

Qualification Program

for

Coaching, Executive Coaching, Training and Facilitation Services

Application Particulars

University of Technology Sydney (UTS)

Note: There are 12 pages in this document. Please make sure you have read them all before submitting your response. You may need to print the document and read it offline.

TABLE OF CONTENTS

[1. DEFINITIONS 3](#_Toc340044473)

[2. APPLICATION FOR ADMISSION TO THE PROGRAM 3](#_Toc340044475)

[3. ADMISSION PROCESS 5](#_Toc340044476)

[4 EVALUATION CRITERIA 5](#_Toc340044477)

[5. INTERVIEW WITH ASSESSMENT COMMITTEE 5](#_Toc340044478)

[6 NOTIFICATION OF ASSESSMENT OUTCOME 5](#_Toc340044479)

[7. REQUEST FOR REVIEW OF THE ASSESSMENT OUTCOME 5](#_Toc340044480)

[8. CHANGES TO QUALIFIED AGENCY DETAILS 5](#_Toc340044481)

[10. REMOVAL FROM THE PANEL/DISQUALIFICATION 6](#_Toc340044482)

[11. PUBLICITY 6](#_Toc340044483)

[12. CONFIDENTIALITY 6](#_Toc340044474)

[13. DISCLAIMER 7](#_Toc340044484)

[14. QUALIFICATION NO GUARANTEE OF TRANSACTION 7](#_Toc340044485)

[15. REVIEW AND DEVELOPMENT OF THE PROGRAM 7](#_Toc340044486)

[16. PROGRAM FLOW CHART – BASIC (see following page) 7](#_Toc340044487)

[Schedule 1: Application Form 9](#_Toc340044489)

[Schedule 2 – UTS Master Agreement 13](#_Toc340044490)

DEFINITIONS

**Coaching, Executive Coaching, Training and Facilitation Services** means the provision of Coaching, Executive Coaching, Training and Facilitation Services in accordance with the Services as listed in the Master Agreement (see Schedule 2).

**Applicant** means a service provider that has submitted an Application to be considered as a Qualified Provider under the Program.

**Application** means a written application by the Applicant in the form prescribed in Schedule 1.

**Assessment Committee** means the UTS representatives who are responsible for reviewing Applications and determining suitable Applicants for membership on the UTS Qualified Provider Panel.

**Qualified Provider** means a Coaching, Executive Coaching, Training and Facilitation Services provider whose Applications has been formally approved by the Assessment Committee. Such an Applicant will be included in the UTS Qualified Coaching, Executive Coaching, Training and Facilitation Services Panel.

**Unsuccessful Provider** means a Provider who’s Application has been reviewed by the Assessment Committee but does not comply with UTS requirements or has otherwise been deemed unsuitable. Such Providers **will not** be included in the UTS Qualified Coaching, Executive Coaching, Training and Facilitation Services Panel.

**Disqualified Provider** means a Provider who has previously been approved for inclusion on the UTS Qualified Coaching, Executive Coaching, Training and Facilitation Services Panel, but who during the course of their Agreement has been removed from the Panel by UTS for reasons not limited to those listed in Section 10.

**Program** means this qualification program administered by UTS which is used to evaluate and select suitable Applicants for inclusion in the UTS Qualified Coaching, Executive Coaching, Training and Facilitation Services Panel for the provision of Coaching, Executive Coaching, Training and Facilitation Services. **This Program DOES NOT cover the provision of Coaching, Executive Coaching, Training and Facilitation Services that UTS Staff seek for personal development outside of UTS and their employment.**

**UTS Qualified Coaching, Executive Coaching, Training and Facilitation Services Panel** or **Panel** means the list of Qualified Providers who have been approved for use at UTS via the Program. UTS will commence use of the Panel from 15th December 2014.

APPLICATION FOR ADMISSION TO THE PROGRAM

Applications must be complete and in the form prescribed in Schedule 1.

Applications must be delivered in accordance with the delivery instructions described in Schedule 1.

