

SAN DIEGO CONVENTION CENTER CORPORATION

REQUEST FOR PROPOSALS FOR EXECUTIVE COACHING SERVICES RFP #25-1049

Issue Date:	August 30, 2024
Pre-Bid Question Deadline:	September 18, 2024 at 5:00 p.m. local time
Responses to Pre-Bid Questions:	September 25, 2024 at 5:00 p.m. local time
Bid Deadline:	October 4, 2024 at 5:00 p.m. local time San Diego Convention Center Corporation Procurement Department Send bids to: shane.young@visitsandiego.com
Bid Evaluation Period:	October 7, 2024 – October 18, 2024
Shortlist Interviews:	October 24, 2024 – October 30, 2024
Final Evaluation:	October 31, 2024
Notice of Intent to Award: (contingent on approvals)	November 1, 2024
Contract Commencement:	December 2, 2024
Procurement Contact:	Shane Young, Procurement Manager E-Mail: shane.young@visitsandiego.com Phone: (619) 782-4392

Description: The San Diego Convention Center Corporation (“Corporation”) seeks to engage a qualified leadership coaching firm (“Consultant”) to provide comprehensive coaching services (“Services”) for Corporation’s C-Suite executives (CEO, COO, CFO). For more details on the scope of services, see Section 2 – Scope of Services.

Any addendum issued for this RFP can be found at: <https://www.visitsandiego.com/procurement>

Written questions regarding the substance of the RFP must be submitted via e-mail to the procurement contact listed above no later than the Pre-Bid Question Deadline indicated above. E-mailed Bids are due prior to the Bid Deadline indicated above and must be delivered to shane.young@visitsandiego.com. Late bids will not be accepted – NO EXCEPTIONS.

PROCUREMENT REQUIREMENTS

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Section 1 – Instructions & General Conditions

1. **COMMUNICATIONS:** All communications, any modifications, clarifications, amendments, questions, responses, or any other matters related to the Request for Proposal (RFP) must be made only through the Procurement Contact noted on the cover of this RFP, or their designee. A violation of this provision is cause for the Corporation to reject a company's bid. No contact regarding this document with other Corporation employees is permitted and may be grounds for disqualification.
2. **PRE-BID INFORMATION AND QUESTIONS:** Each bid that is timely received will be evaluated on its merit and for completeness of all requested information. In preparing bids, Bidders are advised to rely only upon the contents of this RFP and accompanying documents, and any written clarifications or addenda issued by the Corporation. If a Bidder finds a discrepancy, error, or omission in the RFP package, or requires any written addendum thereto, the Bidder is requested to notify the Procurement Contact noted on the cover of this RFP, so that written clarification may be sent to all prospective Bidders. All questions must be submitted in writing to the Procurement Contact before the Pre-Bid Question Deadline indicated on the front of this document. All answers will be issued in the form of a written addendum.
3. **PRE-BID MEETING:** There is no pre-bid meeting for this RFP.
4. **RFP MODIFICATIONS:** Clarifications, modifications, or amendments may be made to the RFP at any time prior to the Bid Deadline at the discretion of the Corporation. It is the Bidder's responsibility to periodically check the Corporation's website at <https://www.visitsandiego.com/procurement> until the posted Bid Deadline to obtain any issued addenda.
5. **BID SUBMISSION:** Submit offer on the Bid Form provided. Bidders are required to complete the entire Bid Form and supplements (if applicable).
 - a. Bids must be submitted to the Procurement Department, San Diego Convention Center Corporation, by **e-mail** to shane.young@visitsandiego.com, before the date and time indicated as the deadline. It is each Bidder's sole responsibility to ensure the Procurement Department receives the bid prior to the Bid Deadline.
 - b. Submission of a bid establishes a conclusive presumption that the Bidder is thoroughly familiar with the Request for Proposal (RFP) and that the Bidder understands and agrees to abide by each and all of the stipulations and requirements contained therein.
 - c. All costs incurred in the preparation and presentation of the bid is the Bidder's sole responsibility; no pre-bid costs will be reimbursed to any Bidder. All documentation submitted with the bid will become the property of the Corporation.
 - d. Bids must be held firm for a minimum of 90 days.
6. **EXCEPTIONS:** Bidder shall clearly identify any proposed deviations from the Scope of Services in the Request for Proposal. Each exception must be clearly defined and referenced to the proper paragraph in this RFP. The exception shall include, at a minimum, the Bidder's proposed substitute language and opinion as to why the suggested substitution will provide equivalent or better service and performance. If no exceptions are noted in the Bidder's bid, the Corporation will assume complete conformance with this specification and the successful Bidder will be required to perform accordingly. Bids not meeting all requirements may be rejected.
7. **DUPLICATE BIDS:** No more than one (1) bid from any Bidder, including its subsidiaries, affiliated companies, and franchises will be considered by the Corporation. In the event multiple bids are submitted in violation of this provision, the Corporation will have the right to determine which bid will be considered, or at its sole option, reject all such multiple bids.
8. **REJECTION:** The Corporation reserves the right to reject any or all bids, or to accept or reject any bid in

