shadows client
 - i) Stakeholder surveys or interviews for input and anonymous feedback

Once an assessment tool is chosen, the coach will provide the instrument, administer the assessment, provide feedback in a timely manner to the client, and recommend and conduct follow-up steps as necessary. There may be additional fees associated with use of assessment instruments, and these fees will be approved prior to being administered.

4. **STRATEGIC DEVELOPMENT PLAN** – a key deliverable of the engagement is the creation a strategic professional development plan (PDP) by the client. Client will develop SMART (Specific, Measurable, Attainable, Realistic & Timely) goals as part of the development plan. This PDP will result from interactions around key development points combined with results of assessments and feedback received. The PDP will also act as reinforcement of developing strengths, and will

serve as a roadmap for client's future growth as a leader. At the conclusion of the engagement, a completion meeting may be held where client will present his/her ongoing PDP to their manager.

5. ASSIGNMENTS – client will have assignments designed to help practice new behaviors, skills, and techniques. Applying skills in selected situations and with selected people will help to make each developing skill more natural to the client and more visible to others. During the engagement, an in-person conference may be held with client, manager, and coach to share perceptions and assess, support, and sustain progress.
6. COACHING JOURNAL (OPTIONAL, BUT RECOMMENDED) – the coach will ask that the client create and maintain a coaching journal for the length of the engagement. This will provide a log to capture reactions, observations, and questions that may arise. It will act as a repository for successes in leadership growth, and will ultimately will be a great resource guide for the future.
7. FINAL REPORT (OPTIONAL, BUT RECOMMENDED) – client will write a brief final report on the effectiveness of the engagement from their own perspective. This report should cover all the Key Development Points and their evaluation of the total coaching engagement.

The ongoing frequency of coaching an individual or group depends on the goals and key development plans of those individuals. Our coaching engagements are recommended to be held weekly or every two weeks, though some opt for other frequencies that fit their schedules. We have had ongoing coaching engagements that continue for many months, while other clients meet their goals and may schedule periodic check-ins or graduate from coaching altogether.

B. ASSESSMENTS:

KickStart Specialists loves to use assessment tools, either as standalone usage, to support workshops or team building events, or in conjunction with coaching services. Assessments are a great way for clients to be able to baseline (typically quantitatively) where they currently are. The data from the assessment provides them with context around a situation and can serve as a foundation for improvement. We have access to and work with vendors to provide a multitude of 3rd party assessments but are also known for creating our own, as a situation may warrant.

Our Assessment Approach

Assessment services methodology is straight-forward, with needs identification and validation being the first step, then selection and set up of the assessment service itself (along with generated reports), education around the tool or assessment service results, and finally recommendations on next steps. At KickStart Specialists we pride ourselves on providing recommendations and solutions that are results-oriented and that do not just address symptoms, but rather focus on the real issue or situation. As needed, we recommend conducting the assessment process on a regular basis to monitor progress and measure those results.



Popular Assessment Tools

A full listing of our assessment tools and a brief description of each can be found in “Section H. Fees.” Below is a listing of some of our more popular assessment tools used during workshops, team building activities, or coaching engagements:

- a) Listening Skills Profile
- b) DISC Assessment and Report
- c) 360 Feedback
- d) Emotional Intelligence
- e) Wheel of Leadership (KickStart original)
- f) CliftonStrengths
- g) Emergenetics
- h) Videotaping for feedback on style and delivery
- i) One meeting where coach shadows client
- j) Stakeholder surveys or interviews for input and anonymous feedback (custom)

C. OTHER LEADERSHIP DEVELOPMENT SERVICES – TRAINING & WORKSHOPS:

We are excited to present a description of our leadership development trainings and workshops in response to VCU’s RFP requesting other development services. We believe that leaders need training, and that training should never be boring. In fact, when it comes to education, action speaks louder than words. During our leadership trainings and workshops, we provide enough content to serve as the basis for learning, but the real learning is accomplished through group dialogue and team building activities. We have skilled facilitators who can provide over 30 course offerings focused on assisting both emerging and experienced leaders.