All Applicants must ensure that they comply with the following requirements before submitting an Application:

* + 1. Acceptance of the clauses in the ‘UTS Master Agreement – Coaching, Executive Coaching, Training and Facilitation Services” see Schedule 2).
    2. Score a minimum of 65 out of 100 on the Selection Criteria

|  |  |  |  |
| --- | --- | --- | --- |
| ***Gradable Requirements*** | | ***Sub-Weighting (%)*** | ***Total Weighting (%)*** |
| **Coaching, Executive Coaching, Training and Facilitation Services Capability (Individual)** Experience working on similar sized programs and with other similar organisations | Demonstrated capability Coaching, Executive Coaching, and/or Training and/or Facilitation Services at similar Australian and international universities or organisations | 10 | **35** |
| Reputation and proven track record delivering quality Coaching, Executive Coaching, and/or Training and/or Facilitation Services | 10 |
| Sector knowledge, both of Australian and international higher education sectors | 5 |
| Qualifications, credentials and accreditation in diagnostic tools | 5 |
| Outcome focused and can demonstrate examples of Coaching, Executive Coaching, and/or Training and/or Facilitation Services effectiveness | 5 |
| **Process (Quality)** Ability to provide best practice Coaching, Executive Coaching, Training and Facilitation and input into the design of supporting materials | Depth and breadth of strategies used to coach a diverse range of individuals and groups | 10 | **30** |
| Quality of Coaching, Executive Coaching, and/or Training and/or Facilitation Services capability | 10 |
| Quality of Coaching, Executive Coaching, and/or Training and/or Facilitation techniques and uses tried and tested, innovative methodology | 5 |
| Quality of stakeholder management | 5 |
| **Fees** | Fees, associated costs and terms of business offered | 10 | **10** |
| **Flexibility** Ability to align with and incorporate existing UTS tools, frameworks and processes into their approach | Flexibility and availability - able to work around obstacles and compromise in order to work around our schedule and meet our requirements | 3 | **10** |
| Able to align to UTS strategy and objectives and incorporate these in coaching and facilitation | 3 |
| Previous experience working successfully with UTS | 2 |
| Facilities to support Coaching, Executive Coaching, and/or Training and/or Facilitation Services, i.e. on office, equipment, tools, etc… | 2 |
| **Evaluation** Ability to provide a thorough, honest, reliable and timely evaluation of their work | Effective techniques to evaluate and measure behavioural shift | 4 |  |
| Can provide consistent updates through the assignment and can provide monthly reports during periods of regular or ongoing engagement | 3 | **10** |
| Can provide written feedback of effectiveness of the service at the end of each assignment. | 3 |  |
| **Partnering** Extent to which they are able to partner with another provider | Able to partner with other providers when required | 2 | **5** |
| Can source other providers effectively when they are needed | 2 |
| Has previous experience in partnering with other vendors | 1 |
| **TOTAL SCORE** | | | **100** |

Only those Applications which fully satisfy all requirements will be considered by the Assessment Committee.

ADMISSION PROCESS

The Assessment Committee will determine membership of the Panel to be formed under the Program.

The Panel will be comprised of Qualified Coaching, Executive Coaching, Training and Facilitation Services Providers who have been approved following an assessment of their Application submitted in the form prescribed in Schedule 1 and in accordance with all instructions.

Applications may be made at any time during the life of the Program and will be assessed periodically at the discretion of the Assessment Committee.

Unsuccessful Providers may submit a revised Application after a period of 6 months has passed from being notified they were unsuccessful. Prior to the expiration of such period any Applications received from Unsuccessful Providers will be discarded without review.

In certain circumstances Disqualified Provides may at the discretion of UTS be permitted to submit a new Application after a period of 12 months has passed from being notified of their disqualification. Such permission will be granted by the Evaluation Committee on a case by case basis according to the severity of the reasons for disqualification.

EVALUATION CRITERIA

Applications will be assessed according to the following evaluation criteria:

* + 1. Satisfaction of all requirements listed in Clause 2 of this document
    2. Demonstrated expertise in the work types and specialties applied for
    3. Favourable commercial terms
    4. References from 2 current or past clients within the last 3 years
    5. Experience in the tertiary education sector or similar bodies
    6. Any other criteria deemed relevant by the Assessment Committee

INTERVIEW WITH ASSESSMENT COMMITTEE

Where further clarification is required, an Applicant may be invited to attend an interview with the Assessment Committee.

NOTIFICATION OF ASSESSMENT OUTCOME

The Assessment Committee may accept an Application (with or without limitation) or reject the Application.

UTS will notify all Applicants of the outcome of their Application in writing.

REQUEST FOR REVIEW OF THE ASSESSMENT OUTCOME

Should an Applicant believe that there are substantive grounds for UTS to reconsider their decision not to admit the Applicant to the Program, the Applicant may request a review of the decision in writing, providing full details of the reasons for the request, to:

Strategic Procurement Department

University of Technology Sydney

Bldg 10, Level 6, 235 Jones Street, Ultimo NSW 2007

UTS will inform the Applicant in writing of the outcome of the review.