part, and to waive any minor informality or irregularity in bids received if it is determined by the Director of Procurement and Contracts that the best interest of the Corporation will be served by doing so. A Bidder's failure to provide any additional information requested by the Corporation prior to a consultant selection may result in rejection of the bid. The Corporation may reject any bid from any person, firm, or corporation in arrears or in default to the Corporation on any contract, debt, or other obligation, or if the Bidder is debarred by the Corporation from consideration for a contract award.

9. The Corporation reserves the right to reject all nonconforming, nonresponsive, unbalanced, or conditional Bids. Discrepancies in the multiplication of unit prices and unit prices themselves will be resolved in favor of unit price. Discrepancies between the indicated sum of any column of figures and the correct sum thereof will be resolved in favor of the correct sum.
10. **PROCUREMENT POLICY:** Procurement for the Corporation will be handled in a manner providing fair opportunity to all businesses. This will be accomplished without abrogation or sacrifice of quality and as determined to be in the best interest of the Corporation.
11. **BIDDER EVALUATION:** The Bid will be awarded to the most responsive, responsible Bidder meeting specifications with the highest evaluation score based upon the following criteria:
 - a. **Experience and Expertise – 30%**
 - Experience with C-Suite Executives: Specific experience working with CEOs, COOs, and Deputy CEOs (or equivalent roles), and CFOs, including relevant success stories that demonstrate the firm's ability to manage complex leadership transitions and integrate newly created executive roles.
 - b. **Approach, Methodology, and Sample Deliverables – 20%**
 - Coaching Philosophy: Alignment of the firm's coaching philosophy with Corporation's organization's culture and goals.
 - Customization: Ability to tailor the coaching program to meet the specific needs of Corporation's C-Suite executives, especially in guiding the Deputy CEO & CFO through their transition into the new role.
 - Tools and Techniques: Use of proven tools, techniques, and assessments that support comprehensive leadership development.
 - Sample Deliverables: Evaluation of the quality and information provided within sample deliverables.
 - c. **Proposed Team – 20%**
 - Coach Qualifications: The qualifications, certifications, and experience of the coaches who will be involved in the engagement.
 - Fit with C-Suite: The coach's ability to connect and resonate with Corporation's C-Suite executives.
 - d. **Cost and Value – 15%**
 - Fee Structure: Reasonableness and transparency of the proposed costs, including fees for assessments, coaching sessions, follow-up activities, travel expenses, and any additional services.
 - Value for Money: Evaluation of the overall value provided relative to the cost, considering the scope and quality of services offered.
 - e. **References and Past Performance – 5%**
 - Client References: Feedback from previous clients, especially those with similar organizational structures or who have undergone similar leadership transitions.
 - f. **Shortlist Interview (if shortlisted) – 10%**
 - A sample agenda will be provided to shortlisted candidates after the bid evaluation period.