Our approach to providing training and facilitation services begins with some key beliefs/priorities as outlined below:

Inclusion. We value each individual participant in our trainings, and we recognize each person's unique style of learning and communication needs. Leadership is both an art and a science. Our goal is to accommodate everyone's perspective and input in order to create a culture of inclusion within the training courses. That culture of inclusion can then serve as a model for participants as they navigate their own leadership journey.

Communication is key. Our trainings offer numerous opportunities for small and large group discussion and sharing of success stories, techniques, and lessons learned. We seek to foster a "safe room" concept within our trainings and workshops, and encourage appropriate sharing of experiences.

Trust is essential. We believe that trust is an essential part of learning, and we aspire to create open forums where individuals can learn, share, question, and give their perspective on leadership topics. To develop trust among participants, we create opportunities to get to know, understand, and appreciate each other's similarities and differences, and to be vulnerable with each other. Trust is the foundation of good leadership and of effective training and teamwork.

Variety in instructional methods. Our belief is that adults learn best when the environment is open, the messages are clear, instructional methods are diverse, and instructors bring fun and establish strong rapport with participants. We utilize several forms of multi-media in our trainings and workshops, including audio and video clips, interactive small group sessions, presentations using PowerPoint slides, experiential learning activities with custom debriefs, and games and quizzes to test knowledge and retention. We always encourage the use of personal action plans and takeaway materials to reinforce the learning after the course.

Experiential Learning. We utilize experiential team building activities and exercises that appear to be games, but in reality tie directly back to the leadership topics being taught. Our skilled facilitators enhance the experience by allowing time for reflection and conducting in-depth debriefs after the activities are completed. Many of the activities provide an opportunity for participants to lead, and to get feedback on their leadership effectiveness in a low-risk learning environment. This also gets leaders accustomed to performing after-action reviews to get feedback on what went well, and what could be improved next time. Individuals get to know each other on a social level while working together to solve team challenges. This experience enhances working relationships as individuals begin to open up and trust each other more. We always tailor the experiential learning activities and structured debriefs to the learning objectives of each training course, and tie the learning back to work in an Action-Reflection model.

Assessments. We encourage the use of online assessments for several of our workshops to give participants a sense of where they stand in their current leadership abilities and skills. These assessments are completed in advance of the course such as DISC and CliftonStrengths.

Individual Action Plans. We provide opportunities at the end of each workshop for participants to create their own individual action plans related to the course material. These items are for personal use only, and helps participants focus on one or two key development points following the training.

We recognize that organizations have different needs, and that is why we have a variety of workshops and training courses to empower organizations and individuals. We've partnered with organizations to offer one or two trainings, but also have assisted organizations (like the City of Chesapeake, City of Newport News) in developing and facilitating courses as part of a leadership development training program. In the leadership development programs, a cohort of emerging or experienced leaders complete a series of courses (virtually or in-person) while learning and developing together. We have received positive feedback that this has improved team cohesiveness and strengthened the organization overall as participants acquire skills together and develop relationships and a support network throughout the organization. Many of our clients have started with a few of our training courses, but have expanded courses over time.

Staying on top of current challenges and trends in organizational behavior is crucial as the world continues to evolve, especially post pandemic. KickStart Specialists prides itself on staying abreast of trends in order to keep our material relatable to the current workplace environment. For example, we have trainings focused on "Leading Those Working Remotely" and "Managing Diversity: Generations" which focuses on diversity related to generational age gaps in order to strengthen teams. Our course catalogue includes over 30 course offerings covering a wide range of topics for leaders. We would be happy to provide a complete listing and description of our entire training course catalogue to VCU upon request.

Thank you for the opportunity to submit our proposal for this important executive leadership and development services initiative. We look forward to helping VCU discover, create, and grow leaders as you continue the drive towards implementing your strategic plan, Quest 2028: One VCU Together We Transform.

2. eVirginia (eVA) Registration Status

- A. Is Contractor currently eVA registered and active: Yes No

3. Small, Women, and Minority Owned Business Information: (Complete A-G)

- A. Small: Yes No
- B. Minority-Owned: Yes No
- B. Women-Owned: Yes No
- D. Virginia DSBSD Certified: Yes No
- G. Virginia DSBSD Certification #: 698298

4. Conditions of Award

Please check each box below confirming agreement with the conditions of award. Terms that contain a check box must be checked to confirm acceptance.