CHANGES TO QUALIFIED PROVIDER DETAILS

Qualified Providers must immediately inform UTS of any significant change in their financial capacity, capability, ownership status, contact details or address by writing with full details to the Strategic Procurement department (see address in 7.1).

Failure to comply with this requirement may result in immediate disqualification.

MANAGING QUALIFIED PROVIDER PERFORMANCE

UTS will manage Qualified Provider performance through reviews of Key Performance Indicators and feedback from UTS customers including but not limited to via Customer Satisfaction Surveys.

UTS staff will be asked to complete a Provider Assessment for all Provider engagements. Post-engagement Provider Assessments will also be requested from these managers upon completion of all assignments.

Where no transactions have transpired during the period under review, there will be no performance review undertaken.

REMOVAL FROM THE PANEL/DISQUALIFICATION

Aside from a Providers poor performance, UTS may Disqualify and remove a Qualified Provider from the Panel entirely for any of the following reasons:

* + 1. breach of the UTS Master Provider Agreement
    2. breach of any of any terms and conditions or other mandatory requirements of this Program
    3. adverse change in business status
    4. substantiated reports of unsatisfactory performance from other organisations
    5. conviction for breach of its obligations under NSW occupational health and safety legislation or environmental protection

Before a Qualified Provider is Disqualified from the Panel under clause 10.1, UTS will advise the Provider in writing of the matters prompting the proposed action and will give the Qualified Provider the opportunity to provide reasons as to why the removal from the Panel should not occur.

Where a Qualified Provider considers that there are substantive grounds for UTS to reconsider its decision under this Clause 12, it may request a review of the decision in writing, providing full details of the reasons for the request for review to the Strategic Procurement department (see address in 7.1).

PUBLICITY

Qualified Providers must not advertise, promote or publicise in any form their admission to the Program without the written consent from UTS.

# CONFIDENTIALITY

12.1 All information provided in response to this Program is considered commercial-in-confidence material unless otherwise required by law. As such, it will be held, considered, and disposed of in confidence.

12.2 Information submitted with an Application may be subject to investigation, reference checking, searches, interviews, enquiries, and confirmation. In submitting an Application, Applicants are deemed to have authorised any such action.

DISCLAIMER

UTS reserves the right, at its absolute discretion to:

* + 1. accept an Application with or without conditions;
    2. reject an Application;
    3. suspend a Qualified Provider’s admission to the Program; and
    4. remove a Qualified Provider from the Program

QUALIFICATION NO GUARANTEE OF TRANSACTION

The receipt of qualification by a Qualified Provider does not guarantee:

* + 1. continuity of qualification for the duration of the Program
    2. work of any kind or quantity

It is at the discretion of UTS staff members which Qualified Provider/s from the Panel they will engage for each of their requirements. UTS staff members will normally consult with their People Unit Business Partner prior to engaging a Provider.

REVIEW AND DEVELOPMENT OF THE PROGRAM

The Program will be monitored by UTS to assess whether the objectives and intent of the Program are being met. Modifications may be made at UTS’s discretion during the life of the Program.

PROGRAM FLOW CHART – BASIC (see following page)



Schedule 1: Application Form

**INSTRUCTIONS:**

1. Only those Applicants who satisfy all requirements listed in section 2.3 of the Program conditions may apply.
2. Applicants must include copies of all requested documents with reference made to the corresponding section number in the application form.
3. Applications should be submitted via email to: [StaffExperience@uts.edu.au](mailto:StaffExperience@uts.edu.au)

1. **ORGANISATION DETAILS**

Enter your details in the following table:

|  |  |
| --- | --- |
| If a Company, the Company Name | Click here to enter text. |
| If a Partnership, the Partnership Name | Click here to enter text. |
| If an Individual, the Individual’s Full Name | Click here to enter text. |
| Trading Name | Click here to enter text. |
| Australian Business Number (ABN) | Click here to enter text. |
| Australian Company Number (ACN) | Click here to enter text. |
| Registered Office Address(if a company) | Click here to enter text. |
| Site Address (principal place of business) | Click here to enter text. |
| Postal Address (principal place of business) | Click here to enter text. |
| Alternative Address (if any) | Click here to enter text. |
| Representative Name | Click here to enter text. |
| Representative Telephone Number | Click here to enter text. |
| Representative Email Address | Click here to enter text. |
| Chief Executive Officer’s Name (CEO) | Click here to enter text. |
| Main Switchboard Telephone Number: | Click here to enter text. |
| Company Email Address | Click here to enter text. |
| Website Address: | Click here to enter text. |