- 12. NON-DISCRIMINATION:** Corporation will not contract with any person or firm that discriminates against employees or applicants for employment because of any factor not related to job performance. The Bidder must comply with all federal, state, and local laws and policies that prohibit discrimination in employment contracts. The Bidder must include in its subcontracts provisions that prohibit subcontractors from discriminating in their employment practices.
- 13. CONTRACT AWARD:** The Corporation reserves the right to award by item, group of items, or total bid. The Bidder to whom the award is made will be notified at the earliest possible date. After a final award of the Contract by the Corporation, the Consultant must execute and perform said Contract. If, for any reason, a contract is not executed with the selected Bidder within fourteen (14) days after receipt of Contract, then the Corporation may recommend the award to the next qualified Bidder.
- 14. DISQUALIFICATION OF BIDDERS:** Any one or more of the following causes may be considered for the disqualification of a Bidder as non-responsible and the rejection of the Bid:
 - a. Evidence of collusion among Bidders;
 - b. Lack of competency as revealed by either financial, experience, or safety statements;
 - c. Lack of responsibility as shown by past work;
 - d. Uncompleted work under other contracts which, according in the judgment of the Corporation, might hinder or prevent the prompt completion of additional work if needed.
- 15. DISCUSSIONS:** Discussions may be conducted with responsible Bidders, in order to clarify and assure full understanding of, and conformance to, the solicitation requirements. Discussions may be conducted with Bidders who submit bids determined to be reasonably susceptible of being elected for award, but bids may be accepted without such discussions.
- 16.** Bidders shall be accorded fair and equal treatment with respect to any opportunity for discussions and revisions of bids. Such revisions may be permitted after submission and prior to award for the purpose of obtaining best and final offers. If during discussions there is a need for any substantial clarification of or change in the RFP, the RFP shall be amended to incorporate such clarification or change. The Bidder shall reduce any substantial oral clarification of a bid in writing.
- 17.** Nothing contained in the RFP or in the contract shall create or be construed as creating any contractual relationship between subcontractor and the Corporation. The Contract will not be assignable to any other business entity without the Corporation's approval.
- 18. INSURANCE REQUIREMENTS:** At all times during the term of the Contract, the Consultant shall maintain, at their sole expense, insurance coverage for the Consultant, its employees, officers, and independent contractors as follows:

TYPE OF INSURANCE	MINIMUM ACCEPTABLE LIMITS OF LIABILITY
1. Workers Compensation	Statutory
2. Employers Liability	
A. Each Accident	\$1,000,000.00
B. Each Employee-disease	\$1,000,000.00
C. Policy Aggregate-disease	\$1,000,000.00
3. Commercial General Liability	
A. Per Occurrence	\$1,000,000.00
4. Business Auto Liability	\$1,000,000.00

San Diego Convention Center Corporation, Inc., City of San Diego, San Diego Unified Port District, and the members, officers, directors, agents, and employees of each of these three entities shall be named as additional insured.

- 19. SUBCONTRACTORS:** The successful Bidder must identify all subcontractor(s) regardless of the dollar amount or percentage and the services they will provide. The successful Bidder is responsible for all

payments and liabilities of all subcontractor(s). Corporation reserves the right to approve or reject any proposed subcontractor. If the Corporation rejects any proposed subcontractor, the successful Bidder shall be responsible to assume the proposed subcontractor's responsibilities. The successful Bidder may propose another subcontractor if it does not jeopardize the effectiveness or efficiency of the contract.