A. RealSource Registration

- The Contractor agrees to maintain or become registered as a vendor within the VCU RealSource Vendor Registration network upon being invited to register.

B. Detailed Scope of Work

- The Contractor will provide a detailed statement of work prior to any project, summarizing specific services, deliverables, delivery dates and cost – without additional terms or conditions requiring VCU signature. VCU has a signatory authority policy that allows only specified individuals to sign contracts.

C. Purchase Orders

- The Contractor will accept a VCU issued Purchase Order as the commitment to start a project and will not start work on a project until a Purchase Order is received.

D. Invoicing

- The Contractor agrees to invoice in accordance with the procedures outlined on the VCU Purchase Order.

E. Payment Method (Check the box AND select an option from the dropdown)

VCU is migrating away from processing payments via paper check and strongly encourages the use of our electronic payment options.

- ACH - Paymode-X Basic (Net 35) and Early Payment Discount (EPD)

F. Early Payment Discount (EPD): (Check the box AND select an option from the dropdown)

- 2.0% Net 15/ Net 30

G. Experience

- 1. Contractor has a least 4 years of experience.

- Yes
- No

- 2. Contractor has worked with clients in the higher education sector.

- Yes
 No
- 3. Contractor has experience providing coaching and development services to employees at several levels of an organization.
- Yes
 No
- 4. Contractor has experience providing coaching and development services in a variety of formats, including workshops, seminars, and one-on-one coaching.
- Yes
 No
- 5. Contractor has experience working with virtual teams and providing virtual coaching and development services.
- Yes
 No

H. Fees

The following pricing / fees will be charged for the Services. The fee structure includes rates charged for all personnel or service that may be provided to VCU.

We are pleased to offer significant discounts on coaching sessions based upon the number of coaching sessions purchased and offer both monthly subscriptions (renewed automatically) and bundled discount rates.

Individual Coaching Rates for VCU Mid-level Manager/Individual

VCU Mid-level Manager/Individual				
	Per Session - 1 hr	25% Discount - Monthly Subscription (4x/month)	20% Discount - Monthly Subscription (2x/month)	10% Discount - Bundles of 6 (used within 3 months)
Executive Coach	\$300	\$900 total (\$225/session)	\$480 total (\$240/session)	\$1,620 total (\$270/session)
Coach	\$260	\$780 total (\$195/session)	\$416 total (\$208/session)	\$1,404 total (\$234/session)

Individual Coaching Rates for VCU Director Level (or above)

VCU Director Level (or above)				
	Per Session - 1 hr	25% Discount - Monthly Subscription (4x/month)	20% Discount - Monthly Subscription (2x/month)	10% Discount - Bundles of 6 (used within 3 months)
Executive Coach	\$360	\$1,080 total (\$270/session)	\$576 total (\$288/session)	\$1,944 total = (\$324/session)

Group Coaching Rates

Group Coaching - Up to 10 participants/group				
	Per Session - 1.5 hr	25% Discount - Monthly Subscription (4x/month)	20% Discount - Monthly Subscription (2x/month)	10% Discount - Bundles of 6 (used within 3 months)
Group Coaching	\$750 <i>Hourly rate beyond initial session - \$400 per hour</i>	\$2,250 total (\$563/session)	\$1,200 total (\$600/session)	\$4,050 total (\$675/session)

Assessment Tools

Assessment Tool	Description	Cost per person
Uniquely You DISC Assessment	<p>A DISC assessment is a behavior-assessment tool that aims to help people understand their leadership styles and improve workplace teamwork and communication.</p> <p>Price includes: administration, online assessment, and individual report.</p> <p>Recommend: DISC overview session and interpretation of results. Priced separately.</p>	\$20
Everything DiSC Workplace Profile	<p>A DiSC assessment is a behavior-assessment tool that aims to help people understand their leadership styles and improve workplace teamwork and communication. This DISC profile provides a more comprehensive report for users, and options for additional free reports such as Team View Reports and Comparison Reports.</p> <p>Price includes: administration, online assessment and individual report.</p> <p>Recommend: DISC overview session and interpretation of results. Priced separately.</p>	\$80
DiSC Group Culture Report	<p>The report shows the entire group with analysis of the team's culture from a DISC perspective. Includes each unique dot point location in a poster view. Used in conjunction with Everything DISC Workplace.</p>	\$125
CliftonStrengths	<p>The CliftonStrengths assessment is a performance-based tool that builds self-awareness and strength. This assessment goes beyond general definitions of your personal traits and digs into how specific strengths can be cultivated.</p> <p>Price includes: administration, online assessment, and</p>	\$70