1. **APPLICATION OFFERING**
2. We understand that your organisation may provide a range of products and services that fall within any of the Coaching, Executive Coaching, Training and Facilitation categories. Demonstrate your ability to fulfil each of the criteria listed in the table at point 2.3b. Please indicate below the types of services that your company provides and the level you provide this service to:

|  |  |
| --- | --- |
| **Methodology, Module, Course or Type** | **Level** |
| *i.e. Strategy planning* | *Executive and Senior Management* |
| Click here to enter text. | Click here to enter text. |
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| Click here to enter text. | Click here to enter text. |

**Please attach additional documentation if required.**

1. Demonstrate your ability to fulfil each of the criteria listed in the table at point 2.3b.

**Please attach additional documentation if required.**

|  |
| --- |
| **Coaching, Executive Coaching, Training and Facilitation Services Capability (Individual)** Experience working on similar sized programs and with other similar organisations  Click here to enter text. |
|
|
|
|
| **Process (Quality)** Ability to provide best practice Coaching, Executive Coaching, Training and Facilitation and input into the design of supporting materialsClick here to enter text. |
|
|
|
| **Fees**  Click here to enter text. |
| **Flexibility** Ability to align with and incorporate existing UTS tools, frameworks and processes into their approach  Click here to enter text. |
|
|
|
| **Evaluation** Ability to provide a thorough, honest, reliable and timely evaluation of their work  Click here to enter text. |
|
|
| **Partnering** Extent to which they are able to partner with another provider  Click here to enter text. |
|
|

1. **CAPABILITY**

Provide a brief statement demonstrating your capability to services for each **Methodology, Module, Course or Type** nominated. Please include a copy of your organisational structure and detail the experience and qualifications of your staff in managing these categories.

Click here to enter text.

1. **ACCEPTANCE OF UTS TERMS AND CONDITIONS**

Please advise your acceptance of the clauses in the ‘UTS Master Agreement – Coaching and Executive Coaching’ (Schedule 2). Providers must describe and give reasons for any proposed exceptions and state any effect on their Application (including commercial terms) if the proposed exception is rejected by UTS.

Click here to enter text.

1. **REFERENCES**

For Providers who have not provided services to UTS during the previous 12 months, please provide two (2) references. Use the example table below in your response. Preference will be given to those Applicants who have relevant experience in the tertiary education sector.

|  |  |
| --- | --- |
| Company Name: | Click here to enter text. |
| Referee Name | Click here to enter text. |
| Referee’s Title: | Click here to enter text. |
| Referee’s Contact Number: | Click here to enter text. |
| Number of years providing this service: | Click here to enter text. |

|  |  |
| --- | --- |
| Company Name: | Click here to enter text. |
| Referee Name | Click here to enter text. |
| Referee’s Title: | Click here to enter text. |
| Referee’s Contact Number: | Click here to enter text. |
| Number of years providing this service: | Click here to enter text. |

1. **PROPOSED FEES**

Enter your proposed fees below based on the services you can provide.

|  |
| --- |
| Click here to enter text. |

Quoted fees should exclude GST.

1. **PROPOSED BULK DISCOUNTS**

Please indicate any bulk discounts that may apply in the event of multiple Assignments.

Click here to enter text.

1. **COPIES OF REGISTRATION/MEMBERSHIP**

Attach a copy of any relevant Memberships and any other industry-specific bodies.

1. **COPIES OF INSURANCES**

Attach copies of insurances held including Professional Indemnity, Public Liability & Workers Comp.

1. **COPIES OF EXISTING STAFF CONTRACTS**

If your company has existing contracts in place for assignments at UTS that are likely to continue past 15th December 2014, please provide details and copies of relevant contract/s.

Click here to enter text.

1. **NO COLLUSION OR CONFLICTS OF INTEREST**

In lodging a response to this Program, are you aware of any real or perceived conflicts of interest (including any existing relationships, or collusive behaviour with other Providers) that require your disclosure?

Yes  No

Anyone failing to declare, or knowingly making a false declaration in their response is liable to criminal [prosecution](http://www.lawhandbook.org.au/handbook/go01.php#id4591690)for [perjury](http://www.lawhandbook.org.au/handbook/go01.php#id4591141). If UTS becomes aware of an improper conflict of interest by a successful respondent after an Agreement has been executed, then UTS reserves the right to terminate the Agreement and any other contract that has been made under it, and may seek further recourse as appropriate.

Schedule 2 – UTS Master Agreement

Refer attached document titled “UTS Master Agreement – Coaching, Executive Coaching, Training and Facilitation Services Providers”.