- 20. DISCLOSURE OF CONTENTS:** All information provided in the bid shall be held in confidence and shall not be revealed or discussed with competitors or the general public, until after award of the contract except as provided by law or court decision.
- 21.** Bidders must make no other distribution of the bids other than authorized by this RFP. A Bidder who shares cost information contained in its bid with other Corporation personnel or competing Bidder's personnel shall be subject to disqualification.
- 22. PUBLIC DISCLOSURE:** Bids are subject to public disclosure after the deadline for submission in accordance with applicable law.
- 23. CONTRACT COMMENCEMENT:** Commencement of a contract shall not begin prior to all necessary Corporation approvals, including Corporation's Board of Directors approval where required, and subsequent execution of the Corporation's Contract. Commencement of a contract without these approvals is solely at the Bidder's own risk and is likely to result in no payment for services performed.

Section 2 – Scope of Services to Follow

Section 2 – Scope of Services

1. **INTRODUCTION:** The San Diego Convention Center Corporation (“Corporation”) seeks to engage a qualified leadership coaching firm (“Consultant”) to provide comprehensive coaching services (“Services”) for Corporation’s C-Suite executives (CEO, COO, CFO). The objective of this engagement is to enhance individual leadership competencies and foster a cohesive and aligned executive team over an engagement of approximately nine (9) months through a period of reorganization, which includes the CEO’s shift to externally focus on community connections while expanding the CFO’s role to strategize and lead the internal business direction.
2. **BACKGROUND:** Corporation is embarking on a critical new phase of growth and strategic development, driven by record-breaking achievements in revenue and overall growth. As the organization prepares to undertake a significant amount of capital renewal projects and navigate increasing expectations from Corporation stakeholders – including the City, Port, San Diego Tourism Authority, Clients, and other key partners – Corporation is restructuring the executive leadership to better support these challenges.

To centralize Corporation’s internal functions and enhance strategic oversight, Corporation is in the process of establishing a new leadership position: Deputy CEO & CFO. This role is intended as a promotion for Corporation’s existing CFO and will be fully developed over the coming months. This role will integrate financial leadership with responsibility for long-term planning and strategic initiatives. In this new structure, the Deputy CEO & CFO will report directly to the CEO, while the COO will now report to the Deputy CEO & CFO.

As part of this transition, each member of Corporation’s C-Suite team brings distinct strengths and faces unique challenges. The CEO is focused on external engagement, including public-facing external affairs, communications, and relationship-building with key stakeholders such as the City of San Diego, Port of San Diego, Coastal Commission, hospitality sector, and downtown business communities.

The COO, who stepped into a newly redefined role just over two years ago, is tasked with developing an engineering and capital projects department and managing all day-to-day operations and business partners. This effort is further complicated by the need to overhaul outdated maintenance programs.

The CFO’s promotion to the dual role of Deputy CEO & CFO marks a significant transition from traditional financial oversight and execution to a broader strategic leadership role. This shift involves moving beyond core financial responsibilities to encompass long-term planning, strategic initiatives, and the centralized management of all internal functions. Supporting this transition is essential for ensuring the organization’s long-term success.

3. **OBJECTIVES:** Corporation’s objectives for this engagement include:
 - a. **Enhance Individual Competencies:** Develop the personal leadership skills and effectiveness of the CEO, COO, and Deputy CEO & CFO.
 - b. **Support Deputy CEO & CFO Transition:** Facilitate a smooth and effective transition for the newly created Deputy CEO & CFO role by developing leadership competencies, clarifying executive roles and responsibilities, and ensuring alignment with the CEO and COO.
 - c. **Foster Executive Alignment:** Build a more cohesive, collaborative, and aligned executive team.
 - d. **Improve Communication:** Provide tools to ensure open, honest, and constructive dialogue.

- e. **Improve Organizational Performance:** Ensure that the C-Suite team's leadership positively impacts the broader organization, leading to improved performance and communication.
- f. **Sustainable Leadership Development:** Create a framework for ongoing leadership development beyond the coaching engagement.