Assessment Tool	Description	Cost per person
	<p>individual report of all 34 strengths.</p> <p>Strengths Grid - \$50.</p> <p>Recommend: Strengths overview session and interpretation of results. Priced separately.</p>	
EQ-i 2.0 Leadership Report	<p>The Leadership Report is a powerful assessment for leadership development, <u>executive development</u> and coaching, and developing high potential leaders. It examines results through four key dimensions for high performance leaders.</p> <p>Price includes: Administration, online assessment and report.</p> <p>Recommend: Overview session and interpretation of results. Priced separately.</p>	\$200
EQ-I 2.0 Workplace Report	<p>The Workplace Report is an employee personality assessment and test designed to be used in coaching and development situations for an individual at a <u>non-management level</u>. It helps coaches focus on the impact of emotional intelligence at work, and offers suggestions for working more effectively in the role with colleagues, supervisors and clients.</p> <p>Price includes: administration, online assessment and report.</p> <p>Recommend: Overview session and interpretation of results. Priced separately.</p>	\$140
EQ 2.0 360 Leadership	<p>The Complete Employee Evaluation Toolkit is used to measure performance & help leaders grow. Discover the best about a leader's strengths and weaknesses for quick wins.</p> <p>Price includes: administration, compiled report of all raters' responses.</p> <p>Recommend: 1:1 overview session and interpretation of results. Priced separately.</p>	\$499 (total price - includes as many responders as client would like)
Culture Survey	<p>A Culture Audit is a systematic approach to understanding the current state of an organization's culture and creating a roadmap to achieve a desired future state.</p> <p>Price includes: development of custom survey, administration, analysis of results, one-on-one confidential interviews of up to 30 staff, report of themes and recommended action steps.</p>	All inclusive culture survey of 250 staff would be \$2,500 (price can be scaled based on size)

Assessment Tool	Description	Cost per person
	<p>Recommend: Overview session and interpretation of results. Priced separately.</p>	
Employee Engagement Survey	<p>The Employee Engagement Survey is custom designed to measure and assess how motivated and engaged your employees are to perform their best at work each day. From these surveys, you can gain insight into employees' thoughts and attitudes towards their work and the overall environment. Typically done at an organizational level.</p> <p>Price includes: development of custom survey, administration, analysis of results, one-on-one confidential interviews of up to 30 staff, report of themes and recommended action steps.</p> <p>Recommend: Overview session and interpretation of results. Priced separately.</p>	All inclusive engagement survey of 250 staff would be \$2,500 (price can be scaled based on size)
Myers-Briggs Type Indicator	<p>The MBTI® Profile provides a succinct summary of your MBTI results. It provides an individual's reported type, brief descriptions of the preferences, characteristics frequently associated with the type, and an easy-to-read graph displaying his or her preference clarity indexes.</p> <p>Price includes: administration, online assessment and graph.</p> <p>Recommend: MBTI overview session and interpretation of results. Priced separately.</p>	\$50
Emergenetics Assessment	<p>The Emergenetics® Profile psychometric test measures patterns of Thinking and Behaving that emerge from your genetic blue-print and life experiences. Unlike other profiles that merge the patterns into four areas, Emergenetics measures individual preferences over seven attributes.</p> <p>Price includes: administration, online assessment and report.</p> <p>Recommend: 1:1 overview session and interpretation of results. Priced separately.</p>	\$155
Team Effectiveness Survey	<p>This custom Team Effectiveness survey uses inward feedback to help teams understand how productivity, cohesion, and alignment are driving their overall success.</p> <p>Price includes: custom development of survey, administration, capture of results, report of summary themes and recommended action steps.</p>	<p>Up to 15 staff - \$1,500.</p> <p>Each additional person beyond initial 15 - add \$20pp.</p> <p>Pricing examples:</p> <ul style="list-style-type: none"> Group of 30 staff members =