4. SCOPE OF SERVICES: Consultant shall deliver the following services:

a. Initial Assessment

- Conduct comprehensive assessments for each executive to identify strengths, areas for improvement, and specific development needs.
- Utilize tools such as 360-degree feedback, individual interviews, and other assessments as appropriate.

b. Individual Coaching

- Provide one-on-one coaching sessions tailored to the unique needs of the CEO, COO, and newly created Deputy CEO & CFO.
- Focus on developing key leadership competencies such as:
 - Effective Communication
 - Collaboration and Team Building
 - Stakeholder Management
 - Strategic Thinking and Vision
 - Decision-Making and Problem-Solving
 - Emotional Intelligence
 - Leadership Presence and Influence
 - Change Management
 - Conflict Resolution
 - Innovation and Creativity
 - Resilience and Stress Management

c. Development of Action Plans

- Collaborate with each executive to create personalized development plans with specific measurable goals. Each personalized development plan should be completed within the first thirty (30) days of the engagement. These plans should include short-term (3-month), mid-term (6-month), and long-term (12+-month) goals with corresponding milestones.
- Develop a collective action plan to address shared challenges and enhance overall team effectiveness. The collective action plan should be developed within the first forty-five (45) days of the engagement and include milestones for evaluating progress and making adjustments. The plan should be designed to address immediate challenges while setting a foundation for long-term team cohesion and effectiveness.

d. Follow-Up and Evaluation

- Conduct regular follow-up sessions to monitor progress and provide ongoing support.
- Provide feedback and progress reports to the chair of the Board of Directors or their designee, ensuring transparency and alignment with the board's expectations.

- Use performance metrics and feedback mechanisms to evaluate the impact of the coaching program.

5. DELIVERABLES: Consultant shall produce and deliver:

- Assessment Reports:** Detailed reports summarizing initial assessment findings for each executive.
- Individual Development Plans:** Customized development plans for the CEO, COO, and Deputy CEO & CFO with specific goals and timelines.
- Progress Reports:** Regular updates on the coaching program's progress, including achievements and areas requiring further attention. Copies will be provided to staff and the chair of the Board of Directors or their designee.
- Final Evaluation Report:** A summary report evaluating the overall impact of the coaching engagement, with recommendations for ongoing development. Copies will be provided to staff and the chair of the Board of Directors or their designee.

6. MEASUREMENTS AND METRICS: Success will be measured using:

- Leadership Assessments:** Improvement in leadership competency scores based on pre- and post-coaching assessments.
- Employee Satisfaction:** Increased employee satisfaction and engagement scores, particularly regarding perceptions of leadership.
- Executive Alignment:** Enhanced alignment and collaboration within the executive team, measured through feedback and performance metrics.
- Achievement of Goals:** Progress toward and achievement of individual and collective goals outlined in the development plans.
- Feedback from Stakeholders:** Positive feedback from board members, direct reports, and other key stakeholders regarding the coaching's impact.

Section 3 – Bid Form to Follow

Section 3 – Bid Form

Failure to complete this form in its entirety may result in your Bid being deemed non-responsive.

BIDDER:

Legal Business Name _____

Other Entity Name(s) (if applicable) _____

Primary Contact Name _____

Primary Contact Position _____

Primary Contact Phone Number _____

Primary Contact E-mail _____

COST PROPOSAL: (attach with Bid Form)

Submit a cost proposal that includes:

- Fee Structure: Detailed breakdown of the costs associated with the engagement, including fees for assessments, coaching sessions, follow-up activities, travel expenses (if applicable), and any additional services.
- Payment Schedule: Proposed payment schedule, including any upfront fees, milestone payments, final payment, and prompt payment discount details (if applicable).
- Out-of-Scope Rate Sheet: While the primary engagement is envisioned to last approximately 9 months, there may be opportunities for Consultant to provide ongoing support on an as-needed basis after this period. Bidders are encouraged to include options for extended or ad-hoc services in their Cost Proposal.

COMPANY RESUME: (attach with Bid Form)

Submit a company resume that includes:

- Background Information: A brief history of the firm, including years in business and areas of expertise.
- Coach Bios: Detailed biographies of the coach(es) who will be involved, including their qualifications, experience, and areas of expertise.
- Coach Certifications: Information on relevant certifications and professional affiliations.
- Experience with C-Suite: Specific examples of their experience working with CEOs, COOs, and CFOs, including any relevant success stories that demonstrate their ability to address the complexities of these positions.

WORK PLAN, APPROACH, AND METHODOLOGY: (attach with Bid Form)

Submit a work plan that includes:

- Timeline: Proposed timeline for the engagement (anticipated to be approximately 9-months), including key milestones and deliverables.
- Session Structure: Details on the frequency, duration, and format of the coaching sessions (e.g., in-person, virtual).
- Assessment Plan: Explanation of the assessment process, including the tools used and the feedback mechanisms in place.
- Coaching Philosophy: Description of the firm's coaching philosophy and approach.
- Coaching Process: Detailed explanation of the proposed process, including initial assessments, individual coaching sessions, and follow-up activities.

TO: CORPORATION:

The Undersigned hereby offers and agrees to furnish the goods and/or services in compliance with all terms, scope of services, conditions, specifications, and addenda in the Request for Proposal.

BIDDER QUALIFICATION STATEMENT:

The following statements of experience, personnel, and general qualifications of the Bidder are submitted with the assurance that the Corporation can rely on its accuracy and truthfulness.

ADDENDA:

The undersigned has read, understands and is fully cognizant of the Instruction, Scope of Services, Bid Form, all Exhibits thereto, and all contents of this document, together with any written addenda issued in connection with any of the above. The undersigned hereby acknowledges receipt of the following addenda: _____, _____, _____, _____ (write "none" if none). In addition, the undersigned has completely and appropriately filled out all required forms.

COMPLIANCE:

The undersigned hereby accepts all administrative requirements of the RFP and will be in compliance with such requirements. By submitting this Bid Form, the Bidder represents that: 1) the Bidder is in compliance with any applicable ethics provisions of the Corporation's RFP, and 2) if awarded a contract to provide the goods or services required in the RFP, the Bidder will comply with the Corporation's standards outlined in this RFP.

NON-COLLUSION:

The undersigned, by submission of this Bid Form, hereby declares that this Bid is made without collusion with any other person, firm, or corporation.

INSURANCES:

The undersigned further agrees that if awarded the Contract, it will submit to the Corporation any required evidence of required insurance coverage within 14 business days after acceptance of this bid.

FROM:

Respondent's Name: _____

Title: _____

Signature: _____

Business Ownership Declaration

For Statistical Purpose Only. Required by the City of San Diego.

Company Information

Name: _____

Contact Person: _____

Address: _____

Phone: _____

Email: _____

Ownership Classification

*Includes Individuals, Sole Proprietorships, Partnerships, LLC's and Corporations

Women owned Business (WBE – SWBE) – 51% ownership and active management

Minority Owned Business (MBE – SMBE) – 51% ownership and active management

Disadvantaged Business (DBE): a for-profit small business that is at least 51 percent owned by one or more individuals who are both socially and economically disadvantaged as defined in Code of Federal Regulations Title 49 part 26. In the case of a corporation, 51 percent of the stock is owned by one or more such individuals; and, whose management and daily business operations are controlled by one or more of the socially and economically disadvantaged individuals who own it.

Disabled Veteran Business Enterprise (DVBE)

Small Business Enterprise (SBE)

Small Local Business Enterprise (SLBE)

None Apply

Certifications

Yes No Ownership Classification has been certified by a city, federal, state or private agency.

Certifying Agency: _____ Certification Date: _____

Certifying Agency: _____ Certification Date: _____

Ethnicity

*Required – select one.

African American Asian Caucasian

Hispanic Filipino Native American

Pacific Islander Other: _____