Assessment Tool	Description	Cost per person
		\$1,800; <ul style="list-style-type: none"> • 50 participants = \$2,200; • 100 participants = \$3,200; • 200 participants = \$5,200.
Stakeholder Interviews	Custom-developed 20-minute interviews with key stakeholders that help determine the overall health of the organization, including trends, challenges and things that are going well. Price includes: summarized report of findings with improvement recommendations.	\$175
Wheel of Leadership	A KickStart Specialists original. This tool helps leaders to consider 8 specific areas of leadership and what success in each area looks like. Raters will self-assess where they feel they currently are in each area. This tool helps identify areas for leadership development and serves as a barometer for measuring progress. Price includes: self-assessment tool and 30-minute instruction session to provide direction on completing the assessment. Recommend: 1:1 coaching session afterwards to interpret results. (Used exclusively with coaching engagements).	\$100
Real Colors	Real Colors is a four-color personality assessment designed to help people better understand themselves and each other. It creates a common language that helps improve communication and create an environment in which everyone's motivations and perspectives are better understood. Price includes: administration, online assessment and individual score. Recommend: Real Colors overview session and interpretation of results. Priced separately.	\$30

Training Courses/Workshops - We offer over 30 different training courses which can be customized for length of time, number of participants, and assessment tools utilized. If multiple trainings are offered, individual training courses may be discounted. It is recommended that training is conducted with a minimum of 4 hours.

Training/Workshop	Session length	Cost for up to 25 Participants
Workshop only	2-Hour Session	\$2,000
Training or Workshop	4-Hour Session	\$3,500
Training or Workshop	8-Hour Session	\$6,000

Workshop/Training Sessions Includes:

- 2 Professional Facilitators & Logistics support
- Session design & preparation (up to 3 hours). If a customized session requires additional design or preparation, our planning rates are \$300/hour
- Presentation
- Interactive activities/discussion
- Personal action plans
- Question and answer segment
- Assessment tools will be priced separately, if required (see Assessment Tools for rates)
- Mileage to and from location within the greater Richmond metro area

Some of our trainings and workshops can be customizable to include larger groups.

The rates above are for in-person trainings/workshops and may be adjusted for virtual or hybrid sessions.

VCU prefers fully loaded rates inclusive of travel and expenses. If travel and expenses must be charged separately, the Contractor must receive written approval from VCU before initiating travel to any VCU campus or location. For travel that is approved in writing by VCU, Contractor shall submit its reasonable out-of-pocket expenses to VCU. Travel expenses must be clearly documented in the form of receipts. VCU shall reimburse Contractor for its reasonable out-of-pocket expenses in accordance with, and limited by, the VCU Travel Guidelines & Procedures. VCU reserves the right to dispute the reasonableness of, and reject, any travel expense. Contractor shall adhere to VCU's current guidance for on-campus visits available at <https://together.vcu.edu/>

5. Proprietary or Confidential Information:

- A. The Contractor's proposal contains proprietary or confidential information.: Yes No
- B. If Contractor answered "Yes" above, provide additional details.

Click or tap here to enter text.

Note: See RFP, Section "Confidential / Proprietary Data and Information" for more information.

6. Acceptance

This document will be incorporated into the Master Services Agreement (MSA) between your Firm and the VCU. The contract between your Firm and VCU may include statements of work, a data protection addendum, or other similar documents as necessary. The MSA will have precedence over all other contract documents.

Contractor Name: KickStart Specialists, LLC

Authorized Officer/Signatory: Kate Foster

Title: Principal

Authorized Officer/Signatory Email Address: kfoster@kickstartspecialists.com

Date: 10/16/2023

- Electronic Signature:** By typing the name of the firm's authorized representative/signatory into the field above, the firm certifies that it is providing a binding "Electronic Signature" and further specifically validates that the individual affixing the Electronic Signature below is fully authorized to bind the firm with respect to the goods, services, pricing, terms and conditions listed herein. **No award will be made without a fully executed MSA.**